



Situational analysis and analysis of prospects for the development
of cultural,
adventure and speleology tourism
in the cities of

Sofia, Montana and Nis

under

the Interreg-IPA Cross-border Cooperation Bulgaria-Serbia Programme, co-
financed by the Instrument for Pre-Accession Assistance II (IPA II) of the
European Union.

Priority Axis 1: Sustainable Tourism

Specific objective 1.1: Tourist Attractiveness

2018



Introduction:

The current analysis is developed in the framework of the project CB007.1.11.268 Increasing the tourist information services in the CBC region under the Interreg-IPA Cross-border Cooperation Bulgaria-Serbia Programme, co-financed by the Instrument for Pre-Accession Assistance II (IPA II) of the European Union. The priority axis in which the project positions itself is PA1. Sustainable Tourism.

The general aim of the project is the establishment of relevant conditions for cultural exchange among people and functioning platforms for constructive dialogue between the relevant stakeholders, as well as enhancement of the potential of the region for sustainable and balanced socio-economic development.

It promotes the betterment of the niche tourism activities, exploiting various forms of practices and concepts in the utilization of natural values as a (i) generator of new products and employment possibilities, (ii) source of financial and non-financial benefits for the individual and the societies and (iii) contributor for more resiliency of the image of the border area as an international tourism destination.

Identified target groups:

- Touristic organizations;
- Institutions in the field of nature protection, culture and sustainable tourism;
- Local authorities;
- Rural development institutions/organizations
- Tourists, general citizens, vulnerable groups;

The definitive purpose of the current analysis is to provide detailed background about the speleology, adventure and cultural tourism in the territories of Nis, Sofia and Montana which will serve as a basis for the elaboration of a Common Strategy for the development of cultural, speleology and adventure tourism in the context of the project.

The internal structure of the document is constituted in compliance with its main purpose and strives to present the interested agents with a relevant foundation for a coherent and rational formulation and implementation of various tourism-related activities; it explores the general (as the first part of the analysis is dedicated towards the introduction of global and European tendencies, which are of high common relevance) and the peculiar as the analysis acknowledges the socio-economic differences of the regions within Europe, which in a certain way have the potential to overcome some of the general tendencies, which do not correspond to the inherent logic of their reality.



The legitimacy of the results of the analysis is in direct correlation with the chosen approach, combining several means for achievement of inclusivity and critical comprehensibility:

- Interviews with interested agents from the three cities, preceded by a research for the identification of most relevant questions and their proper formulation in terms of high effectivity of the outcomes; (Annex 8)
- Study of the strategic documents and policies on local, regional and national level regarding the tourism development (with focus on the cultural, adventure and speleology field), assessment of their (i) accessibility, (ii) form and content, (iii) specific objectives and priorities, (iiii) approach, followed by a comparative analysis in order a profoundness of the initial perspective to be achieved;
- Analysis of the socio-economic indicators in each of the three cities, the systematic reasons for their current state and the perspectives for (i) sustainable change– for the regions with relatively low development rates and (i) sustainable continuation of growth processes – for the more developed regions with high development indicators;
- Strengths, weaknesses, opportunities and threats analysis;



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Part I

The role of tourism in a global context as an economic and social phenomenon – quick overview (continues in Annex 1)

The World Tourism Organization defines tourism more generally, in terms which go "beyond the common perception of tourism as being limited to holiday activity only", as people "traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes".

In 1976, the Tourism Society of England's definition was: "Tourism is the temporary, short-term movement of people to destinations outside the places where they normally live and work and their activities during the stay at each destination. It includes movements for all purposes." In 1981, the International Association of Scientific Experts in Tourism defined tourism in terms of particular activities chosen and undertaken outside the home.

Tourism has become an important, even vital, source of income for many regions and even entire countries. The Manila Declaration on World Tourism of 1980 recognized its importance as "an activity essential to the life of nations because of its direct effects on the social, cultural, educational, and economic sectors of national societies and on their international relations."

Tourism brings large amounts of income into a local economy in the form of payment for goods and services needed by tourists, accounting as of 2011 for 30% of the world's trade in services, and for 6% of overall exports of goods and services. It also generates opportunities for employment in the service sector of the economy associated with tourism.

Furthermore, in a more humanitarian perspective, the act of travelling is directly connected to:

- Broadening horizons, as well as learning and developing intelligence;
- Providing a means of self-exploration, and a source of memories and experience;
- Improving sociability. Many theorists, particularly in the Age of Enlightenment, saw the benefits of travel as strengthening human society through the practice of commerce and interaction;



“Travelling through the world produces a marvellous clarity in the judgment of men... This great world is a mirror where we must see ourselves in order to know ourselves.”¹

Four different perspectives of tourism can be identified:

- The tourist: The tourist seeks various psychic and physical experiences and satisfactions. The nature of these will largely determine the destinations chosen and the activities enjoyed;
- The businesses providing tourist goods and service: Business people see tourism as an opportunity to make a profit by supplying the goods and services that the tourist market demands;
- The government of the host community or area: Politicians view tourism as a wealth factor in the economy of their jurisdictions. Their perspective is related to the incomes their citizens can earn from this business. Politicians also consider the foreign exchange receipts from international tourism as well as the tax receipts collected from tourist expenditures, either directly or indirectly. The government can play an important role in tourism policy, development, promotion, and implementation;
- The host community: Local people usually see tourism as a cultural and employment factor. Of importance to this group, for example, is the effect of the interaction between large numbers of international visitors and residents. This effect may be beneficial or harmful, or both;

Thus, tourism may be defined as **the processes, activities, and outcomes arising from the relationships and the interactions among tourists, tourism suppliers, host governments, host communities, and surrounding environments that are involved in the attracting and hosting of visitors.**

¹ Michel de Montaigne - 28 February 1533 – 13 September 1592; one of the most significant philosophers of the French Renaissance, known for popularizing the essay as a literary genre. His work is noted for its merging of casual anecdotes and autobiography with serious intellectual insight; his massive volume *Essais* contains some of the most influential essays ever written.



The role of tourism as an economic and social phenomenon in the context of the European Union – quick overview (continues in Annex 2)

- Strategic document: Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions - Europe, the world's No 1 tourist destination – a new political framework for tourism in Europe

Tourism is a major economic activity with a broadly positive impact on economic growth and employment in Europe. It is also an increasingly important aspect in the life of European citizens, more and more of whom are travelling, either for leisure or business. As an activity which impinges on cultural and natural heritage and on traditions and contemporary cultures in the European Union, tourism provides a textbook example of the need to reconcile economic growth and sustainable development, including an ethical dimension. Tourism is also an important instrument for reinforcing Europe's image in the world, projecting our values and promoting the attractions of the European model, which is the result of centuries of cultural exchanges, linguistic diversity and creativity.

Tourism is an economic activity capable of generating growth and employment in the EU, while contributing to development and economic and social integration, particularly of rural and mountain areas, coastal regions and islands, outlying and outermost regions or those undergoing convergence. With some 1.8 million businesses, primarily SMEs, employing approximately 5.2 % of the total workforce (approximately 9.7 million jobs, with a significant proportion of young people), the European tourism industry generates over 5 % of EU GDP, a figure which is steadily rising. Tourism therefore represents the third largest socioeconomic activity in the EU after the trade and distribution and construction sectors. Taking into account the sectors linked to it, tourism's contribution to GDP is even greater; it is estimated to generate over 10 % of the European Union's GDP and provide approximately 12 % of all jobs. In this regard, observing the trend over the last ten years, growth in employment in the tourism sector has almost always been more pronounced than in the rest of the economy.

Four priorities made explicit regarding the tourism development of the European Union:

1. Stimulate competitiveness in the European tourism sector;
2. Promote the development of sustainable, responsible and high-quality tourism;



3. Consolidate the image and profile of Europe as a collection of sustainable and high-quality destinations;
4. Maximise the potential of EU financial policies and instruments for developing tourism;

General conclusion(s):

Tourism plays a major role in the EU economy. According to the European Commission, it is the third largest socio-economic activity in the EU (after the trade and distribution, and construction sectors), and has an overall positive impact on economic growth and employment. Tourism also contributes to the development of European regions and, if sustainable, helps to preserve and enhance cultural and natural heritage.

Part II

Overview of the tourism sector in the Republic of Serbia (incl. current tourist visits and interest to the sites, management, etc.)

Introduction:

The Republic of Serbia is part of Europe, one of the world's leading tourist destination. This fact, combined with Serbia's continental location and rich natural and cultural heritage, forms the very structure of the development of the tourism industry of the Republic and is of great assistance for its eventual positioning as a main touristic destination in the international reality.

Nevertheless, there are some factors, which obstruct the potential of the country from its full realization: social, political and economy related.

Firstly, in the past the Republic of Serbia has not been a predominantly tourist-oriented county, with the development of tourism only starting after World War II, mostly for business travel and health



tourism, which implicates lack of experience, resulting in relatively slow rates of validation as a major tourist destination on the market.

Secondly, Serbia was part of the Federal People's Republic of Yugoslavia, proclaimed in November 1945 under the governing of Josip Tito – the first president of the new—socialist—Yugoslavia. Once a predominantly agricultural country, Yugoslavia was transformed into a mid-range industrial country, and acquired an international political reputation by supporting the decolonization process. During these years a different logic of development was followed, which inevitably affected the tourism in the country and differed the approach in comparison with other countries. After the disruption of the regime, the organizational deficits became evident and consequently led to a state rather unfavourable when it comes to the tourism sector and respectively rates.

Facts and figures: **Serbia - Tourism Development 1989-2000**

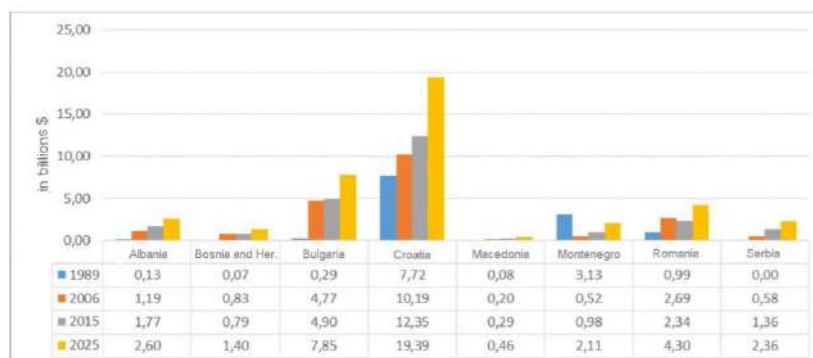
- Decrease of total tourism arrivals 47.9%, domestic 37.8%, foreign 82.4%,
- Decrease of foreign currency income 93.6%
- Fall of the share in total investments (from 2.3% to 0.5%),
- Fall of the share in total foreign currency income from 5.8% to 1.7%
- Average use of the total accommodation capacities 24.8%

The reasons for stagnation, i.e. great lag in tourism turnover growth and average foreign currency income per overnight stay of foreign tourists should be sought in a very unfavourable structure of tourism offer, in shortcomings in quality and contents of the existing tourism offer, inadequate assortment, quality, scope and structure of consumer goods that do not encourage the increase of foreign tourist consumption (Oppermann 1997).

Thirdly, at the current moment Serbia is not a member of the European Union, which has a very strong position regarding the importance of tourism as a meeting point of the different cultures within Europe and in that sense has built over the years a comprehensive policy regarding its sustainable development; furthermore it dedicates many operational and financial resources with the aim to achieve a balanced and symmetric general condition of the tourism industry in its member countries. This creates premises for differences in the industries of neighbouring areas, which is the case of Bulgaria and Serbia; after 2007 the tourism influx in Bulgaria has experienced significant increase due to mitigation of rules and regulations and the free movement principle in the EU. Nevertheless, the Union supports the integration and development of non-member countries and countries with a strong perspective of joining such as Serbia with the general goal of i) eliminating disparities within the territory of Europe and the specific one ii) better preparation for actual membership. Evidence of which is the current project and many others, supported by the different programmes launched by the Community.



Figure 4. Expenditure of Foreign Tourists
in the Republic of Serbia and Selected Competitive Countries



Source: Report Travel & Tourism economic impact 2017 Serbia - WTTC

Currently, Republic of Serbia is in an accession negotiation process, which was preceded by the decision of the European Council to grant the country candidate status on 1 March 2012.

On 21 January 2014, the first meeting of the Accession Conference with Serbia at ministerial level opened **accession negotiations**. Since then, six Accession Conference meetings at ministerial level were held in Brussels.

The seventh meeting of the Accession Conference with Serbia at ministerial level took place on 11 December 2017.

The conference opened negotiations on:

- Chapter 6 - Company law
- Chapter 30 - External relations.

After this Conference, out of a total of 35 negotiation chapters, 12 chapters have now been opened for negotiations of which 2 chapters have already been provisionally closed. Further Accession Conferences will be planned, as appropriate, in order to take the process forward in the first half of 2018.

The next argument is related to the interdependence of the sectors and industries within a country – as a complex economic activity the development of tourism is in dynamic correlation with other branches of the economy and its progress, respectively stagnation is a result of many factors with unproportional magnitude and scope, which have to be taken into consideration when analysing the condition of the sector.



“Dynamics, scope and structure of tourism economy impose a rhythm on the whole tertiary economy, which it has to follow; at the same time, tourism influences the development and growth of tertiary sector.”²

For example in Serbia (among other countries members or non-members of the EU) exists a malpractice of excessive construction work, often on nature reserves without planning permission, which can be classified as an endemic problem inherited from the communist era and the specificity of the behavioural pattern back then. So the problem here, directly related to the tourism industry, is the process of spoiling of natural resources and the consequent alteration of ecosystems, biodiversity reduction, pollution, etc. which have the potential to harm the international image of Serbia as a tourist destination. However, it cannot be solved independently as the agents in the industry do not possess actual power to alterate the system - they can express their position in a chosen form, but in the jurisdiction of the certain governing organ stands the opportunity for imposing more strict regulations and sanctions regarding illegal construction. Also important aspect here is the general commitment of the country`s government to the environmental issues and the course of action undertaken in regard.

As a conclusion can be said that the role of tourism in the economic development of Serbia is question of major significance that needs to be addressed relevantly, the first step of which - a comprehensive analysis of its current state, followed by an inclusive strategy in compliance with the country`s international engagements and in accordance with its best interest, without leaving the framework of sustainable and responsible course of behaviour.

Tourism Development Strategy of the Republic of Serbia 2016-2025

The Tourism Development Strategy of the Republic of Serbia for the Period from 2016 to 2025 (hereinafter referred to as: the Strategy) was prepared in accordance with Article 7 of the Law on Tourism. The baseline study of the Strategy specifically contains:

- an analysis of the current state and the existing level of tourism development;
- a comparative analysis of tourism in competitive countries;
- an analysis of the advantages and disadvantages of tourism, business mission, vision and goals of tourism development; a selection of priority tourism products, a proposal of the priority tourist destinations;

² Tomic, Radovan, Tamara Gajic, and Denis Bugar. 2012. Tourism as a basis for development of the economy of Serbia. UTMS Journal of Economics 3 (1): 21–31.



- an analysis of the impact on cultural heritage and natural resources and a proposal of a tourism development policy;

Rationale:

The Tourism Development Strategy of the Republic of Serbia ("RS Official Gazette", No. 91/06) adopted for the period from 2006 to 2015 (hereinafter referred to as: the Previous Strategy), establishing the fundamental guidelines for the tourism sector in the Republic of Serbia in the long term, ceased to be valid: therefore a new strategic document was drafted, taking into account the following key aspects:

- 1) The Previous Strategy was implemented to a lesser extent, due to the fact that the global world crisis arose immediately after its adoption, slackening the inflow of investment and slowing down the pace of commercialisation of tourism in the Republic of Serbia;
- 2) Owing to budgetary constraints and other development priorities, as well as the neglect and non-recognition of tourism as one of the key economic sectors, the Government failed to implement an active tourism policy that would give tourism in the Republic of Serbia a significant competitive edge;
- 3) For most of the time since the adoption of the Previous Strategy, the Republic of Serbia was going through a difficult period of finding its own political and economic stability, i.e. internal consolidation, which resulted in lower political and value interest of the Republic of Serbia with respect to tourism development.

Current condition, favouring the development and implementation of a new Strategy:

At the current moment the Republic of Serbia is embarking on the process of European integration and building a unique geostrategic position, presenting opportunities for numerous private and public projects that would aid Serbia in creating clear and unambiguous alternatives for long-term sustainable growth and development in the future. In circumstances when the Republic of Serbia is enhancing its negotiating powers in respect of both closer and more distant global markets, it is realistic to expect more favourable conditions for significant tourism development of the country.

The overall aim: establishment of a systematic approach to tourism, not only through economic indicators, but also through the multiplier effects that tourism has on the overall social development, local and regional development.

Specific objectives made explicit:

- Sustainable economic, environmental and social development of tourism in the Republic of Serbia;



- Improving the competitiveness of the tourism industry and related activities in the domestic and international markets;
- An increase in the direct and total contribution of the tourism sector to the gross domestic product (hereinafter: GDP) of the Republic of Serbia, as well as an increase in direct and total employment in the tourism sector and its share in total employment in the Republic of Serbia;
- Improvement of the overall image of the Republic of Serbia in the region, Europe and worldwide

Importance of the tourism sector for the development of the Serbian economy:

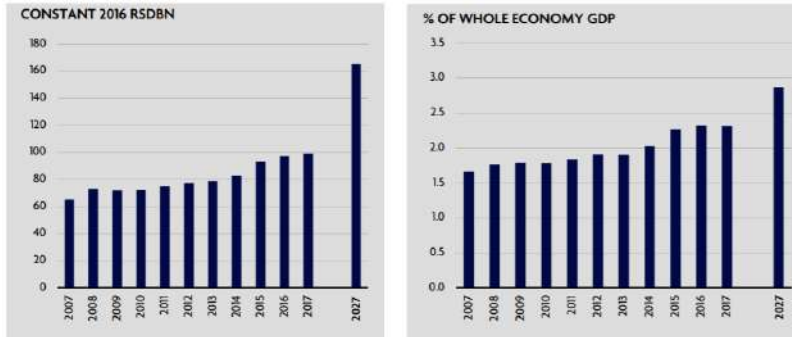
- Defined by external sources

The total contribution of Travel & Tourism includes its 'wider impacts' (ie the indirect and induced impacts) on the economy. The 'indirect' contribution includes the GDP and jobs supported by:

- Travel & Tourism investment spending – an important aspect of both current and future activity that includes investment activity such as the purchase of new aircraft and construction of new hotels;
- Government 'collective' spending, which helps Travel & Tourism activity in many different ways as it is made on behalf of the community at large' – eg tourism marketing and promotion, aviation, administration, security services, resort area security services, resort area sanitation services, etc.;
- Domestic purchases of goods and services by the sectors dealing directly with tourists – including, for example, purchases of food and cleaning services by hotels, of fuel and catering services by airlines, and IT services by travel agents. The 'induced' contribution measures the GDP and jobs supported by the spending of those who are directly or indirectly employed by the Travel & Tourism industry;



SERBIA: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO GDP



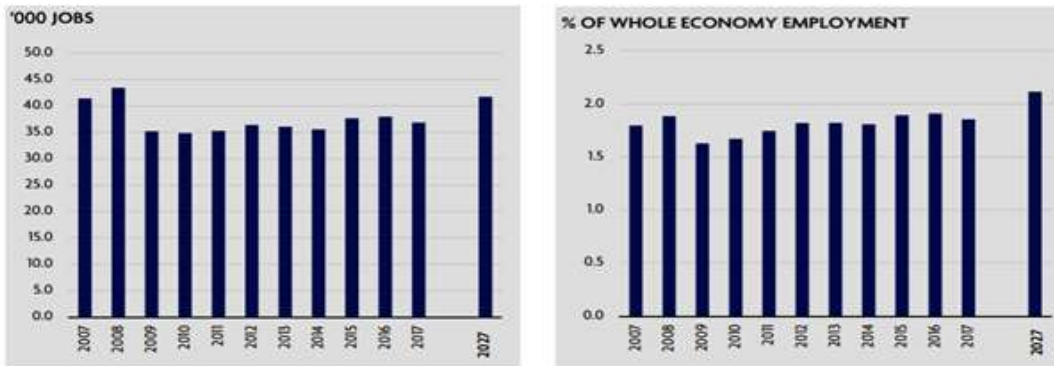
The total contribution of Travel & Tourism to GDP (including wider effects from investment, the supply chain and induced income impacts, see page 2) was RSD280.6bn in 2016 (6.7% of GDP) and is expected to grow by 2.0% to RSD286.3bn (6.7% of GDP) in 2017.

It is forecast to rise by 4.8% pa to RSD456.1bn by 2027 (7.9% of GDP).

3

By 2027, Travel & Tourism will account for 42,000 jobs directly, an increase of 1.2% pa over the next ten years.

SERBIA: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT



The total contribution of Travel & Tourism to employment (including wider effects from investment, the supply chain and induced income impacts, see page 2) was 99,500 jobs in 2016 (5.0% of total employment). This is forecast to fall by 2.3% in 2017 to 97,000 jobs (4.9% of total employment).

By 2027, Travel & Tourism is forecast to support 106,000 jobs (5.4% of total employment), an increase of 0.9% pa over the period.

4

- Defined by the Strategy:

³ TRAVEL & TOURISM ECONOMIC IMPACT 2017 SERBIA

⁴ TRAVEL & TOURISM ECONOMIC IMPACT 2017 SERBIA



Tourism, seen from the perspective of the strategy, can be considered as “undoubtedly one of the leading global industries with permanent, stable and sustainable growth” which circumstance defines the government’s efforts for its positioning at the centre of the Serbian economy.

The particular data, presented for the legitimization of the tourism importance include:

- 1) Total contribution of tourism to GDP of the Republic of Serbia - 6.4% in 2015;
- 2) Tourism directly contributed to 2.2% of GDP of the Republic of Serbia;
- 3) Tourism and hospitality industry (according to the above methodology) accounted for about 30,000 (directly) created new jobs, while about 157,000 new jobs in total were created in tourism and related activities involving numerous newly founded micro and small-sized enterprises in the tourism and hospitality industry and related activities;
- 4) "Invisible export” accounted for 7.3% of the total export of the Republic of Serbia, i.e. almost 29% of the export of services;
- 5) Investments in tourism accounted for 4.1% of total investment in the Republic of Serbia;

Furthermore, the relevant authorities have not only expressed the significance of the tourism sector, but have also declared willingness to actively work for its development and modernization:

by accepting the Strategy, the Government will accept not only the vision and goals of tourism development, but also other duties and responsibilities, in particular:

- ❖ *To position tourism as one of the priority development sectors;*
- ❖ *To continue with the implementation of development plans for key destinations as the basis of the growth model and the future of tourism development;*
- ❖ *To establish effective interdepartmental cooperation and make efficient use of the available EU funds;*
- ❖ *To be proactive in the strengthening and capacity building of NTOS (budgets, human resources, institutional support);*
- ❖ *To responsibly and actively guide the tourism sector, particularly through a policy of incentives and exemptions;*
- ❖ *To strengthen the PPP model in terms of increasing investments in tourism;*



Quick overview:

The main tourism activities in Serbia include tourism in major cities, spa tourism, the cultural and natural heritage, hunting, fishing, village tourism and river tourism.

Negative environmental impacts of tourism include pressure on natural resources, biodiversity and habitats, waste generation and pollution. Unsustainable tourism development could lead to the same forms of pollution as any other industry: emissions in the air, noise, waste, waste water discharge, discharge of oil and chemicals, even architectural/scenic pollution. Timely planning of tourism may prevent damages and expensive mistakes and avoid gradual degradation of natural values significant for tourism. The current negative environmental impacts of tourism activities are caused by weak implementation of planning and construction regulations, lack of infrastructure for waste water treatment and uncontrolled waste disposal, and inefficient management of protected natural values.

The objectives of sustainable development of tourism include:

- ❖ Improving accommodation capacities;
- ❖ Develop the quality assurance system in tourism and consumer protection systems;
- ❖ Develop an IT system for tourism (tourist information centers, leaflets, image, positioning, etc.);
- ❖ Develop additional tourism supply with cost-effective operation and potential for local development (trade, gastronomy, hospitality services, travel agencies, etc.), generating new employment accompanied by maximum preservation of cultural heritage and natural diversity;
- ❖ Identify and remove current and potential conflicts between tourism and other activities related to use of resources;

The tourism sector is widely recognized as a sector that has the potential, and this is reflected in the fact that there is a vertical institutional structure for tourism development. Apart from the Ministry of Economy and Regional Development, which is in charge of tourism development, there is the Tourist Organization of Serbia and a network of tourist organizations in municipalities. The Law on Tourism sets out the establishment of the Tourism Development Agency, which should provide an adequate framework for the implementation of the Tourism Development Strategy.



Table 5. Tourist Arrivals in the Republic of Serbia from 2007 to 2015

Year	Tourist arrivals ⁷ (thousands)					
	Total	Index	Domestic	Index	Foreign	Index
2007 ⁸	2,306	115	1,610	105	696	148
2008	2,266	98	1,619	101	646	93
2009	2,021	89	1,376	85	645	100
2010	2,000	99	1,318	96	683	106
2011	2,068	103	1,304	99	764	112
2012	2,079	100	1,270	97	810	106
2013	2,192	105	1,271	100	922	114
2014	2,192	100	1,160	92	1,029	112
2015	2,437	111	1,305	112	1,132	110

Source: SORS

Characteristics of the tourism demand in the Republic of Serbia

Tourism in the Republic of Serbia has gone through a vigorous restructuring of sources of demand. It is worth noting that the influx of domestic tourists decreased after 2008, mainly due to the economic crisis which affected the standard of living in the Republic of Serbia. On the other hand, the influx of foreign tourists from European countries registered continuous growth, including what is becoming a traditionally high number of visitors from the countries in the region. In 2015 the first signs of recovery of domestic demand have been witnessed.

Important facts and figures:

- ❖ A total of 2,437,000 tourist arrivals were registered, representing a rise of 11% over 2014. The average annual growth rate of the total number of tourist arrivals compared to 2007 is 0.8%;
- ❖ A total of 1,305,000 domestic tourist arrivals were registered (an increase of 12% over 2014), accounting for 53.5% of the total number of arrivals. An average annual decrease of 2.7% was registered in this category during the period under review;
- ❖ A total of 1,132,000 arrivals were registered in the category of foreign tourists (10% more than in 2014), i.e. 46.5% of the total tourist arrivals, the average annual increase from 2007 to 2015 being 6.3%.



Table 6. Overnights in the Republic of Serbia from 2007 to 2015

Year	Overnights ⁹ (thousands)					
	Total	Index	Domestic	Index	Foreign	Index
2007 ¹⁰	7,329	111	5,853	105	1,476	145
2008	7,334	100	5,935	101	1,398	95
2009	6,776	92	5,307	89	1,469	105
2010	6,413	95	4,961	94	1,452	99
2011	6,645	104	5,002	101	1,643	113
2012	6,485	98	4,688	94	1,796	109
2013	6,567	101	4,579	98	1,988	111
2014	6,086	92	3,925	86	2,161	109
2015	6,652	109	4,242	108	2,410	112

Source: SORS

- ❖ A total of 6,652,000 overnights were registered, representing a rise of 9% over 2014. The average annual growth rate of the total number of overnights compared to 2007 is 1.2%;
- ❖ Domestic tourists registered 4,242,000 overnights or 8% more than in 2014, providing the first indicator of growth after eight years of decrease and accounting for 64% of the total number of overnights. An average annual decrease of 4.1% was registered in this category during the period under review;
- ❖ Foreign tourists registered 2,410,000 overnights (12% more than in 2014), accounting for 36% of the total number of overnights in the Republic of Serbia, the average annual increase from 2007 to 2015 being 7.5%;
- ❖ In terms of number of overnights in 2015, spas received the biggest influx (1,855,000 overnights), retaining the level achieved in 2014, and recording a rise in foreign tourist overnights (231,000) of 14.7%;
- ❖ Based on the registered number of overnights, the most popular destination for domestic tourists, after spa centres, were the mountainous areas (1,419,000 overnights), recording an increase of 19% compared to 2014;
- ❖ The structure of foreign tourists in 2015 shows that tourists from the region have the biggest share (45%), specifically: Bosnia and Herzegovina (87,000 arrivals / + 17%; 192,000 overnights / +17%), Montenegro (71,000 arrivals / + 15%; 171,000 overnights / + 25%) Croatia (66,000 arrivals / + 3%; 121,000 overnights / + 4%), Slovenia (66,000 arrivals / + 2%; 115,000 overnights / + 3%);
- ❖ the largest number of arrivals from EU countries was recorded from Germany (61,000), Romania (44,000), Italy (44,000) and Greece (44,000);



- ❖ the largest number of arrivals from other European countries was for tourists from Turkey (64,000), the Russian Federation (42,000), Switzerland and Liechtenstein (20,000);
- ❖ the biggest increase of arrivals from non-European countries was recorded by tourists from South Africa (+58%), China and Hong Kong (+45%) and the United States (+22%).

The evident increase of tourist influx from countries in the region and Europe contributed to a significant increase in foreign exchange inflow from tourism, as shown in Table 7.

Table 7. Foreign Currency Inflow from Tourism
in the Republic of Serbia from 2007 to 2015

Year	EUR (millions)	Index	USD (millions)	Index
2007 ¹¹	630	/	531	130
2008	640	101	944	109
2009	617	97	865	92
2010	605	98	798	92
2011	710	117	992	124
2012	708	100	906	91
2013	792	110	1,053	116
2014	863	109	1,139	108
2015	945	109	1,048	92

Source: National Bank of Serbia (hereinafter: NBS)

The positive development tendency of foreign exchange inflow from tourism between 2007 and 2015 is shown in Table 7, with an average annual growth rate of 3.3% in EUR, or 9.8% in USD. The expenditure of our citizens on trips abroad between 2007 and 2015 is shown in Table 8, based on data from the NBS.

SWOT analysis –tourism development in the Republic of Serbia



SWOT analysis is a strategic planning tool which summarizes in a concise and succinct way the key aspects of a project, economic sector or a particular area. In planning procedures, SWOT analysis serves as a sublimation of all analytical findings for the purpose of defining strategic starting points, the vision and major strategies for further development.



In accordance with the meaning of the acronym (SWOT – Strengths, Weaknesses, Opportunities and Threats), the key analytical findings are classified into:

- 1) Strengths - aspects which essentially give advantage over competitors;
- 2) Weaknesses - impediments and aggravating circumstances for the development that need to be improved and overcome (if possible) or bypassed in a way that would allow for the adoption of strategic development directions to which these elements bear no relevance;
- 3) Opportunities – elements and upcoming trends, primarily in the external environment, which can be used for creating competitive advantage;
- 4) Threats – elements and upcoming trends, primarily in the external environment, which may render difficult or, in the long run, even prevent development.

SWOT analysis of the tourism of Republic of Serbia was created on the basis of:

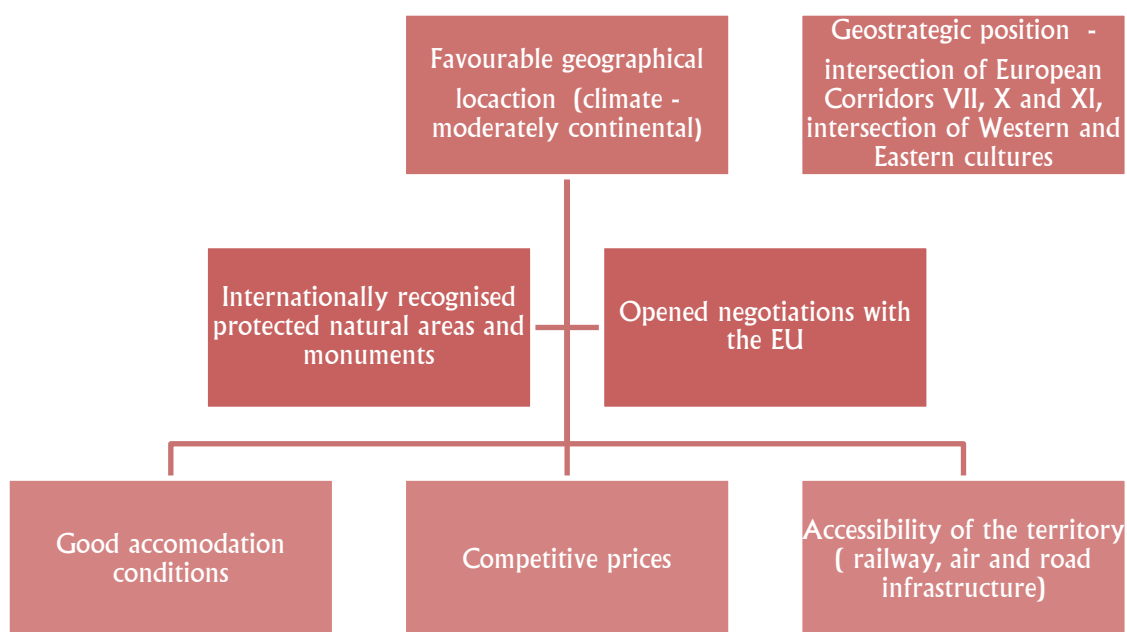
- 1) *Analysis of the current state of the tourism sector;*
- 2) *Comparative analysis: the tourism sector of Serbia and other countries of relevance;*
- 3) *Analysis of development documents and official policies of the Republic of Serbia and all the development plans stated therein;*
- 4) *Analysis of the documents elaborated by external experts (on EU and international level) regarding the tourism development indicators of Serbia;*

Strengths:

- Opened negotiations with the European Union;
- Diverse resource and attraction structure of the Republic of Serbia as a basis for the development of a diversified tourism product portfolio (thermal springs, untouched nature, cultural heritage, internationally recognised protected natural areas and monuments, gastronomy)



- Geo-strategic position of Belgrade and the Republic of Serbia (intersection of European Corridors VII, X and XI, intersection of Western and Eastern cultures, transit position, European river corridors and well developed network of waterways;



- Entry of global and regional brands into the hotel market of the Republic of Serbia (Hyatt, Crowne Plaza, Holiday Inn -InterContinental, Radisson Blu - Rezidor, Luxury Collection - Starwood, and Falkensteiner) and overall improvement of quality standards in the hotel industry;
- Favourable climate;
- A standard of living that generally allows for affordable prices for the tourist product;
- Possibility to practice various types of tourism in relatively compact territory and small distances;
- Good accommodation conditions.



Weaknesses:

Serbia abounds in **protected areas** of special geological, biological and environmental diversity. The **UNESCO list of wetlands of international significance** includes nine sites in Serbia.

Furthermore, Serbia is a country of exceptional cultural heritage and richness. As of 2017, there are five sites in Serbia on UNESCO World Heritage

A passive attitude towards tourism sector and failure to establish leadership and consensus of the relevant authorities on key issues;

Sporadic political insecurity resulting in unfavourable investment climate;

Low compliance with the established international measures for preservation of the natural and cultural heritage; overconstruction, pollution and negligence

Ambiguous international image of Republic of Serbia as a tourism destination

- A passive attitude towards tourism and a failure to establish leadership and consensus of relevant entities on the key issues of the development of the tourism sector of the Republic of Serbia;
- Poor incentive rates, non-financial and financial support for enterprises in the tourism sector and activities related to tourism;
- Small and insufficient investments;
- Insufficient or poor presence of the Republic of Serbia on the global tourism map (undeveloped national tourist identity/tourism brand of the Republic of Serbia);



- Failure to comply with conservation measures in protected natural areas, dilapidated buildings and monuments under state protection, numerous cases of neglect and pollution of the environment and degradation of the area and insufficient coordination of the development of tourism and environmental protection;
- Insufficient participation of local self-government in the planning and development of tourism, inadequate coordination mechanisms at all levels of government in the development of tourism;

Opportunities:

- ❏ Finalization of negotiations and successful accession of Serbia in the European Union – more opportunities to use a large number of programmes and projects for the support and funding of activities in tourism;
- ❏ Dynamic growth and development of air transport (Etihad - Air Serbia strategic agreement) and opening doors to new destinations (Middle East, Asia and the United States);
- ❏ Strengthening regional cooperation and the creation of regional tourism products (with interested countries in the region) in order to attain a better position for the tourism offer and attract tourists from distant (overseas) markets;
- ❏ Foreign policy of the Republic of Serbia - abolition of visas and visa facilitation for particular countries and simplification of issuing visas at the border (Turkey and China);
- ❏ Elaboration of a more competitive marketing strategy regarding the existing tourism offer;
- ❏ Improvement of the existing tourism offer through more investments in infrastructure, better care of natural and cultural resources, incorporation of new routes/sites in accordance with the tourists' demand for high density and meaningfulness of the experience ;

Threats:

- ❏ Decreased rate of the integration processes within the EU due to internal and/or external factors;
- ❏ Enhanced political tension between the Republic of Serbia and other Balkan countries;



- ❏ Disproportional development of the different tourism destinations in the country;
- ❏ Disproportional development of the different tourism sectors in the country and prioritization of some on the expense of the others;

Overview of the tourism sector in the Republic of Bulgaria (incl. current tourist visits and interest to the sites, management, etc.)

Introduction:

Tourism in Bulgaria is a significant contributor to the country's economy. Situated at the crossroads of the East and West, Bulgaria has been home to many civilizations - Thracians, Greeks, Romans, Eastern Romans or Byzantines, Slavs, Bulgars, and Ottomans. The country is rich in tourist sights and historical artefacts, scattered through a relatively small and easily accessible territory. Bulgaria is internationally known for its seaside and winter resorts.

Apart from the traditional forms of tourism, balneological tourism has also been developed in Bulgaria (in Bankya, Banya, Varshets, Velingrad, Kyustendil, Momin Prohod, Pavel Banya, Stara Zagora Mineral Baths, Strelcha and others). In recent years rural tourism and other alternative forms of tourism have become particularly popular.

- There are ten UNESCO World Heritage Sites in Bulgaria. The first four properties were inscribed in the World Heritage List in 1979, and the last in 2017. Bulgaria currently has fourteen additional properties on the Tentative List;
- Bulgaria attracted ~12 million foreign tourists in 2017, according to the World Bank. Tourists from five countries - Greece, Romania, Turkey, Germany, and Russia - account for approximately 50% of all visitors. The sector contributed to 15% of GDP and supported 150 000 workplaces in 2014;
- Bulgaria registered a growth of 7.3% in the number of foreign tourists for the period January-November 2017 compared to the same period a year earlier according to the National Statistics Institute. For the 11 months of the year, the country was visited by 8,425,620



foreign tourists. The largest number of tourists were from **Greece, Romania, Germany, Turkey, Russia and Macedonia;**

- More than 6,3 billion BGN are the revenues from international tourism for the 10 months of year 2017, according to central bank's data. For the period January - October 2017, the growth was 9.2% compared to the same period last year. For October, the revenues from international tourism and travel amounted to nearly BGN 394 mln. The increase compared to October last year is 6.6%;

Measures implemented in the country to increase tourism flows from other EU Member States and from third countries

- *Intensifying cross-border tourism relations:*

In 2011, Bulgaria and Romania were nominated coordinators in the field of tourism and culture for the EU Strategy for the Danube Region. As a result, a communication network was set up and targets for the development of tourism and the enhancement of culture in the Danube region were defined, in order to facilitate the implementation of a stable, effective, inclusive and innovative strategy. In addition, in 2016, the Joint Technical Secretariat of the Priority Area 3 "To Promote Culture and Tourism, People to People Contacts" of the EU Strategy for the Danube Region was open. It is located in Rousse, Republic of Bulgaria and aims to support the responsible institutions in Bulgaria and Romania in implementing their functions as coordinators of Priority Area 3 of the EU Strategy for the Danube Region.

In the framework of the "European Territorial Cooperation" 2014-2020, Bulgaria will strengthen the cross-border cooperation following the specific objectives, which corresponds to the development of the priorities for sustainable development; promotion of innovative technologies to improve environmental protection and resource efficiency in the waste sector, water sector and with regard to soil, or to reduce air pollution; the development of cross-border transport systems and the promotion of sustainable regional and local mobility.

➔ *Among the measures implemented to increase tourism flows from abroad are:*

- ◆ Partnerships with the largest European tour operators;



- ◆ Participation at major tourism fairs in Europe;
- ◆ Joint Presentations of Bulgaria on the Neighboring Markets;
- ◆ Joint PR activities with embassies and tourist representations;
- ◆ Campaigns for the development of joint tourism products in the Balkans with neighboring countries;
- ◆ Campaigns in social media, publications in specialized tourism media;
- ◆ TV and digital campaigns in top TV channels;

Strategic documents:

In 2017 was adopted, following a broad consultation with public authorities, stakeholders, academia, NGOs and an updated **Strategy for the sustainable development of tourism in the Republic of Bulgaria with Horizon 2030**.

This long-term strategy addresses strategic objectives such as improving the infrastructure at national, regional and municipal level, implementation of international standards, best European practices, innovations concerning products, high technologies and human resources in the tourism industry, preservation, protection and quality improvement of current tourism resources.

Another multi-annual program related to tourism development is the adopted **Government Program of the Republic of Bulgaria 2017-2021**. Some of the goals included in the Program are:

- Stimulating sustainable tourism development and reducing regional regional and regional disparities in the development of the sector by promoting cultural and historical heritage and tourist attractions and developing specialized types of tourism;
- Improving the quality of the national tourist product and of the tourist service, and increased consumer protection;
- Improving Business Environment in the Tourism Sector;
- Positioning Bulgaria as a High Class Tourist Destination on the world tourist market in terms of quality of tourism product and its added value;



- Increasing the share of the domestic tourism market by offering specialised types of tourism, and popularization of less known tourist sites and themed routes;

Other national and regional strategic planning documents are:

- National Development Programme Bulgaria 2020;
- Regional Development Plans for level 2 regions 2014-2020 – Bulgaria;
- Municipal Programmes for Tourism Development;

Strategy for the sustainable development of tourism in the Republic of Bulgaria with horizon year 2030

The present Strategy for Sustainable Development of Tourism in the Republic of Bulgaria covers the period 2014-2030. It systematizes the vision, the strategic objectives, the priorities, the activities whose implementation will lead to the establishment of sustainable schemes for development and management of tourism activities.

The developed strategy aims to ensure lasting competitiveness of Bulgaria as a tourist destination, to support the sustainable development of the tourism industry, to rely to the maximum extent on the information obtained from the marketing researches, reports, analyzes and forecasts, incl. such as the World Tourism Organization at the United Nations, the European Tourism Commission, the World Tourism & Travel Council, Euromonitor, Eurostat, etc., to take into account the expectations and intentions of all stakeholders to comply with the requirements to create a sound, realistic and stable positioning Bulgaria on the target markets and being flexible.

Rationale:

The Strategy for Sustainable Development of Tourism in Bulgaria, with a horizon of 2030, prepares a set of long-term strategies in the field of planning, investment, domestic tourism, research, service provision, infrastructure and transport improvement, professional training and qualification of the personnel employed in tourism, the diversification of the tourist product, the restoration and maintenance of existing tourist areas and the improvement of the overall destination.



Current condition, favouring the development and implementation of a new Strategy:

The modern international tourism industry is developing in a complex political, economic and growing competitive environment. According to World Tourism Organization (WTO) data, despite some crisis phenomena (wars, terrorism, natural disasters), international tourism trips and tourism revenues show annual positive growth.

Taking into account the registered growth rates in Bulgaria in recent years, which are higher than the average for the sub-region and in line with the forecasts of the WTO for tourism development in the sub-region of Central and Eastern Europe, one can expect Bulgaria to mark an average annual growth rate of inbound tourism higher than the sub-region of Central and Eastern Europe by around 4% by 2020 and around 3% on average annual growth for 2020-2030.

In line with these projections and under the same conditions, it can be expected that in 2020, Bulgaria will attract more than 9 million foreign visitors without transit (37% growth for the period 2012-2020), and in 2030 over 12 million foreign citizens will visit our country for tourism, ie the incoming tourists to Bulgaria will double compared to the one registered in 2012.

Taking into account the most significant global trends that will shape the new market environment and the future of Bulgarian tourism in 2020 and 2030, **there is a need for:**

1. **Development of tourist products suitable for ages 65+** as a combination of specialized types of tourism - balneo, cultural tourism, eco and rural tourism etc. .;
2. Targeting national advertising to this segment of tourists with a focus on the opportunities the country offers for **development of medical tourism** by expanding the hotel base with the construction of spa and thalassotherapy centers and providing opportunities for tourists from this a segment for taking advantage of the healing properties of Bulgarian mineral waters and healing mud;
3. Emphasis in the **development of specialized tourism products that have the potential to overcome seasonality** and create a special emotional connection with Bulgaria;
4. Search for opportunities to **attract investment in tourism and provide investors with a relaxed investment process** by linking the court procedure for appeals with a percentage of the investment paid by the complainant;



The strategy has been developed in accordance with:

- Tourism Act (promulgated, State Gazette, issue 30 of 2013, amended, SG No. 68/1913);
- National and regional strategic planning documents;
- Trends of the World Tourism Organization by 2050;
- Destination Europe 2020 Program;
- The National Development Program of Bulgaria 2020;
- the National Reform Program;
- The National Regional Development Strategy 2012-2022
- Draft Partnership Agreement with the European Commission;
- Europe 2020 Strategy;
- The EU Strategy for the Danube Region (the Danube Strategy);
- Other.

The overall aim: enhancing the competitiveness and efficiency of Bulgaria's tourism sector by optimizing the use of available natural and anthropogenic resources in line with market requirements and consumer expectations for sustainable tourism development.

Specific objectives made explicit:

- Improving the framework conditions for the development of the tourism industry;
- Increasing the capacity and competitiveness of tourism;
- Building and maintaining the general and specialized infrastructure needed for the development of the tourism industry;
- Preserving and improving the quality of services offered in the tourism industry;
- Diversification of tourism products and development of responsible tourism;
- Stimulating regional development, reducing regional disparities and creating strong regional brands;
- Creation of a Unified Tourist Information System, which will electronically record in real time the movement of tourists' overnight stays in the country;



Importance of the tourism sector for the development of the Bulgarian economy:

- Defined by external sources:

Tourism is a leading, rapidly growing economic sector in Bulgaria in terms of foreign exchange earnings, share of GDP and job creation. Its development contributes to the development of other sectors of the national economy (in particular, trade, transport, communications, agriculture, household goods, etc.), diversification of economic activities in underdeveloped regions, the economic well-being of Bulgarian citizens and their quality of life. At present, more than 1/10 of Bulgaria's GDP is formed by revenues from international and domestic tourism and 15.6% of the Bulgarian economy is the result of the multiplier effect of tourism, more than 170 000 people are direct employment in the sector and the total number of employed in tourism and tourism-related industries are around 500 000 people.

For the last years, tourism has become an economic activity that helps diversify the economy in the regions, creates employment and mobilizes local and foreign investment. The different types of tourism - rural, ecological, cultural - have established themselves as an activity creating a gross added value for the regions based on a better use of local development potential - natural resources and landmarks, climatic conditions, cultural and historical heritage. The cultural and creative industries contribute to the development of cultural tourism in the regions and to the promotion of cultural traditions and identity.

- Defined by the Strategy

The tourism industry occupies an important place in the Bulgarian economy and is an important engine that continues to generate growth by creating new jobs, developing infrastructure and making balance of payments revenues.

According to the World Tourism Organization, the expectations are for an average annual growth of international tourism trips by 3.3% by 2030. As the forecasts are to increase the interest of travelers to lesser known destinations in Eastern Europe, and if Bulgaria is able to develop the necessary tourism products and take advantage of these trends to attract more tourists, it can be expected that tourist trips to Bulgaria will grow higher than the average for the world by 2020. or about 4% average annual growth by 2020.



In the long run, it may expect a reduction in the growth rates in the number of tourist trips to Bulgaria and a 3% annual average growth in 2020-2030 and a 4% average annual growth for the period 2013-2020 due to the higher volume of tourism and greater market saturation. In line with these projections, and under the same conditions, it may be expected that in 2020 Bulgaria will attract more than 9 million foreign visitors without transit (37% growth for 2012-2020), and in 2030 over 12 million foreign tourists, ie the inbound tourist flow to Bulgaria will double compared to the registered one in 2012.

Characteristics of the tourism demand in Republic of Bulgaria from 2005 to 2017

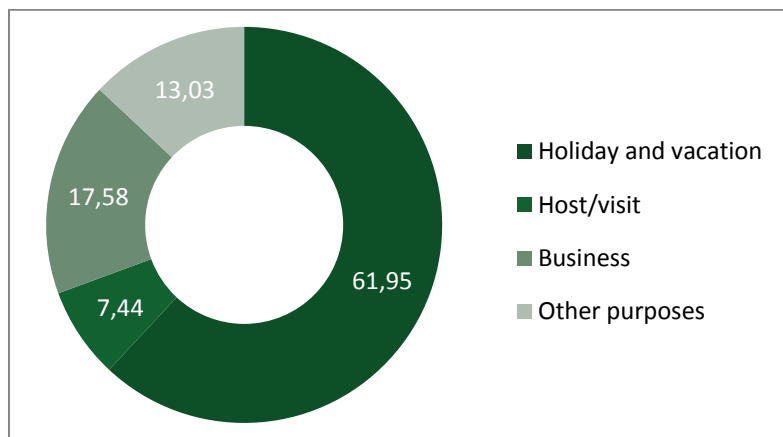
In recent years since 2005, international tourism in Bulgaria has a **steady trend of constant increase** both in the number of foreign tourists who have chosen Bulgaria as a recreation area and in the revenues from international tourism in the current account of the balance of payments.

The trend of steady development of tourism in the post-1999 period was interrupted in 2009 and 2010. The global economic crisis has negatively affected travel worldwide, including in Bulgaria. However, in 2011, positive trends are recovering on almost all indicators. The number of visits of foreign citizens to Bulgaria is 8 712,8 thousand, which is 4% more than in 2010 and by more than 10% more than in 2009. Similar are the indicators for visits to tourism - in 2011 they were 6.1% more than in 2010 and 17.7% more than in 2009.

In 2017 the total number of tourist visits of foreigners in Bulgaria is 8 882 747. Their number is with 7.6% higher than in 2016.

There is an increase in visits for holiday and holiday purposes - 5,502,515 visits and growth of 7,5%. Tourism with purpose of visit accounts for 661 135, down by -2.6% compared to previous statistics. Business visits totaled 1,561,932, increasing by 9.9%. Visits for other tourist purposes are 1 157 165. Vacation and holiday visits account for 61.95% of all tourist visits.

Figure 1. Structure of the tourism visits of foreigners in 2017 in %



Source: National Statistical Institute

Table 2. Tourism visits of foreigners to Bulgaria 2017/2016

	Country	Number	Alteration (number)	Alteration (%)
In total		8 882 747	630 752	7,6
1	Greece	1 157 622	90 517	8,5
2	Romania	1 139 189	42 315	3,9
3	Germany	870 448	43 509	5,3
4	Turkey	636 046	70 678	12,5
5	Russia	557 915	-22 087	-3,8
6	Macedonia	545 431	17 767	3,4
7	Serbia	394 162	19 346	5,2
8	Poland	394 082	28 258	7,7
9	United Kingdom	338 114	64 981	23,8
10	Ukraine	305 486	39 774	15,0

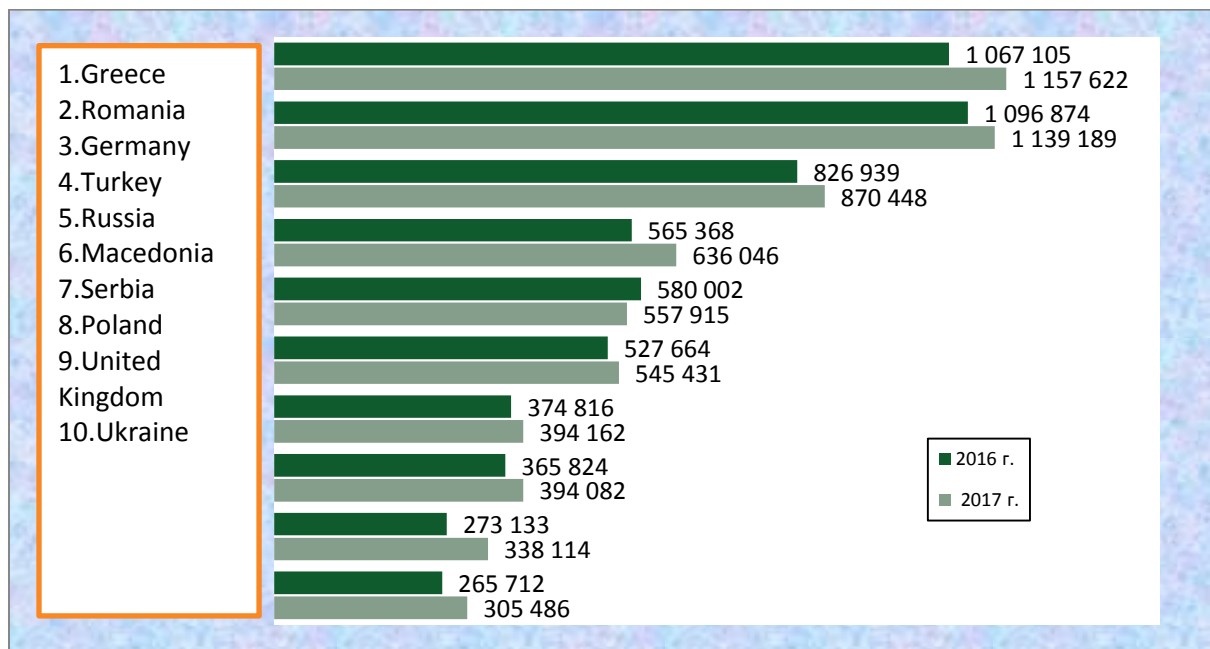


	Country	Number	Alteration (number)	Alteration (%)
11	Moldova	208 594	29 560	16,5
12	Israel	208 141	25 032	13,7
13	France	196 804	32 072	19,5
14	Czech Republic	193 106	-16 667	-7,9
15	Italy	163 566	18 453	12,7
16	Austria	151 218	-15 320	-9,2
17	The Netherlands	135 406	25 115	22,8
18	Belgium	122 387	32 845	36,7
19	Hungary	94 771	1 122	1,2
20	USA	87 624	7 816	9,8
21	Belarus	81 863	-1 657	-2,0
22	Spain	79 977	20 690	34,9
23	Slovakia	74 358	4 543	6,5
24	Denmark	61 363	-6 223	-9,2
25	Sweden	51 244	12 985	33,9
26	Norway	44 528	2 972	7,2
27	Albania	34 033	24	0,1
28	Finland	31 365	2 038	6,9
29	Ireland	30 930	5 542	21,8
30	Lithuania	29 888	7 287	32,2
31	Iran	27 813	-1 000	-3,5



	Country	Number	Alteration (number)	Alteration (%)
32	Switzerland	26 467	-4 368	-14,2
33	China	26 294	7 667	41,2
34	Estonia	23 750	4 298	22,1
35	Croatia	22 757	4 783	26,6
36	Cyprus	22 346	3 389	17,9
37	Slovenia	20 154	867	4,5
38	Bosnia and Herzegovina	18 319	3 693	25,2
39	Latvia	17 842	1 908	12,0
40	Canada	17 831	1 446	8,8
41	Portugal	16 297	6 182	61,1
42	Georgia	14 328	2 973	26,2
43	Australia	13 950	1 700	13,9
44	Japan	13 905	878	6,7
45	Republic of Korea	12 713	1 315	11,5
46	India	12 063	2 146	21,6
47	The Philippines	11 422	-198	-1,7
48	Kazakhstan	10 597	970	10,1
49	Luxembourg	7 577	-316	-4,0
50	Malaysia	6 905	3 575	107,4

Figure 3. Tourism visits of foreigners



Source: NSI

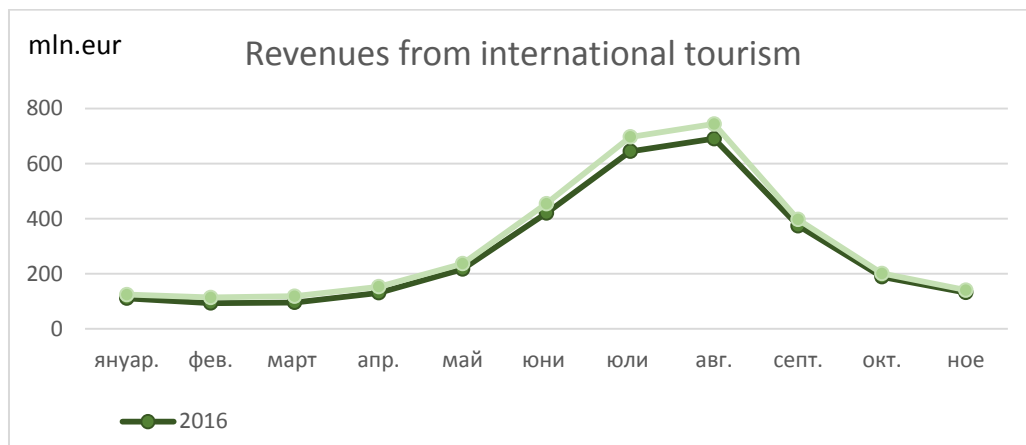
Revenues:

The revenues from international tourism amounted to over BGN 6.6 billion for the period January - November 2017. The growth in comparison to the period January - November 2016 is 9.1%.

Direct contribution

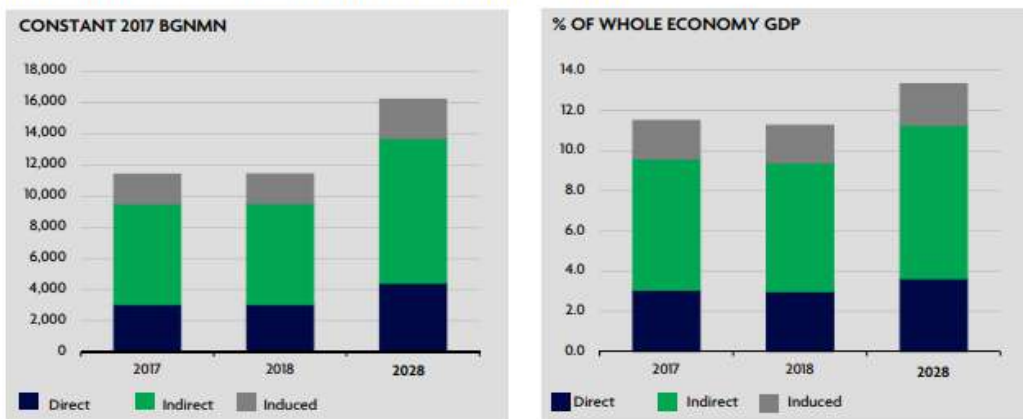
The direct contribution of Travel & Tourism to GDP reflects the ‘internal’ spending on Travel & Tourism (total spending within a particular country on Travel & Tourism by residents and non-residents for business and leisure purposes) as well as government “individual spending” - spending by government on Travel & Tourism services directly linked to visitors, such as cultural (eg museums) or recreational (eg national parks)

The direct contribution of Travel & Tourism to GDP is calculated to be consistent with the output, as expressed in National Accounting, of tourism-characteristic sectors such as hotels, airlines, airports, travel agents and leisure and recreation services that deal directly with tourists.



Source: Bulgarian National Bank

BULGARIA: TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO GDP



¹All values are in constant 2017 prices & exchange rates

Source: TRAVEL & TOURISM ECONOMIC IMPACT 2018

SWOT analysis – tourism development in Bulgaria

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serves as a sublimation of all analytical findings for the purpose of defining strategic starting points, the vision and major strategies for further development.

In accordance with the meaning of the acronym (SWOT – Strengths, Weaknesses, Opportunities and Threats), the key analytical findings are classified into:

- 5) Strengths - aspects which essentially give advantage over competitors;
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- 7) Opportunities – elements and upcoming trends, primarily in the external environment, which can be used for creating competitive advantage;
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SWOT analysis of the tourism of Republic of Bulgaria was created on the basis of:

- 5) *Analysis of the current state of the tourism sector;*
- 6) *Comparison of the current state of the tourism sector with that in the identified competing countries;*
- 7) *Analysis of development documents and official policies of the Republic of Bulgaria and all the development plans stated therein;*
- 8) *Analysis of the documents elaborated by external experts (on EU and international level) regarding the tourism development indicators of Bulgaria;*

The main positives with which Bulgaria is associated as a tourist destination can be summarized as follows: "Variety of favorable factors for the development of tourist activity in a very small geographical area".



membership of the EU	Favourable geographical location	Other relevant determinants
<ul style="list-style-type: none">• programmes and funds, supporting the sustainable development of the tourism industry;• high compliance with the European tourism standards;• easy access to the country;• strengthened international visibility and recognisability;• January - June 2018: Bulgarian Presidency of the EU --> increased tourism flow in the short term; (investments; established general sense of stability; intensified integration processes) --> prospects for resilience of the tourism flow in the long run;	<ul style="list-style-type: none">• Natural resources - access to the sea, mountains, lakes, etc.;• Favorable climate;• Possibility to practice various types of tourism in relatively compact territory and small distances;	<ul style="list-style-type: none">• Good accommodation conditions - sufficiency of bed base; high quality services• competitive prices in comparison with other EU countries : a standard of living that generally allows for affordable prices for the tourist product;• vitality of strategical thinking in terms of tourism development;• various local, regional and national strategies regarding tourism development;• societal acknowledgement of the importance of the tourism sector for the economy of the country

- Membership in the EU
- Good location / favorable geographic location;
- Easy access to the country;
- Natural resources - access to the sea, mountains, lakes, etc .;
- Cultural and historical sights;
- Favorable climate;
- A standard of living that generally allows for affordable prices for the tourist product;
- Possibility to practice various types of tourism in relatively compact territory and small distances;
- Good accommodation conditions.



The negatives are directed mainly towards the overall state policy and the measures which directly or indirectly concern the development of the tourist business in Bulgaria:



- Lack of cohesion in terms of the development of the tourism potential in the different regions: characteristic of Bulgarian tourism remains the seasonal and territorial imbalances. Territorial concentration is high - 79.9% of the beds and 82.9% of the overnight stays (94.5% of the nights spent by foreigners) are concentrated in several districts: Varna, Burgas, Sofia.



- Lack of a consistent positive image of Bulgaria as a tourist destination;
- Corruption;
- Poorly developed transport infrastructure;
- overbuilding;
- Poor maintenance of tourist sites, irreversibility, low hygiene, negligence;
- Disproportions of the qualification of the personnel in the different regions;

Opportunities:

- Overcoming regional imbalances in tourism development;
- Active national and regional marketing and promotion of tourism;
- Improving the business climate and the conditions for attracting foreign and local investors in the utilization of resources in the development of new tourist areas and places;
- Development of specialized tourist infrastructure for development of alternative tourism products;
- Effective absorption of funds for regional development of tourism under different programmes;
- Rehabilitation and construction of a new road network to the tourist sites and modernization of the railway transport;
- Construction of a tourist packages, including combinations of different types of tourism according to the season;

Threats:

- Uncontrolled construction and disturbance of the ecological equilibrium;



- Not knowing and not applying the standards and best practices imposed on tourism development in the EU;
- Loss of interest and trust from strategic investors;
- Focusing the attention of tourist investment interest only in traditional tourist areas;
- Irrational utilization of the existing potential of natural and anthropogenic resources and deterioration of environmental parameters;
- Deterioration of the business environment (legislation, tax policy, etc.)

Part III – Nis, Montana, Sofia

Analysis of the current condition and the perspectives for development of Nis (Republic of Serbia) as a tourist destination in the field of cultural, adventure and speleology tourism

The current analysis aims to present the actual condition and perspectives towards the development of cultural, adventure and speleology tourism, therefore is limited in content; however, the conclusions made can be of assistance for the general evaluation of the condition of the tourist product in Nis as the three areas subject to the analysis are part of a systematic whole, which presupposes certain repeatability of the pattern and provides space for an inductive reasoning, able to grasp the whole through an establishment of a better perspective towards its integral elements.

Introduction:

Tourism resources and tourism development potential in Nis have been the subject of numerous research and analysis in recent years. Despite the differences in approaches, criteria, and



assessments, all studies reaffirm the fact that the above mentioned area has an extremely rich and varied recreational and tourist potential.

- Location:

The town of Nis is located in the Niš valley near the place where the Nishava River flows into the South Morava River at 43 ° 19 'north latitude and 21 ° 54' east longitude. The city centre is 194 meters above sea level (at the monument in the city centre). The highest point on the territory of the town is Sokolov Kamen, the highest point of Suva Planina (1,523 m above sea level), and the lowest one is situated downstream from the mouth of Nishava in the area of Trupale (173 m above sea level). The area of the city covers an area of 596.71 km² and includes Nis, Nishka Bath and 68 suburban neighbourhoods and villages.

Geographically Nis is at the crossroads of the most important Balkan and European transport corridors. Through Nis passes the highway from Belgrade to the valley of Morava, it turns southwards along the valley of Vardar to Thessaloniki and Athens and eastwards to the valleys of Nishava and Maritsa to Sofia and Istanbul and thence to the Middle East. Nis departs from the northwest (to Zajcar, Kladovo and Timisoara) and southwest (to the Adriatic). All of these roads have been known since antiquity as roads through which people, goods, and troops have moved. These were Via Militaris during the Roman Empire and Byzantium and the Tsarigrad road through the Middle Ages and during the Ottoman Empire, and today are the main European transport arteries in the Balkans that turn Nis into an important crossroads between Europe, Asia Minor, The Black Sea region and the Mediterranean.

- Historical background, natural and cultural resources:

Nis is located in South-eastern Serbia and is the administrative centre of Nishki County (Nišavski okrug). The town is situated on the Nishava River with a population of 260 237 inhabitants after population census in 2011.

Demographics of Niš		
Ethnic group	City	Urban
Serbs	243,381	174,225
Romani	6,996	5,490
Montenegrins	659	579
Bulgarians	927	741
Yugoslavs	202	202
Croats	398	344
Others	7,674	1,963
Total	260,237	183,544

← Source: Wikipedia



The town is a crossroads as a road and railway junction on the Balkan Peninsula. A strategically important motorway linking the Middle East with Central and Western Europe passes through Nis. From the Nis railway junction begins a deviation, which goes through Leskovac and Presevo to Thessaloniki in Greece.

Nis is one of the oldest cities in the Balkans, called the "Gate between the East and the West". Since ancient times it has been a crossroads of major trade routes. The city was founded by the Celts in the third century BC. Prehistoric inhabitants called the city of Navisos, the city of the Faith.

Due to its important geographic location, natural resources, transport infrastructure and rich cultural and historical heritage, this region has exceptional opportunities for tourism development. Resort tourism has a long tradition - from the discovery of the mineral springs from the Romans to the present day. There are several famous resorts in Niš County - Nisha Bath Spa (Nish County), Kurushumishka Spa, Prolom Bath Spa and Lukovska Banya Spa (Toplitsa District).

Emperor Constantine's Nis Airport is a destination for many tourists during the winter season, who visit the Kopaonik Mountain and whose number will grow with the increase in the amount of investment near the Balkan Mountains.

In summary, Nis is:

- ❖ The third largest city in Serbia after Belgrade and Novi Sad;
- ❖ Cultural, economic, administrative, business and university centre of South-eastern Serbia;
- ❖ A city located along the European transport corridor № 10;
- ❖ A city from ancient times known as the "door between East and West" because it is a crossroads of roads connecting Europe with the Middle East;
- ❖ A city with over 250,000 inhabitants;
- ❖ University Centre with 13 faculties;
- ❖ One of the oldest cities in Europe, evidenced by the numerous historical sites on the territory of the city;

Criteria for quality of the tourist product of city of Nis (incl. current tourist visits and interest to the sites, management, etc.)- current compliance, deficits and actions to be taken:



The city of Nis is a social, educational, economic and cultural centre of the South- East Serbia; it unarguably possess high potential for sustainable development, which if explored right, can result in benefits of various character for the individual, the community and the country as a whole.

The tourism product of every destination can be defined as a cumulative effect of several important factors, which reflect the most substantial needs of the visitors and are responsible for the positioning of the destination in the international tourism niche:

- Accessibility

The term accessibility can be interpreted in a dualistic way: i)accessibility as constructed proper infrastructure (such as railway and air connections), allowing the potential visitors to organize their time and resources in a predictable and reasonable manner and ii) referring to the concept of “accessible tourism” representing the ongoing endeavour to ensure tourist destinations, products and services are accessible to all people, regardless of their physical limitations, disabilities or age. It encompasses publicly and privately owned tourist locations.

Darcy and Dickson (2009, p34) :

Accessible tourism enables people with access requirements, including mobility, vision, hearing and cognitive dimensions of access, to function independently and with equity and dignity through the delivery of universally designed tourism products, services and environments. This definition is inclusive of all people including those travelling with children in prams, people with disabilities and seniors.

Compliance with the stated criterion:

Regarding point i) – accessibility as constructed proper infrastructure, the city of Nis can be placed in average to high level of compliance with the requirement as it possess functioning infrastructure, although efforts need to be directed towards its modernization.

- Air transport:

Niš has an international airport named after Constantine the Great (international code: INI) which offers flights from and to European cities including Milan Italy (Bergamo), Basel Euroairport and Zurich (Switzerland), Munich Memmingen (Germany), Dortmund (Germany), Berlin Schoenefeld (Germany), Dusseldorf Weeze (Germany), Bratislava (Slovakia), Eindhoven (The Netherlands), Malmo (Sweden) and from fall 2017 Stockholm (Sweden). Many world destinations can be connected over Zurich flight.



The airport is 4km away from the city center – important advantage of Nis, as many of the airports in Europe (especially in big cities) are located in a non-walking distance from the cities which presupposes additional expenses for travel, time resources, etc.

Apart from taxis, there are buses taking passengers from the airport to the city on regular basis (every 15 minutes from early morning till midnight on workdays).

- Railways:

Railway links include international trains from Thessaloniki, Greece to Ljubljana, Slovenia, via Skopje, Niš, Belgrade and Zagreb, as well as Istanbul, Turkey - Vienna, Austria via Sofia, Niš, Belgrade and Budapest. Another important railway link is the one to Bar, Montenegro, which connects Niš with the Adriatic sea

However, there are some deficits related to the service which prevent passengers from active exploitation: insufficient speed, low-maintenance when it comes to internal conditions, limited modernization activities, etc.

Similarly to the airport, the train station is 2Km west of the main square which is a factor of importance for the overall convenience of the visitors.

- Other options - car and bus:

The European motorway E75 routes through Niš. From the north, visitors may use any highway from the Hungarian border over Novi Sad and Belgrade to Niš. From the northwest, they can travel over Austria, via Slovenia and Croatia to Belgrade and then to Niš. These are all modern highways, including the section Belgrade-Niš. It is a fast road with six lanes and 120km/h speed limit in favourable condition.

Regarding point ii) the concept of “accessible tourism” representing the ongoing endeavour to ensure tourist destinations, products and services are accessible to all people, regardless of their physical limitations, disabilities or age,

Nis has to dedicate more efforts for active compliance as the current infrastructure cannot be defined as satisfactory in terms of accessibility,

despite the progress made during the recent years. The concept need to be incorporated more constructively in strategic documents on local and national level and actions shall be taken in order to ensure its applicability and active implementation. Furthermore, the dynamics of the social dialogue towards the topic has to be enhanced, allowing more people to engage purposefully in the problematic, thus strengthening their civil position and role in the society.



- Attractions

The second criterion is directly related to the existence, maintenance and development of natural and cultural resources, situated in the particular area; it involves opportunities for meaningful distribution of the visitors' time and is one of the most important factor for their overall evaluation of stay, incorporating elements such as: availability, location, access, price-quality-ratio, etc. Furthermore, the criterion implies a certain responsibility in the context of the global situation towards the exploitation manner of natural and cultural heritage and strongly focus on sustainability as a rightful framework for tourism development.

Definition:

Sustainable Tourism involves social responsibility, a strong commitment to nature and the integration of local people in any tourist operation or development. Sustainable tourism is defined by the World Tourism Organisation (WTO), the Tourism Council (WTTC) and the Earth Council as:

“Sustainable Tourism Development meets the needs of present tourists, host regions while protecting and enhancing opportunity for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems. Sustainable tourism products are products which are operated in harmony with the local environment, community and cultures so that these become the beneficiaries not the victims of tourism development.”

The city of Nis as natural, social and cultural centre in the southeast of Serbia is characterized by a rich variety of attractions, which is one of the reasons for its high development rate during the years – tourism is an important factor for the socio-economic status of an area. The city offers content of solid quality, example of which are the opportunities for sightseeing, various tours, cultural manifestations and events, satisfactory quality of services and competitive price. As stated above, important advantage of the city of Nis is the international airport Konstantin Veliki.

Some of the most important attractions located on the territory of Nis are:

- **Mediana** – a large 4th-century Roman estate;
- **Niš Fortress** – the best-preserved Turkish fortress in the central Balkans, built in 1723 and containing the remains of Roman Naissus in its foundations;
- The **Skull Tower** (Ćele Kula);



- **Čegar**, where a monument stands on the site of the battle between Stevan Sinđelić and the Turks;
- The **Monument to the Liberators of Niš** – erected in 1937 in memory of the fight for the liberation of Niš;
- the **Red Cross Camp** – a Nazi concentration camp;
- **Bubanj Memorial Park** – one of the largest Second World War execution sites in Serbia.

Picnic sites in the surroundings of Niš include the **Sićevačka Klisura gorge** – a 16 km-long protected natural feature with rare plants and animals; the **Jelašnička Klisura gorge** – a special 2 km-long nature reserve with waterfalls and rare plants and animals; the **Bojanine Vode** holiday resort; **Kamenički Vis** – a holiday resort with winter sports facilities; and **Cerjanska Pećina cave**, 4 km long, with spacious chambers beautifully decorated in cave formations (stalagmites, stalactites, etc.).



“Serbia's third-largest metropolis is a lively city of curious contrasts, where Roma in horse-drawn carriages trot alongside new cars, and posh cocktails are sipped in antiquated alleyways. It's a buzzy kind of place, with a high number of university students, packed-out laneway bars, a happening live music scene and pop-up markets and funfairs come summertime.”⁵

The favourable climate further contributes to the high popularity of the Serbian city and is of assistance for the maximization of the natural and cultural resources:

Average annual temperature in the area of Niš is 11.9 °C (53.4 °F). July is the warmest month of the year, with an average of 22.5 °C (72.5 °F). The coldest month is January, averaging at 0.6 °C (33.1 °F). The average of the annual rainfall is 580.3 mm (22.85 in). The average barometer value is 992.74 mb. On average, there are 134 days with rain and snow cover lasts for 41 days.

The city also provides opportunities for active cultural activity as a theatre with various performances is present: Niš is a home of the National Theatre in Niš, that was founded as "Sinđelić" Theatre in 1889, as well as a music festival of high attendance which is gaining more and more popularity

⁵ Niš travel - Lonely Planet



among national and international citizens: from 1981 Niš is the host of Nišville International Jazz music festival which begins in mid-August and lasts for 4 days.

However, for the successful positioning of the city of Nis tourism destination, a necessity for advancement of the quality of the tourism offer is needed in terms of legislation and public-private partnerships; the abundance of natural and historical sites creates a horizon for constructive utilization and provides opportunities for individual and communal growth, **but their low international recognisability affects negatively the capitalization of the resources available.** Furthermore, better coordination between the stakeholders is required as a prerequisite for balanced and sustainable development; stated priorities and strategic evaluations are existent, but more efforts need to be focused towards their detailization and logic of connectivity – a clear development program regarding tourism development in compliance with the sustainable tourism rationale (promoted by the European Institutions) shall be elaborated in order to avoid fragmentarity of the efforts and to provide coherence with the international standards.

Also of significant importance is the support of the local community regarding the undertaken course of tourism development in the area – seminars, awareness raising initiatives and campaigns on the topic need to be incorporated in the social life so that the citizens have the necessary information in order to form a position to be respectively heard and taken into consideration by the relevant authorities.

Regarding the low recognisability, **a modern and inclusive marketing approach needs to be elaborated**, in compliance with the established international norms, in order to be improved the general performance of the tourist sector and to contribute to the formation of a resilient image of Nis as a distinguishable tourist destination.

- Staying conditions

“Accommodation and local food play a critical role in shaping international visitors’ quality of experience at a destination, along with other key influential tangible and intangible factors (safety, environment, locals hospitality...)”

The staying condition criterion consists of the different services and products provided for the domestic and foreign tourists at a certain destination; it includes: location, parking space, extra fees, number of stars, facilities, accuracy of the information, reviews, feedback, etc.



Cities	2012	2013	2014	2015
Belgrade	172,088	164,054	155,977	157,245
% change		-4.67	-4.92	0.81
Novi Sad	46,361	44,307	53,872	61,489
% change		-4.43	21.59	14.14
Niš	29,847	29,927	31,297	34,924
% change		0.27	4.58	11.59
Other	342,220	314,810	297,784	333,782
% change		-8.01	-5.41	12.09

Source: Statistical Office, Press, 2013, 2014, 2015, 2016

Arrivals in major cities (in thousands)

The structure of accommodation facilities or their capacities has changed over the past few years. There have been dynamic developments in the offer of hotel-type accommodation facilities, primarily in the category of 4* hotels. Compared to 2005, the share of major hotel brands increased (Radisson Blu, Crowne Plaza, Luxury Collection - Starwood, Falkensteiner, Holiday Inn, Best Western), mostly in Niš, Belgrade, Subotica and Novi Sad.

According to the Ministry of Tourism, at the end of 2015, there were 358 categorised facilities for hotel-type accommodation (including garni and aparthotels), motels, boarding houses and tourist and apartment complexes (excluding private houses, rooms, rural tourism households, hunting villas and camps). These facilities had a total of 18,244 and 30,417 accommodation units and beds respectively.

In the area of Niš there are many accommodation options –hotels, hostels, sanatoriums, Airbnb's with extensive bed base and equipped with all facilities needed for a qualitative stay; however **their most tangible advantage is the competitive prices** – when in comparison with other European countries, but when it comes to neighbouring ones, *there is a similarity of the offer in terms of price, which makes evident that the particular advantage itself is not enough to stimulate tourist interest and defines a necessity for a more innovative approach, able to distinguish the accommodation capacity of Nis and to make it attractive on the domestic and international market.*

According to a Eurostat survey, accommodation is an important component of the visit to another country and one of the main reasons which defines their willingness to come back to the particular areas.



Q7T Which of the following would make you go back to the same place for a holiday? Firstly? And then?
(% - EU)

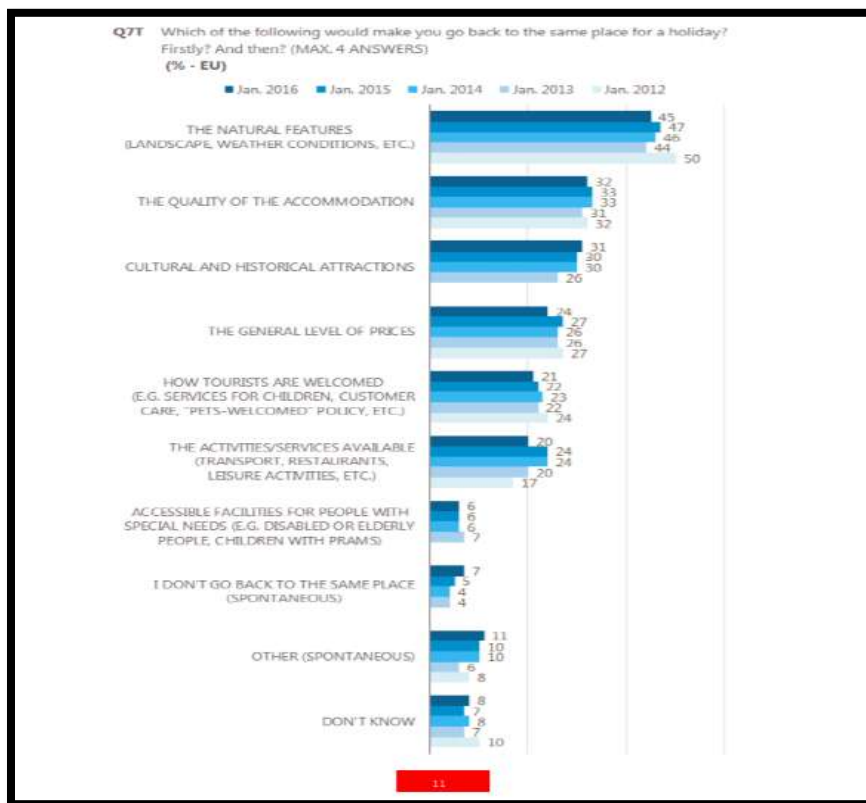
	The natural features (landscape, weather conditions, etc.)	The quality of the accommodation	Cultural and historical attractions	The general level of prices	How tourists are welcomed (e.g. services for children, customer care, "pets-welcomed" policy, etc.)	The activities/services available (transport, restaurants, leisure activities, etc.)	Accessible facilities for people with special needs (e.g. disabled or elderly people, children with prams)
EU28	45	32	31	24	21	20	6
Age							
15-24	50	34	38	29	22	29	3
25-39	46	34	32	29	26	24	6
40-54	47	34	30	26	24	19	6
55+	42	28	27	17	16	14	6
Education (End of)							
15-	34	25	18	17	15	12	7
16-19	44	34	28	24	22	18	6
20+	49	33	35	25	23	20	5
Still studying	51	33	39	29	24	31	3
Respondent occupation scale							
Self-employed	48	34	30	26	23	20	4
Employee	48	37	33	28	25	23	5
Manual workers	49	29	27	27	22	20	5
Not working	43	28	29	20	18	17	7

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Nearly half of the respondents (45 %) answered that the natural features of a holiday destination would persuade them to go back to the same destination. The next most significant factors mentioned were the quality of accommodation (32%) as well as quality of cultural and historical attractions (31%). Around a quarter of people said that the general level of prices (24%) would make them go back to the same place, closely followed by how tourists are welcomed (21%) and the activities or services available (20%).

Almost half of respondents in Austria (47 %) and over 4 in 10 in the United Kingdom and Belgium mentioned the quality of accommodation.

⁶ Source: Eurostat



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In the light of the mentioned statistics, it is important that the results are being taken into consideration when formulating a strategy for the tourism development of high relevance. Furthermore it is important to be stressed that statistics of such type (containing analysis of the views of EU-citizens) need to be prioritised as **the tourism activity in Serbia and Nis is primarily defined by tourists from the European Union**, along with neighbouring countries, as stated in the Tourism Development Strategy 2016-2025:

SORS data about the arrivals of foreign tourists in 2015/16 shows that, out of 1,132,221 total arrivals, the largest number of tourists arrived from: 1) Bordering countries and countries of the former Yugoslavia: 87,000 from Bosnia and Herzegovina, 70,891 from Bulgaria, 70,861 from Montenegro, 65,886 from Croatia and 65,754 from Slovenia; 2) **EU-28 countries, excluding Croatia and Bulgaria, where the highest number of arrivals was recorded from Germany 60,886, Romania 44,225, Italy 44,314 and Greece 43,869**; 3) Other European countries: Turkey 64,191, the Russian Federation 41,623 (a decrease of 17.8% compared to 2014).

⁷ Source: Eurostat



Nonetheless, special efforts should be dedicated for the digitalization of the tourist offer as the interest of the tourists towards the online methods has marked significant increase during the last years; people search for information before a trip, they compare prices and opinions, reserve hotels, tickets for shows, museums, give feedback, etc. This phenomenon becomes evident in different surveys, analysing the behaviour of the tourists and most importantly imposes new “rules” with which the tourist operators need to comply – an alteration of the marketing strategy is a demand that has to be met in order to generate favourable results.



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As a conclusion, it can be said that the city of Nis meets all three criteria for the quality of the tourist offer (used by the current analysis in accordance with its general aim without the pretention to be the only ones or the most legitimate ones in terms of accuracy) to some extent:

a) accessibility

- ◆ accessibility as constructed proper infrastructure, the city of Nis can be placed in average to high level of compliance with the requirement as it possess functioning infrastructure, **although efforts need to be directed towards its modernization;**
- ◆ regarding the concept of “accessible tourism” Nis has to dedicate more efforts for active compliance **as the current infrastructure cannot be defined as satisfactory in terms of accessibility, despite the progress made during the recent years.** The concept need to be

⁸ Source: Eurostat



incorporated more constructively in strategic documents on local and national level and actions shall be taken in order to ensure its applicability and active implementation;

b) attractions

Nis has a rich variety of natural and cultural resources, which attract many tourists on a regular basis, however,

- ◆ their low international recognisability affects negatively the capitalization of the resources available;
- ◆ better coordination between the stakeholders is required as a prerequisite for balanced and sustainable development;
- ◆ stated priorities and strategic evaluations are existent, but more efforts need to be focused towards their detailization and logic of connectivity;
- ◆ local citizens are not engaged enough in the tourism problematic which obstruct them from being active agents in the development of Nis as a recognizable tourist destination;

c) staying conditions

In the area of Niš there are many accommodation options –hotels, hostels, sanatoriums, Airbnb’s with extensive bed base and equipped with all facilities needed for a qualitative stay; however their most tangible advantage is the competitive prices – when in comparison with other European countries, but when it comes to neighbouring ones, there is a similarity of the offer in terms of price, which makes evident that **the particular advantage itself is not enough to stimulate tourist interest and defines a necessity for a more innovative approach, able to distinguish the accommodation capacity of Nis and to make it attractive on the domestic and international market.**

Furthermore, a strategy for the digitalization of the tourist offer is strongly needed.

Cultural tourism in Nis – overview (resources, interest to the sites, management)





Cultural tourism is the subset of tourism concerned with a traveller's engagement with a country or region's culture, specifically the lifestyle of the people in those geographical areas, the history of those people, their art, architecture, religion(s), and other elements that helped shape their way of life.

Cultural tourism includes tourism in urban areas, particularly historic or large cities and their cultural facilities such as museums and theatres. It can also include tourism in rural areas showcasing the traditions of indigenous cultural communities (i.e. festivals, rituals), and their values and lifestyle, as well as niches like industrial tourism and creative tourism.

It is generally agreed that cultural tourists spend substantially more than standard tourists do. This form of tourism is also becoming generally more popular throughout the world, and a recent OECD report has highlighted the role that cultural tourism can play in regional development in different world regions.

Cultural tourism has been defined as 'the movement of persons to cultural attractions away from their normal place of residence, with the intention to gather new information and experiences to satisfy their cultural needs'. These cultural needs can include the solidification of one's own cultural identity, by observing the exotic "others".

Analysis of the resources for the development of cultural tourism in the city of Nis:

- an attractive destination for people with an interest in history and culture;
- the resources for the development of cultural tourism in Nis include: archaeological, architectural, ethnological, religious sites, historical sites as well as cultural institutions - museums, galleries, community centres, theatres, etc.
- preserved ethnographic heritage;
- rich cultural calendar, crafts, festivals, ancient traditions and customs that are practiced to this day, forms of different traditional and contemporary cultural events related to the intangible heritage and modern culture;
- Competitive prices;

In the cultural calendar of Niš important place is being taken by Nishki Music Festival "Nishvil" - a jazz festival, festival of new urban songs and romances; "May Song" - designed for children's songs, International Ethnic Festival, the celebration of the city, which since 2002 is celebrated on 3 June and celebrated with religious, musical and sporting events celebrating the birthday of the most famous man born in Nis - King Constantine and his mother Queen Elena.



A special place in the cultural calendar is held by the Book Fair. The Book of Columns in Sichevo is an invitation to exchange thoughts, feelings and friendship, made by the avant-garde artist, a great national hero and founder of Horo of Serbian sisters Nadezhda Petrovich. This is the oldest picturesque colony on the Balkans, founded in 1905 and restored in 1964.

Some of the most significant cultural places of value in the city of Nis are:

- ❖ **Mediana** (4th cent.)- Birthplace of Emperor Constantine the Great. This ancient historical site on the road Niš - Niška Banja (Spa) is a testimony of the wealth and glory of the imperial Naissus . The remains of imperial palace, together with peristyle (range of surrounding columns) have been discovered. Luxury villas with mosaic floors, sacral objects (baptistry room), farming buildings with pithos, Roman bathrooms, water tanks, fort remains etc. testify about Naissus culture and wealth from the times of Emperor Constantine the Great, who was born in Nis.
- ❖ **Skull Tower** (19th cent.). Skull Tower (Cele kula) was built by the Turks from the skulls of the Serbs killed in the battle of Cegar, near Nis, in May 1809. It is of rectangular shape, about 3 m high and was built from quicklime, sand and the skinned skulls, upon the order of Khurshid Pasha who had first sent the skulls filled with cotton to the Sultan in Istanbul. Each side of the Tower has 14 rows with 17 openings where the skulls were embedded. There were 952 skulls, but today only 58 have remained. The rest were pulled out to be buried or were lost in time. In 1892 a chapel was built around the Tower, according to the design of the Belgrade architect Dimitrie T. Leko. The skulls are situated inside the small chapel consisting of four glass walls.
- ❖ **Niš Fortress** (18th cent.). On the Nišava riverbank, over the remains of a Roman military camp, then Roman town called Naissus, and finally the remains of a destroyed Byzantine fortification, the Turks built a strong fortress at the beginning of 18th century. The construction of this fortress lasted from 1719 to 1723. It was built with the help of local laborers, Istanbul stonecutters and bricklayers. Beside those well saved walls and gates, numerous facilities remain from various periods, such as the armory, Turkish steam bath, Turkish post station, Bali-mosque, powderroom and prison.
- ❖ **Rusalia Church** (11th cent.). Church of Holy Trinity of Rusalia is located above the village of Gornji Matejevac. Rusalia is the most attractive ancient structure in Niš. The church was built after the order of a local Byzantine dignitary in the first half of 11th century.
- ❖ **Kazandzijsko sokace** (Tinkers alley-18th cent.). This is an old urban quarter in what is today Kopitareva Street. It was built in the first half of 18th century. It was a street full of tinkers and other craftsmen, together with their houses coming from Turkish period. Unfortunately,



only some of those are preserved today and protected by the state. The street has recently become packed with cafes, a favorite site for the visitors.

- ❖ **Niška Banja or "Niš Spa"** is located a couple of kilometers to the southeast. There is a large park and some restaurants to accompany the nice view out over the valley. The spa is famous for its mildly radioactive hot water springs which help treat rheumatic disorders. Heart conditions are also successfully treated in the vicinity. 5km away from the spa, one reaches Sicevacka and Jelasnicka Gorges, state-protected natural reserves with intact scenery, ancient monasteries, and endemic species.
- ❖ **Mausoleum of Count Alexei Kirillovich Vronsky** - lover of Anna Karenina (19th cent.). The Holy Trinity Church in Gornji Adrovac (municipality of Aleksinac) near Nis was built in commemoration of the death of Nikolai Rayevsky. Rayevsky was celebrated as Count Vronsky in Tolstoy's famous novel Anna Karenina.
- ❖ **Red Cross Concentration Camp.** The first Nazi concentration camp in the former Yugoslavia, constructed in 1941. One of the few fully preserved concentration camps in Europe, almost intact since 1944, 'Lager Nis' was the venue of the dramatic escape in February 1942 when about 100 prisoners managed to flee . It is located in the city center, close to the central bus station.

Adventure tourism in Nis – overview (resources, interest to the sites, management)



Adventure travel is a type of niche tourism, involving exploration or travel with a certain degree of risk (real or perceived), and which may require special skills and physical exertion.



Adventure tourists may have the motivation to achieve mental states characterized as rush or flow, resulting from stepping outside their comfort zone. This may be from experiencing culture shock or by performing acts requiring significant effort and involve some degree of risk (real or perceived) and/or physical danger (See extreme sports). This may include activities such as mountaineering, trekking, bungee jumping, mountain biking, cycling, canoeing, scuba diving, rafting, kayaking, zip-lining, paragliding, hiking, exploring, sandboarding, caving and rock climbing. Some obscure forms of adventure travel include disaster and ghetto tourism. Other rising forms of adventure travel include social and jungle tourism.

Analysis of the resources for the development of adventure tourism in the city of Nis:

- an attractive destination for people with an inclination for adventure ;
- the resources for the development of adventure tourism in Nis include: rivers, mountains, lakes, waterfalls, forests, cliffs, etc.;
- the activities available, related to the development of adventure tourism include, but are not limited to: hiking, biking, kayaking, rafting, shooting, jeep safari;
- Competitive prices;

Some of the most significant natural resources for the development of adventure tourism in the area are:

◆ Suva Mountains

Suva Mountain is located in south-eastern Serbia, 45 km long and 15 km wide. It starts to the east of Nis and ends southwest of Babushnica in the Luzhnikata valley, where the Lužnica River flows. When you go to the valleys of Suva Mountain, you must carry bundles of water. The mountain is called Suva, because there are no springs on its peaks. The tops that can be climbing are called Trem - the highest point of the mountain and the Devil's Grave. By marked trails you will reach Sokolov stone, and here is the resort Boyana water, where, as the name says, there is a spring. In the winter, ski slopes can be found in this ski resort, and there are also two children's runs.

◆ The Sićevo Gorge

The **Sićevo Gorge** is the narrow part of the Nishava valley between the villages of Prosek and Ravni up to 14 km upstream from Nis. It is about 15.9 km long and is part of the Nile Valley along with the Bella Palanka Valley. The gorge is divided into two parts, upper and lower, or the Chernivtsi -



Gradishte and Ostrovikka gorges. The upper part is narrower and more like a canyon, while the lower part has wide slopes. The gorge is surrounded by the Mount Mountains to the north and the slopes of Suva Mountain in the south. The gulf provides good conditions for hiking and paragliding. The ideal time to visit because of the almost Mediterranean climate is spring and autumn and even winter when there is not much rainfall.

Sichevska Gorge is an imposing part of the canyon of the river Nishava. It is located on the road SofiaNish, where the last slopes of the Mountains of the Mountains and Suva Mountains end. It is 14 km from Nis. It is 17 km long and is divided into two parts - upper and lower gorge. There are two HPPs built at the beginning of the 20th century in the gorge. One of them still supplies Nis with current. Other important sites in the gorge are the church "St. Petka "in the nearby village of Ostrovitsa and Sichevo monastery" St. Virgin Mary "(built in 1644 and rebuilt in 1875 after being destroyed by the Turks), which is near the road to Sofia

The village of Sichevo is also known for its vineyards and good wines. Every summer here is organized the oldest art colony on the Balkans, founded by the artist Nadezhda Petrovich. Because of the numerous natural features and the rare plants that grow here, Sichevska gorge in 2000 was declared a special nature reserve. Salvia, a very valuable and curative herb, which grows only under Mediterranean conditions, has found in Sichevska gorge its only habitat on the territory of Serbia. Sports enthusiasts can practice mountaineering, nature walks, fishing, rafting (2009 in this part of Nishava is organized World Race Championship) and hang gliding.

◆ Yelashnichka Gorge

Yelashnichka Gorge is 15 km from Nis and 3 km from Nishka Banya. Although small, it has been declared a special nature reserve and there are some nice places for camping and picnic. One of them is located at the exit of the Gorge and is equipped with benches, and there are marked paths for hiking. A narrow road passes through the Yelashnichka Gorge which leads to Boyana Water, a resort of Suva Mountain. The Nis climbing club has made it possible to climb a natural climb with certified equipment where climbers can climb everyone under the supervision of the members of the club. Apart from the beautiful rocks, the Ripalka Falls are also interesting, as well as remains of Roman fortifications. It is located between the villages of Yelashnica and Chuklenik, which are connected to the city by bus lines.

◆ Kamenički vis

Kamenički vis is a favorite place for day trips to the citizens of Nis throughout the year. It is situated among the folds of the Mountains of Ore Mountains, above the village of Kamenitsa, where its name



comes, at an altitude of 750-800 m. It is 14 km from the city. The terrain is slightly shaped and is covered with low forest vegetation. In the northern part is Studen Kladenets - the only source in the vicinity. In the area you can refresh yourself and enjoy hunting specialties in the hunting restaurant.

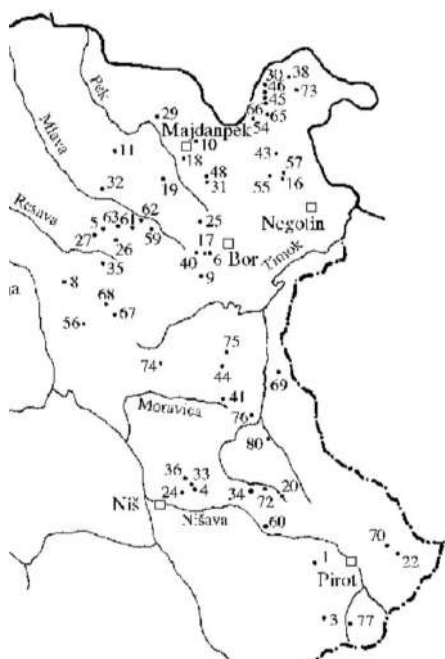
◆ Boyanine Water

The Boyanine Water is located 25 km from Nis. This 700-1300 m above sea level, with its geographic location in the northern part of Suva Mountains, is an oasis of the sun and the fresh, fresh mountain air. The name of the area comes from the spring of pure mountain water "Bojanine Lead". Immediately to the spring there is a mountain house Studenets (55 beds), at an altitude of 860 m, and Ski-house "Nis" (20 beds), at an altitude of 810 m, with the attractive "Orlova fountain" and illuminated basketball court. For mountaineers from Boyanine there are a number of marked hiking trails leading to the beautiful hills in the vicinity, such as Sokolov stone (1523 m), Devil's grave (1317 m), Mosor (984 m) and the highest peak of Suva mountain - Trem 1810 m above sea level). During the winter of Boyaninje, ski can be crossed on the ski slopes "Sokolov Kamen", as long as it is accessible by lift, 900 m long, displacement 320 m and capacity 1100 skiers per hour. The main runway is 1000 meters long. There is also a lighter and shorter ski lane (250 m) designed for school-aged children and amateurs. For the youngest is the track "Studenets" (100 m), with a motorized ski lift. Both playgrounds are illuminated.

Speleology Tourism in Nis – overview (resources, interest to the sites, management)



Speleology is the scientific study of caves and other karst features, their make-up, structure, physical properties, history, life forms, and the processes by which they form (speleogenesis) and change over time (speleomorphology). The term speleology is also sometimes applied to the recreational activity of exploring caves, but this is more properly known as caving or potholing, or (not usually by participants) by the largely obsolete American term spelunking. Speleology and caving are often connected, as the physical skills required for in situ study are the same.



Caving as a tourist offer is focused on the tourists with a great love for the study and teaching of underground karst phenomena such as caves and pits, as well as unusual and rare plant and animal species. Cavers making plans based on the measurement of dimensions and providing cave channels, as well as documentation of morphological, hydrological, geological and physical properties. Given the activity of cavers to deep and complex holes and special caving techniques and training caving team, we can say that part of caving activities like mountain climbing and can be considered a sport activity. For the purposes of tourism, caves and pits are often tailored to the tourists so that tourists, if they decide to speleological research or I visit some of the caves or cave, often go accompanied by guides who are trained to navigate the

caves that tourists do not get lost or jeopardized. Known caves often have other tourist offer such as souvenir shop, a place for a meal or refreshment.

Nature has given caves in Serbia the most extraordinary shapes showing its infinite imagination. Most of them can be found in the eastern part of the country.

The majority of caves are located in Eastern Serbia, seven of which are prepared for organized tourist visits, while several caves are destined for more extreme adventurers offering the true speleological tours with guides and necessary equipment.

The longest caves in Serbia are the Lazareva cave near the city of Bor (9000 meters), Ušački cave system (6,185 meters) and **Cerjanska cave near the city of Niš** (6,025 meters).

Cerjanska Cave is located 14 km away from Nis, close to the Kamenica Hill excursion site. The entrance to the cave is set near the spot where the Provalijska river sinks into the ground, 515 meters above sea level. The cave is hydrologically active. Geologists estimate that the Cave of Cerje originated over 2 million years ago. The end of the cave remains undiscovered.

The cave abounds in cave formations throughout its length. It boasts a wonderful underground world made of corridors and large halls, on average 15 to 40 meters high, showing hundreds of morphological and hydrological forms of different shape, size, and color, cave jewelry – stalactites, helictites, wavy draperies, cave corals, and crystal flowers, which can be found only here in Serbia. Helictites found here represent a special kind of cave jewelry which, contrary to all laws of physics and gravity, extends in all directions, like electrified hair. In 1998, the Institute for the Protection of Natural Monuments proclaimed Cerjanska Cave a first category natural treasure. However, due to



the lack of funds, Cerje Cave is still not available for visitors. However, it is possible to visit the cave only with professional speleo guides and in the small groups.

Analysis of the resources for the development of cave (speleology) tourism in the city of Nis:

- Cerje Cave – first category national treasure, declared by the Institute for the Protection of Natural Monuments;
- Abundance in morphological and hydrological forms of different shape, size, and color, cave jewelry – stalactites, helictites, wavy draperies, cave corals, and crystal flowers, which can be found only in Serbia;
- Low funding, resulting in limited availability;
- Deficits of analysis, strategies and social consensus, favouring the development of the speleological resources and cave tourism in the region;

S.W.O.T analysis regarding the development of the tourism sector in the City of Nis with a focus on cultural, adventure and cave tourism

Strengths	Weaknesses	Opportunities	Threats
Favourable geographical location, defining the richness of natural resources	Serbia is not a member of the EU, which makes the travel more complex (limitation of stay, roaming charges, etc.) and reduces the opportunities for active presence of the Nis district in the European market	Active membership of the EU, which would lead to the elimination of the barriers, currently obstructing the more dynamic tourism development of the region (taking into consideration that eu-citizens represent a significant part of the tourists in the region)	Intensified tourist presence in result of the popularization of Nis as a tourism destination, which could lead to environmental issues, including pollution, alteration of ecosystems, pressure on the biodiversity, uncontrolled construction, etc.



<p>Resilient culture with variety of traditions and customs, able to attract visitors and to ensure consistency in their experience</p>	<p>Low recognisability and limited presence on the international market</p>	<p>Active exploration of the untapped potentials by comprehensive analysis of the international market and the tourists expectations, resulting in a thorough strategy for the popularization of the City of Nis (incl. implementation of a new marketing approach)</p>	<p>High level of commercialization, degradation of local identity and marginalization of the “essence” at the expense of the short –term intensification of tourists presence, resulting in immediate profits; loss of perspective and long-lasting vision</p>
<p>High accessibility by transport means: functioning airport, railway and road infrastructure</p>	<p>Limited destinations; regarding the railway transport: insufficient speed, low-maintenance when it comes to internal conditions, limited modernization activities; low culture of compliance with the established transport rules (speed infringements, etc.)</p>	<p>Improving the air infrastructure by launch of a new destinations and more direct flights; modernization of the existing trains and implementation of new services; better compliance with the established rules through more awareness raising campaigns or higher sanctions/new rules</p>	<p>Focus on the quantity instead of the quality; malpractices in terms of repair of the existing infrastructure or construction of new routes; unproportional development of the different transportation means on the expense of the others; dissatisfaction and public resentment towards the new rules, sanctions.</p>
<p>Competitive prices in comparison with cities in Northern and Western Europe</p>	<p>Prices similar to the ones in cities in Central and Eastern Europe, which circumstance deprives Nis of important advantage</p>	<p>Improving the quality of the tourist offer, active development of the natural and cultural heritage as factors with great significance among tourists (in accordance with Eurostat survey), so that the price factor is not the leading one</p>	<p>Artificial lowering of the prices, which can result negatively for the employees in the tourism sector and all other industries of relevance; improving the quality and the scope of the services, but not increasing the wages of the employees; implementation of short-</p>



			term strategies and loss of a long-lasting vision for development;
Unspoiled natural scenery	Not enough facilities available at the disposal of children, people with limited physical abilities and elderly; low compliance with safety standards in some areas	Improving the quality of the sites with facilities at the disposal of children, people with limited physical activities, elderly; enhancing the compliance with the safety standards and educating citizens and tourists on the topic of safety	Spoiling of the environment with view of immediate profits, unregulated construction work, unsystematic development without consideration of the future; marginalization of the concept of sustainable tourism
Diversity of the tourism product	low utilization of the available resources, ineffective marketing strategy, limitation of the reached people; insufficient rate of digitalization of the tourist offer	Elaboration of a competitive marketing strategy and promotional activities in compliance with the international standards; enhanced digitalization of the tourist offer, implementation of new online services of assistance to the tourists	Focus on a limited number of tourism types and activities – for example prioritisation of cultural tourism and neglecting of the speleology as the first one is considered most beneficial at the current stage and the latter require more systematic approach and allocation of financial resources
Rich cultural calendar, including musical and dance festivals, literature, crafts & arts and other events.	Language barrier, low popularity outside the borders of the city of Nis	Involvement of international artists in the different events, extensive promotional campaign, elaboration of logistics able to secure the quality stay of the tourists during the festivals; intensified dynamics of the	High incorporation of elements of other cultures and traditions, resulting in alteration of the specific characteristics of the events; loss of recognisability among the citizens of Nis, disruption of the



		communal life	dynamics of the communal life
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Analysis of the current condition and the perspectives for development of Montana Municipality (Republic of Bulgaria) as a tourist destination in the field of cultural, adventure and speleology tourism

The current analysis aims to present the actual condition and perspectives towards the development of cultural, adventure and speleology tourism, therefore is limited in content; however, the conclusions made can be of assistance for the general evaluation of the condition of the tourist product in Montana as the three areas subject to the analysis are part of a systematic whole, which presupposes certain repeatability of the pattern and provides space for an inductive reasoning, able to grasp the whole through establishment of a better perspective towards its integral elements.

Introduction:

The territory of Montana has a great potential for tourism development which can be synthesised in the existence of the following components:

- Mineral springs concentrated in its surroundings;
- A large part of the southern part of the area is occupied by Western Stara Planina - a naturally preserved and diverse environment with excellent conditions for mountain, eco, rural and hunting tourism;
- The Danube and its coastline as a natural resource for water, cruise and fishing tourism;
- The presence of many rivers and water basins (natural and artificial) and the second largest dam Ogosta;

However, **this does not necessarily mean that there are established conditions for offering of a comprehensive tourism products that are in correspondence with the visitor’s expectations towards the above-mentioned areas.**



The presence of various weaknesses and internal structural deficits provide for the unfavourable tourism reality and deprive it from the opportunity to reach its full capacity as a driving source of social-economic change; these include:

- Disproportion in the construction and concentration of the tourist base and resources;
- Dysfunctional regional infrastructures and insufficient use of the capabilities of modern technologies, information and reservation systems;
- Uncompetitive advertising model;
- Insufficient coordination at national, regional and local level, as well as impoverished dynamics of private-public partnerships in the sector;

With regard to the above, it can be said that the main constituents of tourism as both economic and non-economic activity – accommodation conditions, bed base, existence of natural and cultural resources, individual and collective motivation, etc. in Montana Municipality **does not function in the necessary level of proportionality and synchronicity**, therefore the industry is not capable to generate optimal results. The reasons for the mentioned phenomenon are various and complex and will be the main object of the current analysis

Location:

Montana District occupies the central part of Northwest Bulgaria with a total area of 3,635 sq. km, which is 3.2% of the territory of the Republic of Bulgaria. The northern boundary of the area is the Danube River, which is also a state border with Romania. In the southwest the area borders with Serbia, to the south it is surrounded by the northern slopes of the Balkan Mountains. Neighbouring area in the west is Vidin, in the eastern - Vratsa region and in the south - Sofia region.

According to NSI data from the 2011 census, 148,088 people live in the Montana region, which is 2.0% of the population of Bulgaria, **with a decrease in the number of inhabitants by about 5% compared to 2009 and by 11% compared to 2005**. About 64% of residents live in cities and 36% in villages. The density of the population is 43.2 people per square kilometre at the end of 2009, which is less than the reported population density in the area in 2005 - 45.9 people.



ОБЛАСТ: МОНТАНА (MON)

Показатели	Години				
	2012	2013	2014	2015	2016
1 Население към 31.12. - общо (брой)	143 662	141 596	139 350	137 188	134 669
2 Население към 31.12. - мъже (брой)	70 556	69 462	68 347	67 227	65 899
3 Население към 31.12. - жени (брой)	73 106	72 134	71 003	69 961	68 770

Source: National Statistical Institute

*Population – in general

*Population – man

*Population - women

By the table it becomes evident that the decrease in the population, stated above, **cannot be of accidental character and defined by situational randomness, but is rather a tendency with interconnected determinants** – from 2012 to 2016 there has been a significant negative fluctuation in the number of inhabitants in the area.

Montana District has a relatively well-developed road network. Its density is 0.292 km / sq. km with an average of 0.336 km / sq. km. Of great importance for the economic development of the area are the international road E-79 (Euro corridor №4) - road from the Regional road network I-1 Vidin-Montana-Vratsa-Sofia, which crosses the area and connects Western and Central Europe with Greece. A second-class road II-81 Lom-Montana-Berkovitsa-Sofia is also of great importance through the Petrohan pass, which connects the port of Lom with the international road E-79.

Population in the city of Montana, 31.12.2017

39 595: (m+f)	19 140 (f)	20 455 (m)
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Population in the city of Montana, 31.12.2011

43375: (m+f)	21367(f)	22008(m)
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According to the latest 2011 census data (incorporating the distribution of the population by ethnicity), the structure in Montana district is as follows:

1. Bulgarians: 38,278 (91.8%)



2. Roma: 3,055 (7.3%) -
3. Turks: 29 (0.1%)
4. Others: 166 (0.4%)
5. Indefinable: 171 (0.4%)
6. Undeclared: 2,082 (4.8%)

Regarding the population problematic, it is important to be noted, that the process of demographic ageing , namely the reduction of the the absolute number and relative share of the population aged under 15 and the increase in the proportion of the population aged 65 and over has been affecting Bulgaria with extreme rates during the recent years and have led to some negative consequences:

- Decreased participation rates (amount of people in the workforce)
- Increased dependency rates (ratio of older people to younger people)
- Increased fiscal gap (amount of money being spent by government on various sectors)

However:

Population ageing and urbanization are the culmination of successful human development during last century. They also are major challenges.(..) Older people in particular require supportive and enabling living environments to compensate for physical and social changes associated with ageing. This necessity was recognized as one of the three priority directions of the Madrid International Plan of Action on Ageing endorsed by the United Nations in 2002 (9).

<<Global Age-Friendly Cities>> Guidelines, The World's Health Organization

Furthermore, according to Directorate General Growth of the European Commission analysis the following hypothesis has been presented and then proved by statistics:

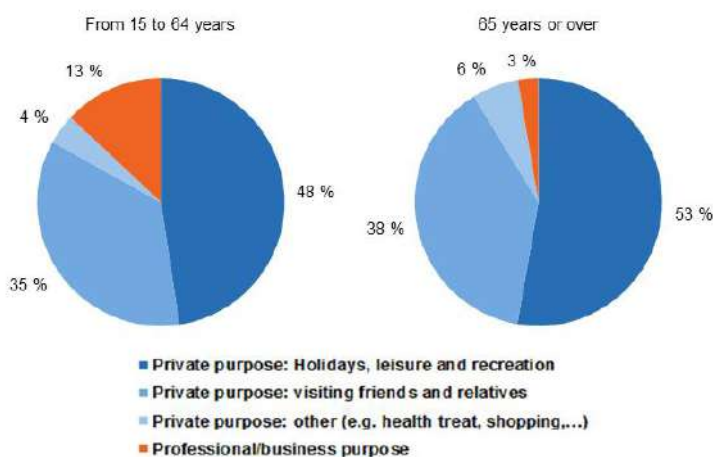
- Senior tourists make longer trips, preferably in their country or a neighbouring one (fact that should be viewed under the conditionality that there exist substantial heterogeneity in the preferences of the elderly in the different EU countries) and they are more inclined to direct the trip towards leisure and recreation, in contrast with the youth population (table 1) →

which implicates that i)a horizon for beneficial involvement of seniors in the social and economic reality of a country can be constructed, as long as there is a public will to do so and ii) the opportunities for meaningful engagement are mainly gravitating around the tourism industry.



With regard to the above, several important conclusions have to be considered:

- The ageing of the population – a worldwide acknowledged phenomenon – is in direct relation with tourism development and a factor, contributing to its positioning as a priority sector of local, national and international importance;
- It has the potential to impose some significant alterations in the tourist offer as relevant agents need to concentrate part of their efforts in designing services in high compliance with the demands of the elderly (as becoming integral component of the affirmation and development of tourism sector);
- Furthermore, it (the ageing phenomenon) possess the capacity to design a new, more balanced tourism reality as countries with competitive deficits (for ex. lack of resources for the development of adventure , disaster, business tourism) can transform itself into a favourable environment for senior citizens’ activity (more focus on cultural, culinary, etc. tourism) thus increasing their general social and economic condition;



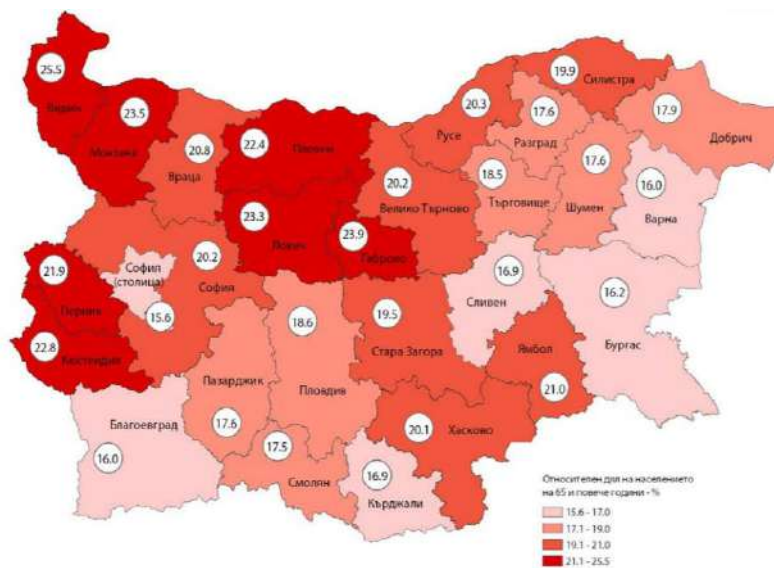
Note: EU-29 aggregate estimated for the purpose of this publication, using available data. Due to rounding, deviations can occur between total and subtotals

Source: Eurostat



	Domestic nights (%)		Average Length (nights)			Nights spent in non-rented accommodation (%)	
	15-64	65+	15-64	65+	7.0	15-64	65+
EU-28 ⁽¹⁾	56.7	65.6	5.1	7.0		47.1	54.4
Belgium	9.8	9.2	7.3	8.7		27.1	27.9
Bulgaria	75.7	73.9	4.4	5.8		37.6	68.3
Czech Republic	67.1	89.5	3.8	6.0		55.4	84.8
Denmark	51.6	63.4	3.5	3.8		55.9	56.9
Germany	40.8	45.0	5.5	7.6		31.9	29.9
Estonia	41.3	40.7	3.4	4.9		57.9	67.2
Ireland	27.1	26.8	5.2	6.1		34.0	45.5
Greece	86.9	92.5	8.8	17.6		75.4	89.3
Spain	84.0	93.9	4.5	7.2		64.5	79.6
France	80.3	84.8	5.3	7.6		56.8	66.4
Croatia	66.8	59.6	5.2	9.7		68.7	82.3
Italy	68.1	88.2	5.8	7.1		50.7	66.4
Cyprus	24.4	28.6	6.8	11.6		56.8	86.2
Latvia	50.1	55.1	3.6	5.0		65.6	77.5
Lithuania	36.3	47.9	4.4	4.5		52.1	75.4
Luxembourg	0.6	0.9	6.5	8.5		36.8	32.0
Hungary	56.7	84.6	3.8	4.2		54.1	74.0
Malta	16.2(u)	18.5(u)	5.5(u)	6.2(u)		23.2(u)	42.9(u)
Netherlands	35.0	40.4	6.0	7.7		23.4	27.0
Austria	34.1	40.2	4.9	6.4		25.9	23.6
Poland	62.4	71.6	5.5	7.3		50.1	68.2
Portugal	82.1	87.9	3.9	5.8		78.5	88.3
Romania	85.4	85.5	3.9	4.3		70.7	93.3
Slovenia	25.7	43.5	4.1	4.7		37.3	50.9
Slovakia	51.3	73.3	4.4	6.5		36.0	61.8
Finland	63.6	60.2	3.4	4.5		58.3	58.4
Sweden	57.4	48.8	4.3	5.4		51.8	58.8
United Kingdom ⁽²⁾	32.5	45.3	5.8	6.6		40.8	38.1
Switzerland	20.1	26.3	6.6	7.6		34.2	34.6

Source: Eurostat





Relative share of the population on the territory of Bulgaria + 65 years;

Source: Eurostat

When it comes to Montana, **the validity of the abovementioned circumstances is not applicable** as:

- ❖ The largest relative share of the population aged 65 and over in Bulgaria is in the 3 districts, **the second of which is Montana – 24 %**, which usually compromises the general economic reality of the district, however *can be mitigated if it weren't for the:*
 - Low incomes and predominant health condition that does not allow much social and/or travel activity (**elderly of Montana as a tourists in other cities/neighbouring countries**);
 - Lack of properly functioning tourism infrastructure, able to provoke interest to attract and comply with the demands of the visitors – youth and/or elderly (**Montana as a tourism destination**);

The concept the current analysis explore, is that a systematic approach consisting of consecutive and purposeful activities, if elaborated and followed by the relevant authorities and interested agents, has the full capacity if not to transform at once, at least to generate substantial situational improvement with the perspective of long-term positive alteration as Municipality of Montana possess one of the most important characteristics of a tourist destination – geographical location favourable for cross-border tourism (but not only) and a variety of natural and cultural resources.

The city of Montana, a regional centre in the Republic of Bulgaria, has an ancient history. The modern city bears the name of the Roman city of Montana, within the province of Dolna Mizia, which flourishes on the banks of the Ogosta river from the 2nd to the 4th centuries. The written sources for the history of this settlement are the epic monuments of the Roman era found in Montana and the surrounding area.



An important advantage of the area related to its location is the fact that two of the European transport corridors from the TINA network - Corridor № 4 (road E 79) Vidin-Montana-Vratsa-Sofia-Kulata (FP I-1) and corridor № 7 (the Danube) are routing through. Also, the shortest road from Vidin to Sofia passes through the territory of the Montana District - second-class road II - 81 through the Petrohan Stara Planina Pass.

The topography of Montana district is very diverse with northern part of the region situated in the Danube Plain and to the south - gradually turning into mountainous, covering parts of the Fore Balkan.

The southern parts of the area include the territory of the largest massive West Stara Planina mountain with the highest peak Kom 2 016 m. Here is the Petrohan saddle, through which passes the shortest road from Northwest to Southwestern Bulgaria. The slopes of Stara Planina are overgrown with deciduous and coniferous forests.

The climate is moderate continental, with cold winters and hot summers. Since the end of the 20th century, values of 35-40 ° C in the summer are common. Western and Northwest winds predominate, but it is not uncommon for the warm and pristine flora (also called southern), which leads to typical spring temperatures and snow melting. Arctic air masses also show values below -20 ° C. In the warm half-year (April-September) hailstorms are registered *which is a circumstance that generates negative results yearly for the socio-economic development of the region and needs to be addressed with better coordination and relevance of measures.*

The main rivers are Ogosta, Cibrica and Lom. They have small water quantities and practically have little relevance for irrigation. The Ogosta and Srechenska Bara dams and about 50 local dams are located on the territory of the Montana region.

The mineral springs are among the most valuable natural resources of the area. Hot springs in the Varshets municipality - Varshets and Spanchevtsi are used for the treatment of cardiovascular diseases, diseases of the central and peripheral nervous system, endocrine-exchange, of the locomotor system and others. Springs with hot mineral water, which may have a higher economic significance, are revealed in the village of Barzia, Berkovitsa municipality. There are also mineral springs in the villages of Borovtsi and Zamfirovo, but they are not used and practically have no application at the moment.

In general, the Montana region is characterized by the following natural-geographic conditions and resources, representing the potential for tourism development:

- ❖ Existence of mineral springs (in the municipalities of Varshets and Berkovitsa);



- ❖ A large part of the southern part of the area is occupied by Western Stara Planina - a naturally preserved and diverse natural environment and resources with excellent conditions for mountain, eco, rural and hunting tourism;
- ❖ The Danube and its coastline as a natural resource for water, cruise and fishing tourism;
- ❖ The presence of many rivers and water basins (natural and artificial) and the second largest dam Ogosta;
- ❖ In the area there are monuments of cultural and historical heritage - four monasteries of national importance, remnants of ancient fortresses, architectural masterpieces such as the clock tower in Berkovitsa and the houses ensembles in the town of Lom. Attractive for visiting, with great potential are the monasteries - Klisura Monastery "St. St. Cyril and Methodius "in Varshets municipality, Chiprovtsi monastery St. John Rilski, Lopushanski monastery St. John the Baptist in the village of Georgi Damyanovo, Dobritolski monastery Sveta Troitsa near Dobri dol, Lom municipality;



Quick overview →

Montana is a city located in North Western Bulgaria, which is a highly problematic region with identified issues:

- Depopulation of the North-western region, demographic collapse, high unemployment;
 - Insufficient foreign investment;
 - Low Competitiveness;
 - Lack of infrastructure provision;
- Business concentration in the capital of Bulgaria, which makes it hard for the provincial companies;
- Education: lack of relevant educational programme, lack of dual learning; lack of post-graduate qualification with specialized professional orientation;

The problems in the three areas that form Northwest Bulgaria - Vidin, Vratsa and Montana are reinforced by the fact that the Bulgarian population is decreasing and shifting- to Sofia and Western Europe, furthermore the standard of living has collapsed at a very low level. If the total population of the country has decreased by 4% compared to 2007 and by 10% compared to 2001, for Montana these values are respectively 6,5% and 8%, for Vratsa 11% and 22% and for Vidin - 12% and 24% respectively. The largest decline is in the working and educated population, which logically affects the economic capabilities of the region as well.

GDP per capita in North-western Bulgaria is one-third lower than the average in the country, and since 2000 the scissors have been spreading every year. The average wage is 20% lower than the country average, unemployment is higher, and investors typically surround the region. In relatively worst condition is the region of Vidin, where the poor reach almost 50% of the population and the average gross remuneration for years is the lowest in Bulgaria.

This closes a vicious circle - a lack of population, a lack of investment to create employment and raise income and a worsening of demography. What should be noted, is the long-term deterioration in the capabilities of this region. In all three areas - Vratsa, Montana and Vidin, the share of people with higher education is less than 20% of the working-age population. For comparison, in Plovdiv District a quarter of the people have graduated from university.

Paradoxically, some of the problems of the Northwest is related to its geography - although it lies between the deepest river in Europe and is a border with two states, the region remains "locked". This is true for many cities on the Danube plain as well as border regions - IME analysis shows that Silistra and Kardzhali have a similar problem.



Criteria for quality of the tourist product of city of Montana (incl. current tourist visits and interest to the sites, management, etc.) - current compliance, deficits and actions to be taken:

The city of Montana, unlike Sofia and Nis, **cannot be defined as a social, educational, economic and cultural centre** due to factors and reasons specified within the previous part of the analysis; however it unarguably possess high potential for sustainable development, which if explored right, can result in benefits of various character for the individual, the community and the country as a whole.

The tourism product of every destination can be defined as a cumulative effect of several important factors, which reflect the most substantial needs of the visitors and are responsible for the positioning of the destination in the international tourism niche:

- Criterion: Accessibility

The term accessibility can be interpreted in a dualistic way: i) accessibility as constructed proper infrastructure (such as railway and air connections), allowing the potential visitors to organize their time and resources in a predictable and reasonable manner and ii) referring to the concept of “accessible tourism” representing the ongoing endeavour to ensure tourist destinations, products and services are accessible to all people, regardless of their physical limitations, disabilities or age. It encompasses publicly and privately owned tourist locations.

Darcy and Dickson (2009, p34) :

Accessible tourism enables people with access requirements, including mobility, vision, hearing and cognitive dimensions of access, to function independently and with equity and dignity through the delivery of universally designed tourism products, services and environments. This definition is inclusive of all people including those travelling with children in prams, people with disabilities and seniors.

Compliance with the stated criterion:

Regarding point i) – accessibility as constructed proper infrastructure, the city of Montana can be placed in an average compliance with the requirement as it possess functioning infrastructure, although much efforts need to be directed towards its expansion and modernization.

- Air transport: not available
- Railways:



The city of Montana is connected with the country and by rail. The town is an intermediate railway station of the Boichinovtzi railway station - Berkovitsa.

However, there are **many serious deficits** related to the service which prevent passengers from active exploitation: insufficient speed, low-maintenance when it comes to internal conditions, limited modernization activities, etc.

The train station is close to the centre which is a factor of importance for the overall convenience of the visitors.

➤ Other options - car and bus:

The city of Montana is connected to the bigger towns in Bulgaria and the surrounding villages by bus transport. There are regular buses in the following directions: Sofia, Plevan, Lom, Oryahovo, Berkovitsa, Belogradchik, Varshets, Kopilovtzi, Ignatovo, Giurgich and others.

It is 114 km away from Sofia in the north direction, 38 km from Vratsa in the Northwest direction, 23 km from Berkovitsa in the Northeast direction and 102 km from Vidin in the Southeast direction. Montana is located on the road E79 (Vidin - Vratsa - Sofia - Kulata) and on the main road 81 (Lom - Sofia).

The overall state of the road network in the area is unsatisfactory and does not meet the modern requirements. The water transport in the area is represented by the port of Lom and local ports. Port Complex Lom EAD includes the ports of Lom and Oryahovo (Vratsa District) and realizes about 40% of the Bulgarian cargo traffic along the Danube. Port Lom is an element of Pan-European Transport Corridor VII - Danube River and is the second largest Danube port in Bulgaria.

Main retention factors for the development of tourism in the area are poor road access to tourist locations (Berkovitsa, Varshets, Chiprovtsi) through the Petrohan Pass and the lack of sufficient local initiatives and capital to promote the available resources and opportunities.

Regarding point ii) the concept of “accessible tourism” representing the ongoing endeavour to ensure tourist destinations, products and services are accessible to all people, regardless of their physical limitations, disabilities or age, Montana has to dedicate much more efforts for active compliance **as the current infrastructure cannot be defined as satisfactory in terms of accessibility and little progress is being made during the recent years.** The concept need to be incorporated more constructively in strategic documents on local and national level and actions shall be taken in order to ensure its applicability and active implementation. Furthermore, the dynamics of the social dialogue towards the topic has to be enhanced, allowing more people to engage purposefully in the problematic, thus strengthening their civil position and role in the society.



Table 2: Basis for comparison: socio-economic indicators for five Bulgarian cities 2017;

	Sofia	Plovdiv	Vratza	Montana	Vidin
Average annual household income per person (euro)	3757.45	2239.95	2324.82	2142.80	1752.69
Percent of the population living with material deprivation	19.20 %	33.90 %	41.80 %	21.60 %	39.60 %
Average annual salary	7429.51	4644.53	5282.62	4075.47	3584.63
Relative share of population aged 25-64 with higher education	51.40 %	25.20 %	19.20 %	18.50 %	16.40 %
Foreign direct investment in the non-financial sector per person (euro)	4685.26	1210.90	257.12	102.89	441.97
Disbursements under OPs to Municipalities per person (euro)	1282.79	533.63	714.36	603.67	576.99



- Attractions

The second criterion is directly related to the existence, maintenance and development of natural and cultural resources, situated in the particular area; it involves opportunities for meaningful distribution of the visitors' time and is one of the most important factor for their overall evaluation of stay, incorporating elements such as: availability, location, access, price-quality-ratio, etc. Furthermore, the criterion implies a certain responsibility in the context of the global situation towards the exploitation manner of natural and cultural heritage and strongly focus on sustainability as a rightful framework for tourism development.

Definition:

Sustainable Tourism involves social responsibility, a strong commitment to nature and the integration of local people in any tourist operation or development. Sustainable tourism is defined by the World Tourism Organisation (WTO), the Tourism Council (WTTC) and the Earth Council as:

“Sustainable Tourism Development meets the needs of present tourists, host regions while protecting and enhancing opportunity for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems. Sustainable tourism products are products which are operated in harmony with the local environment, community and cultures so that these become the beneficiaries not the victims of tourism development.”

The city of Montana is characterized by **a rich variety of natural and cultural resources**, although not explored relevantly, which is one of the reasons for its low development rates during the years – tourism is an important factor for the socio-economic status of an area. The city *has the potential* to offer content of solid quality, example of which are the opportunities for sightseeing, various tours, cultural manifestations and events, quality services and competitive prices, but currently does not meet properly the requirements of the market.

Some of the most important attractions located on the territory of Montana are:

- ❖ The Museum of History with more than 50 000 exponents;
- ❖ Kiril Petrov art gallery is known for its valuable works of art;
- ❖ The remains of the ancient fortress Monata which can be seen in the south- western part of the town perched on Kaleto/ Gradishteto Ridge, rising above the town;



- ❖ Ogosta dam, situated southwest of the town, 3,5 km from the Bistrilitsa village. It is one of the biggest dams in Bulgaria. The region hosts numerous private villas and is suitable for recreation and sports.;
- ❖ “St Yoan Predtecha Lopoushanski Monastery” (st John the Precursor) is 20 km in western direction of the town. The national writer and poet Ivan Vasov is known as a recent visitor of the monastery;

The natural and geographic conditions and the historical heritage of the Montana region **allow the development of various types of specialized tourism (eco, ski, cultural, rural, hunting and fishing and balneology)**. The suburban part of the area contains a number of tourist resources with a modest realization but a great potential for developing quality and attractive products especially in the field of rural and eco-tourism.

However, for the successful positioning of the city Montana as a tourism destination, a necessity for advancement of the quality of the tourism offer is needed in terms of legislation and public-private partnerships; the abundance of natural and historical sites creates a horizon for constructive utilization and provides opportunities for individual and communal growth, but their **low international recognisability (relatively similar to Nis) affects negatively the capitalization of the resources available**. Furthermore, better coordination between the stakeholders is required as a prerequisite for balanced and sustainable development; stated priorities and strategic evaluations are existent, but more efforts need to be focused towards their detailization and logic of connectivity – a clear development program regarding tourism development in compliance with the sustainable tourism rationale (promoted by the European Institutions) shall be elaborated in order to avoid fragmentarity of the efforts and to provide coherence with the international standards.

Also of significant importance is the support of the local community regarding the undertaken course of tourism development in the area – seminars, awareness raising initiatives and campaigns on the topic need to be incorporated in the social life so that the citizens have the necessary information in order to form a position to be respectively heard and taken into consideration by the relevant authorities. Furthermore, **by the development of an active tourism industry available working positions will be opened thus increasing the general employability of the population** and citizens need to be properly educated so to become an important part of the process, **both communally and individually advantageous**.

Regarding the low recognisability, a modern and inclusive marketing approach needs to be elaborated, in compliance with the established international norms, in order to be improved the general performance of the tourist sector and to contribute to the formation of a resilient image of Montana as a distinguishable tourist destination. However, **the marketing should reflect the reality in order to produce a lasting effect**; therefore it should come after the elaboration of a



comprehensive strategy for the sustainable development of the region and the necessary actions in this regard for maximization of the result.

- Staying conditions

“Accommodation and local food play a critical role in shaping international visitors’ quality of experience at a destination, along with other key influential tangible and intangible factors (safety, environment, locals hospitality...)”

The staying condition criterion consists of the different services and products provided for the domestic and foreign tourists at a certain destination; it includes: location, parking space, extra fees, number of stars, facilities, accuracy of the information, reviews, feedback, etc.

In August 2016 in the Montana region there were 27 accommodation places with over 10 beds - hotels, chalets and other places for short-term accommodation. The number of rooms in them is 592 of the beds - 1 189. Total number of nights spent in all accommodation locations registered during August 2016 was 10,793 or 27.2% more than in the same month of the previous year, **with overnight stays by Bulgarian citizens increasing by 36.5% and by foreign tourists - decreased by 39.3%** (Figure 1).

With the largest relative share of the nights spent by foreigners in the accommodation in Montana is Germany - by 17.7%, followed by Romania - by 11.1%, United Kingdom - by 7.1%, the Netherlands, France and China by 5.9%.

The arrivals at the places of accommodation in August 2016 are 3 791 people and are increased by 17.9% compared to the corresponding month of 2015. They achieved an average of 2.8 nights. Of all the overnights, 91.8% are Bulgarians, who achieved an average of 2.9 nights. Overnight travellers are 310 and have an average of 2.0 nights. Total bed occupancy in August 2016 is 29.3% and compared with the same month of the previous year increasing by 6.8 percentage points.



Фиг. 1. Реализирани нощувки в местата за настаняване в област Монтана по месеци

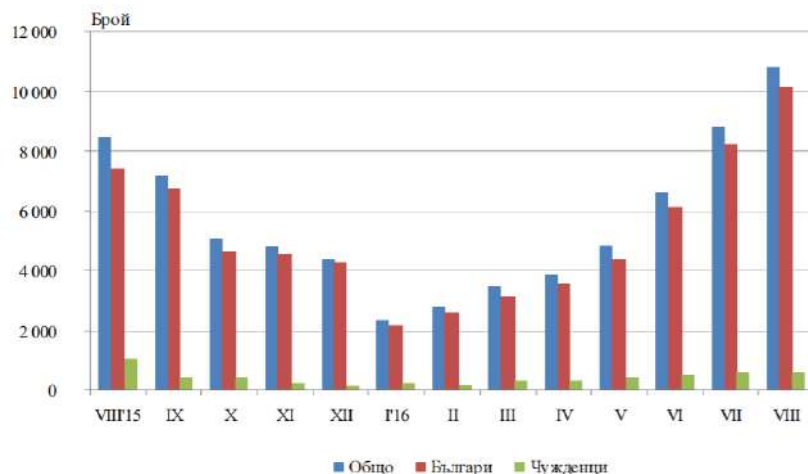


Figure 1. Total number of tourist nights realized in the accommodation base in Montana (in months)
Source: NSI

*in green – foreigners/ in red – Bulgarians/ in blue – in total

Revenue from accommodation in August 2016 in the area reached BGN 248.7 thousand or 12.4% more than in August 2015. **There has been an increase in the revenues from Bulgarian citizens with 27.7% and in the revenues from foreign citizens a decrease by 43.0%**

The settlements in the area are 130, of which 8 are cities: Montana, Lom, Berkovitsa, Chiprovtsi, Varshets, Vulchedrum, Boychinovtsi and Brusartsi. Eight of the eleven municipal centers are cities and three are villages - Yakimovo, Medkovets and Georgi Damyanovo.

The material base is concentrated in 3 municipalities - Berkovitsa, Varshets and Montana, which is explained by the rich resources, the built base and traditions in the tourism of these municipalities.

📍 In recent years, Varshets Municipality (more than 50% of visitors) **has been the most visited area in the region**, which can be explained with the specific resources (mineral springs) and good marketing, the renewed and newly built facilities and the increased role of balneology and spa procedures as a resource and a factor for the development of the tourism.

This process is a logical consequence in view of the natural assets and the historical development of the area over the centuries. The town of Varshets has grown around the thermal mineral springs and its history is related to the spa treatment. However, despite the improved results, **the share of the tourist area at national level remains too small.**



It can be said that in the district has been marked a partial improvement of the material base and the tourism infrastructure over the past few years. New tourist sites for shelter (albeit with small capacity) are created - houses for rural and eco-tourism in the mountain municipalities of Berkovitsa and Chiprovtsi – a good foundation that with proper marketing could be significantly upgraded and better exploited.

The most tangible advantage of the accommodation structure in Montana are the competitive prices – when in comparison with other European countries, but when it comes to neighbouring ones, there is a similarity of the offer in terms of price, which makes evident that the particular advantage itself is not enough to stimulate tourist interest and defines a necessity for a more innovative approach, able to distinguish the accommodation capacity of Montana and to make it attractive on the domestic and international market.

According to a Eurostat survey, accommodation is an important component of the visit to another country and one of the main reasons which defines their willingness to come back to the particular areas.

Nearly half of the respondents (45 %) answered that the natural features of a holiday destination would persuade them to go back to the same destination. The next most significant factors mentioned were the quality of accommodation (32%) as well as quality of cultural and historical attractions (31%). Around a quarter of people said that the general level of prices (24%) would make them go back to the same place, closely followed by how tourists are welcomed (21%) and the activities or services available (20%).

Almost half of respondents in Austria (47 %) and over 4 in 10 in the United Kingdom and Belgium mentioned the quality of accommodation.

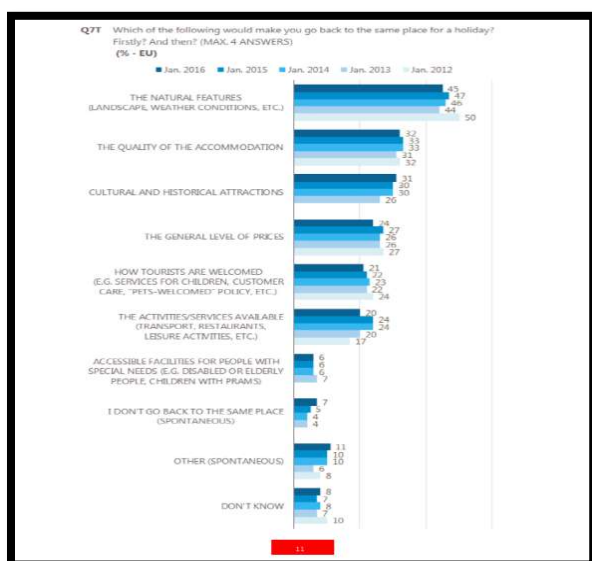


Q7T Which of the following would make you go back to the same place for a holiday? Firstly? And then?
(% - EU)

	The natural features (landscape, weather conditions, etc.)	The quality of the accommodation	Cultural and historical attractions	The general level of prices	How tourists are welcomed (e.g. services for children, customer care, "lets-welcomed" policy, etc.)	The activities/services available (transport, restaurants, leisure activities, etc.)	Accessible facilities for people with special needs (e.g. disabled or elderly people, children with prams)
EU28	45	32	31	24	21	20	6
Age							
15-24	50	34	38	29	22	29	3
25-39	46	34	32	29	26	24	6
40-54	47	34	30	26	24	19	6
55+	42	28	27	17	16	14	6
Education (End of)							
15+	34	25	18	17	15	12	7
16-19	44	34	28	24	22	18	6
20+	49	33	35	25	23	20	5
Still studying	51	33	39	29	24	31	3
Respondent occupation scale							
Self-employed	48	34	30	26	23	20	4
Employee	48	37	33	28	25	23	5
Manual workers	49	29	27	27	22	20	5
Not working	43	28	29	20	18	17	7

In the light of the mentioned statistics, it is important that the results are being taken into consideration when formulating a strategy for the tourism development of high relevance. Furthermore it is important to be stressed that statistics of such type (containing analysis of the views of EU-citizens) need to be prioritised as the tourism activity in Montana is primarily defined by tourists from the European Union, along with neighbouring countries, as presented previously in the paper.

In addition, special efforts should be dedicated for the digitalization of the tourist offer as the interest of the tourists towards the online methods has marked significant increase during the last years; people search for information before a trip, they compare prices and opinions, reserve hotels, tickets for shows, museums, give feedback, etc. This phenomenon becomes evident in different surveys, analysing the behaviour of the tourists and most importantly imposes new “rules” with which the tourist operators need to comply – an alteration of the marketing strategy is a demand that has to be met in order to generate favourable results.



9

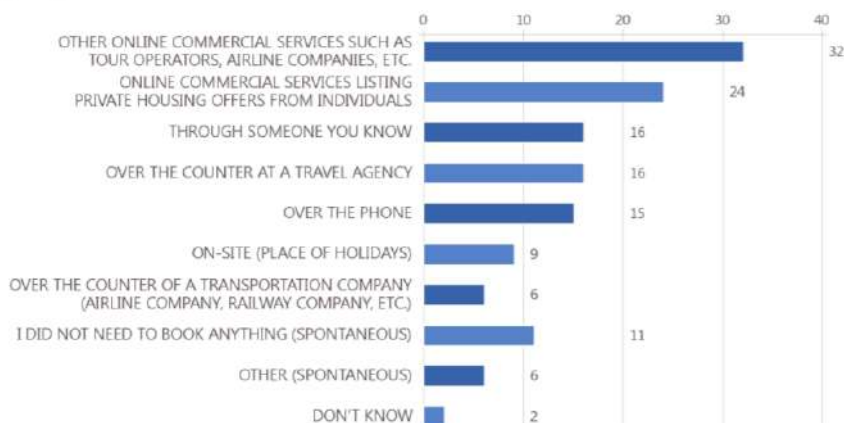
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⁹ Source: Eurostat



Q6 Did you book your holiday in 2015 by any of the following methods? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)



As a conclusion, it can be said that the city of Montana meets all three criteria for the quality of the tourist offer (used by the current analysis in accordance with its general aim without the pretention to be only one or the most legitimate one in terms of accuracy) **but under conditionalities**:

- With regard to the accessibility, functioning transportation system is existent, however it possess many integral deficits related to the quality of the service, which need to be properly addressed and eradicated as are a negative influence and an obstacle towards the affirmation of the city as a tourist destination;
- When it comes to the b) attractions and the c) staying conditions, Montana is evidently abundant in resources – natural and cultural as a necessary prerequisite for the development of a competitive tourist product; nevertheless **there is a serious discrepancy between the different constituents of tourism** as both economic and non-economic activity – accommodation conditions, bed base, existence of natural and cultural resources, individual and collective motivation, etc. therefore the industry is not capable to generate optimal results. **For example** the bed base is sufficient, but the services are in contradiction with the tourists expectations; the price is competitive, but the transport infrastructure is not reliable enough; there are many opportunities for the development of different types of tourism, but are not explored at all or relevantly, etc.



Cultural tourism in Montana – overview (resources, interest to the sites, management)



Cultural tourism is the subset of tourism concerned with a traveller's engagement with a country or region's culture, specifically the lifestyle of the people in those geographical areas, the history of those people, their art, architecture, religion(s), and other elements that helped shape their way of life.

Cultural tourism includes tourism in urban areas, particularly historic or large cities and their cultural facilities such as museums and theatres. It can also include tourism in rural areas showcasing the traditions of indigenous cultural communities (i.e. festivals, rituals), and their values and lifestyle, as well as niches like industrial tourism and creative tourism.

It is generally agreed that cultural tourists spend substantially more than standard tourists do. This form of tourism is also becoming generally more popular throughout the world, and a recent OECD report has highlighted the role that cultural tourism can play in regional development in different world regions.

Cultural tourism has been defined as 'the movement of persons to cultural attractions away from their normal place of residence, with the intention to gather new information and experiences to satisfy their cultural needs'. These cultural needs can include the solidification of one's own cultural identity, by observing the exotic "others".

Analysis of the resources for the development of cultural tourism in the city of Montana:

- The resources for the development of cultural tourism in Montana include: archaeological, architectural, ethnological, religious sites, historical sites as well as cultural institutions - museums, galleries, community centres, theatres, etc.;



- Rich cultural calendar, crafts, festivals, ancient traditions and customs that are practiced to this day, forms of different traditional and contemporary cultural events related to the intangible heritage and modern culture;
- Competitive prices, but insufficiency of accessible information regarding the sites;
- Low funding, resulting in limited availability and reduced international visibility;
- Deficits of analysis, strategies and social consensus, favouring the development of cultural tourism in the region;

In the area there are many monuments of cultural and historical heritage - four monasteries of national importance, remnants of ancient fortresses, architectural masterpieces such as the clock tower in Berkovitsa and the houses ensembles in the town of Lom.

Attractive for visiting, with great potential are the monasteries - Klisura Monastery "St. St. Cyril and Methodius "in Varshets municipality, Chiprovtsi monastery St. John Rilski, Lopushanski monastery St. John the Baptist in the village of Georgi Damyanovo, Dobritolski monastery Sveta Troitsa near Dobri dol, Lom municipality.

The register of the real estate monuments in the Montana region includes **282 sites, 29 of which are of national importance**. Archaeological finds and historical monuments, testifying to the ancient history of the area, are located on the territory of the region. These monuments are concentrated mainly in urban centers, heirs of ancient settlements and cultures

Some of the most significant cultural places of value in the district of **Montana that can be consolidated under an opportunity for joint cultural activity** are:

❖ The ancient city of Montanesio

It emerged as a military Roman camp on the remains of an ancient Thracian fortress in the first half of the first century AD. In the vicinity of the city is built a system of 25 fortresses, which serve to protect the local mining and gold mining in the upper stream of the Ogosta River. The foundations of two Roman villas near Montana were revealed. Inside the city there is an open-air museum collection "Lapidarium" - stone remains of buildings and temples found in the area. Marble Roman statues from antique Montana are exhibited at the National Archaeological Museum.

❖ The town of Berkovitsa



It is remarkable for the fortress "Kaletu", which is a symbol of antiquity and the Middle Ages, situated on three levels on the hill "Kaletu" near the town center. Monuments of culture of national significance are: churches "Nativity of the Virgin" and "St. Nikolay the Miracleworker"; the clock tower from the 18th century, the Ethnographic Museum and the Ivan Vazov House Museum from the beginning of the 19th century. The town has an art gallery and a small group of artisan craftsmen and craftsmen (potters, carvers and carpenters) who could build and build transfer their skills to tourists. There is an idea for building a street of crafts.

❖ Chiprovtsi Municipality

It is famous for its monastery "St. John of Rila", whose church is a monument of culture of national importance. The Chiprovtsi region is also famous for the works of the Chiprovtsi Carpet and Gold School, the Chiprovtska School from 1624, the Higher School - Seminary (more than three centuries ago), the remains of the Catholic Church, the Chiprovtsian pre-Renaissance art and architecture, but with a huge potential for developing tourism with appropriate socialization and marketing.

❖ Georgi Damyanovo

On the territory of Municipality Georgi Damyanovo are discovered remains of eight Thracian and late antique fortresses, as well as mines in the lands of some villages (Govedda, Dalgi del, Diva Slatina). Particularly attractive for visiting are many religious sites - Klisura Monastery "St. St. Cyril and Methodius" (Varshets municipality), Chiprovtsi monastery St. John Rilski, Chiprovtsi), Lopushanski Monastery "St. John the Baptist" (village of Georgi Damyanovo), Dobridolski monastery "Holy Trinity" near the village of Dobri dol, Lom municipality.

Cultural sites on the territory of the city of Montana:

- The Montana Museum of History

The museum in Montana was founded in 1951 to commemorate the September Uprising. Later, as a complement to its original purpose, the museum began collecting valuable artefacts related to the region's rich history. In 1991, it was declared a full-fledged museum of history.



The museum is divided into The Archeological Section, The Ethnography Section, a section on the history of Bulgaria from the 14th-19th centuries, two sections of Contemporary History, and a section called Undying Cultural Landmarks.

- Art Gallery "Kiril Petrov"

The gallery was founded in 1972. The collection, assembled for decades, keeps and popularizes artists from the mid-nineteenth century to the present day. Works of graphics, painting and small sculpture present different stages of the development of Bulgarian fine arts. Impressive with its artistic value is the collection of icons.

- The "St. St. Cyril and Methodius" Temple

The St. Cyril and St. Methodius Temple in Montana was built relatively late - in 1898 and impresses with its majestic stance. It is located next to Mihail's House. The temple is a cultural monument of local significance. The icons in it were made by Hristo Yanchev, and the iconostasis was created with plant, geometric and zoomorphic ornaments. The church is active and oftenly weddings are taking place there.

- The Mihail's House (Михайловата къща)

The site is the oldest architectural and construction monument preserved on the territory of the town of Montana. It is next to the St. Cyril and Methodius Orthodox Church and the Lapidarium Archaeological Exhibition. The ethnographic exhibition "The world of grandmother and grandfather" is arranged in the house, which presents the urban and rural life from the end of the 18th century and the beginning of the XX century.

The presence of these cultural monuments in the area allows for the development of a product or a "Cultural Park" route, which can also incorporate different types of natural sites which are definitive for the identity of the region.

The development of such "Cultural Parks" is a relatively new trend that has been made in recent years in the countries of the European Community, especially in regions experiencing economic difficulties.



The origins of the **concept** date back to the works of nineteenth century German geographers (Minca, 2001) and to the romantic will to see the monument in its original spatial context (Busquets, Cortina, & Anton, 2009). Carl Sauer offered the first **definition** of **cultural** landscape in his “Morphology of Landscape”: “the **cultural** landscape is shaped from a natural landscape by a **cultural** group. Culture is the agent, nature is the means, the **cultural** landscape is the result” (C. O. Sauer & Leighly, 1963 [1925]: 343).

Source: Cultural Parks and National Heritage Areas: Assembling Cultural Heritage, Development and Spatial Planning Hardcover – December 1, 2013; Pablo Alonso González.

Adventure tourism in Montana – overview (resources, interest to the sites, management)



Adventure travel is a type of niche tourism, involving exploration or travel with a certain degree of risk (real or perceived), and which may require special skills and physical exertion.

Adventure tourists may have the motivation to achieve mental states characterized as rush or flow, resulting from stepping outside their comfort zone. This may be from experiencing culture shock or by performing acts requiring significant effort and involve some degree of risk (real or perceived) and/or physical danger (See extreme sports). This may include activities such as mountaineering, trekking, bungee jumping, mountain biking, cycling, canoeing, scuba diving, rafting, kayaking, zip-lining, paragliding, hiking, exploring, sandboarding, caving and rock climbing. Some obscure forms of adventure travel include disaster and ghetto tourism. Other rising forms of adventure travel include social and jungle tourism.

Analysis of the resources for the development of adventure tourism in the city of Montana:

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The content of this document can in no way be taken to reflect the views of the European Union or the Managing Authority of the Programme.



- An attractive destination for people with an inclination for adventure; the resources for the development of adventure tourism in Montana include: rivers, mountains, peaks, waterfalls, cliffs, horse riding station, etc. The activities available, related to the development of adventure tourism include, but are not limited to: hiking, biking, riding, rafting;
- Competitive prices, but insufficiency of accessible information regarding the sites, routes, regulations, equipment, specificity, etc.;
- Unsymmetrical development of the natural sites;
- Low funding, resulting in limited availability and reduced international visibility;
- Deficits of analysis, strategies and social consensus, favouring the development of the adventure tourism in the region;

The suburban part of the area contains a number of tourist resources with a modest realization but a great potential for developing quality and attractive products.

Very suitable conditions for *skiing and mountain tourism* exist in the municipality of Berkovitsa (**ski complex under Kom peak**) and the surroundings of Berkovitsa (**Ashiklar area**). Kom peak (2016 m) is a starting point for many hiking routes, including an international E-3 (from the Atlantic Ocean to the Mediterranean), *hang gliding and recreation*.

Several *eco paths* have been built that attract ecotourism lovers and childhood natural beauty. In the municipality of Damyanovo there is an eco-trail near the Kopren peak and the village of Kopilovtsi, in the municipality of Chiprovtsi - ecotrail of Deyanitsa, in Berkovitsa municipality - eco-path to the Haydushki waterfalls.

Some of the most significant natural resources for the development of adventure tourism in the area are:

- The Vratsa Balkan Nature Park

The Vratsa Balkan Nature Reserve was declared a national park in 1989, and then designated a nature reserve by Decree № 987 on November 13, 2003. The park covers parts of three administrative districts - Vratsa, Sofia and Montana, five municipalities - Vratsa, Mezdra, Svoge, Varshets and Krivodol and twenty-one land plots.



The reserve extends over 28,344 hectares, and offers a rich variety of animal and plant species. Some 57 species of plant life protected in the park are listed in Bulgaria's Red Book (a list of all endangered and extinct forms of life within the country's borders). Of these, 8 are considered particularly endangered, such as scaly heather (*Asplenium lepidum* C. Presl) and long-leaved hare's ear (*Bupleurum longifolium*)

The park contains belts of oak and beech that harbor 180 bird species, 157 of which are protected under the Biodiversity Act. Black storks (*Ciconia nigra*) nest in the park, as do the rock eagle (*Aquila chrysaetos*), the green woodpecker (*Picus viridis*), and others. Mammals in the park include deer, wild cats, badgers, otters, black polecats, and other species.

During the months of May and June, there are more than 170 waterfalls in the park, and 17 are active during the entire year. The Skaklya Falls, some 10 km north of the city Svoge, are the highest seasonal falls in Bulgaria at 141 meters. This waterfall has been declared a natural landmark by Decree № 3794 on October 11, 1965 and is listed in the Bulgarian Register of Protected Areas and Regions. Another interesting waterfall is Pine Rock Falls, which derives its name from a black pine nearby. This waterfall has a height of 63 meters and is located near the village of Zgorigrad.

Also within the park are the Vratsa Cliffs, sheer karst cliffs some 400 meters high – the highest cliffs on the Balkan Peninsula. Here are remains of the Medieval Vratitsa (or Vratsa) Fortress, dating from the 10th-12th centuries. There are guardrails to aid hikers scaling the cliffs. The road that passes through the Vratsa Pass leads to the Ledenika Cave. On the sheer rock faces of the cliffs there are some 140 routes for rock climbers, of varying difficulty.

With its diverse topography, proximity to the city of Vratsa and Montana, and numerous populated areas, the Vratsa Balkan Nature Reserve is a favourite destination for ecological and alpine tourism. Near the village of Lyutibrod are the Cart Rails, four rock walls aligned one after the other. Local residents named the formations, since they bear a strange resemblance to giant ox cart; because of their jagged shape they also look like the walls of a ruined fortress.

Near the Cart Rails is the Rashov Ravine, a place of historical importance associated with the 1876 April Uprising against the Ottoman rulers.

In the upper part of the field a sheep pen from the period has been preserved, since it was here that the battle was joined. There is a chapel in the field, and lower there is a memorial plaque honoring those who died during the uprising.

The Lakatnishki Cliffs are another protected area in the park, and also offer many routes for climbers. These cliffs are on the left side of the Iskar River, not far from the Dark Hole Cave and Razhishka Cave.



On the heights of Okolchitsa (1048), which have also been set aside as a nature reserve, there is a stone cross honoring the revolutionary Hristo Botev (1848-1876), and his role in the 1786 April Uprising. Every year on June 2, the day Botev was killed, a memorial service is held in his honor at the foot of the monument. Botev was executed 2 km from Okolchitsa Peak, at Yolkovitsa.

There are 16 tourist routes in the Vratsa Balkans Nature Park, traversing a variety of landscapes and natural landmarks. Of these 8 are developed, with informative signs explaining the nature of each route: “The World of Ecology”; “Mountains for Beginners”; “A Fairytale Forest Trail”; Insurrection Gorge – Skaklya Falls – Vratsa; “Karst and Biological Diversity”; “The Forest – Where Life Is Welcome”; “In the Footsteps of Botev’s Revolutionaries”; and “Ancient and Medieval Vratsa”. The park also offers three routes for cyclists, of varying difficulty.

- Bergland Horse Riding Station

The Bergland Horse Riding Station is situated in the beautiful Western Balkans at the entrance of the town of Berkovitsa. The base is in close proximity to Kom peak, peak Todorini Kukli, Klisura Monastery, Burzia River.

In addition to the olympics and children's maneuvers, in which are being conducted riding trainings, the base also possesses hundreds of hectares of meadows, which are a wonderful and safe place to ride in the wild. At the disposal of the base is a variety riding routes of different complexity and duration.

The routes pass by churches, monasteries, chalets, waterfalls, lakes, rivers, etc. The base has 17 horses of different ages, characters and colours. Among the horses there are mild creatures that help beginner riders discover the beauty of riding without fear and anxiety, but there are also powerful stallions that are very challenging to the most experienced riders in the world.

- Sopovo area

Sopovo is located near the village of Stoyanovo, Montana district. The Botunia River passes through the area and there is an iron bridge called the Miracle of Northwestern Bulgaria that was built over it in the 19th century. The area is not very well known, perhaps because it is difficult to access. It can be seen interesting deep holes, which allegedly have been used as winter sleeping lawns. The area is hardly accessible but extremely beautiful and holds opportunities for variety of adventurous activities.



- Stovtzi Peak

Stovtzi peak is located west of the village of Smolyanovtzi, Montana District, in the western part of the Balkan Mountains. Its height is 866 meters. At the time of the Romans at the top there was an observatory because of the strategic location of the area, called Hundred Sheep. Later, a monastery was built and destroyed afterwards.

Stovtzi is a very interesting place, from where to the north you can see the calm waters of the Danube, to the south - the Stara Planina mountain with Midzhur peak, to the west - the vicious hammer of Vrashka Chuka and the Belogradchik Rocks. The environs of the cliff are of exceptionally beautiful landscapes, including magnificent discoveries of the red perm breccia-conglomerate under the peaks of Babu, Milov stone, Peshin Vrah, Tsarska Polyana, as well as the picturesque valleys of the rivers Karachitsa and Gyurgichka bar, sunk in the forests of the Balkan Mountains.

The rock phenomenon is best seen from the north by the E-79 international road. Approaches to the peak are from the nearest villages - Smolyanovtzi, Belotintsi, Giurgich and Prevala.

- The "Haidushki Waterfalls"

The "Haidushki" waterfalls are located in the exceptionally beautiful valley of the Big River, 9 km from the city of Berkovitsa, where the waters of the rivers "Tsenkova", "Slivashka" and "Sredna bara" merge. Flowing boisterously, here they take become placid, running slowly, just to rush suddenly and uproariously back at the rocks and jumping between the cracks, broken into white foam, to reunite and force their way to the city.

- Peak Kom

The peak is 2,016 metres high and lies south of the town of Berkovitsa, of which it is a traditional symbol. Kom, along with the lower peaks Sreden Kom ("Middle Kom") and Malak Kom ("Little Kom") to the east, form a west-east elevation with a round grassy ridge, a steep rocky northern slope and a slant grassy southern slope. Looking north, one can see Berkovitsa and the surrounding fields, as well as Montana and the Ogosta Reservoir some 30 kilometres away. Kom also marks the start of the Bulgarian section of the European walking route E3, also known as the Kom–Emine path along the main ridge of the Balkan Mountains, as well as the eponymous off-road race.

There are several climbing routes to the summit, such as from the Kom chalet (two-hour climb), from the Petrohan Pass (taking 3 hours 30 minutes to reach the peak), from the villages of Komshtitsa and Gintsi (3 hours away).

The Nishava River, a major tributary of the South Morava, originates east of Kom Peak, as does the Visochitsa. Along with Midzhur, Kom is among the highest and best known peaks of the western



Balkan Mountains. A Bulgarian brand of mineral water is branded after Kom. The peak is part of the 100 Tourist Sites of Bulgaria, together with the museum of ethnography in Berkovitsa. There are several ski pistes descending from the peak.

Speleology Tourism in Montana district – overview (resources, interest to the sites, management)



Speleology is the scientific study of caves and other karst features, their make-up, structure, physical properties, history, life forms, and the processes by which they form (speleogenesis) and change over time (speleomorphology). The term speleology is also sometimes applied to the recreational activity of exploring caves, but this is more properly known as caving or potholing, or (not usually by participants) by the largely obsolete American term spelunking. Speleology and caving are often connected, as the physical skills required for in situ study are the same.

Caving as a tourist offer is focused on the tourists with a great love for the study and teaching of underground karst phenomena such as caves and pits, as well as unusual and rare plant and animal species. Cavers caving made plans based on the measurement of dimensions and providing cave channels, as well as documentation of morphological, hydrological, geological and physical properties. Given the activity of cavers to deep and complex holes and special caving techniques and training caving team, we can say that part of caving activities like mountain climbing and can be considered a sport activity. For the purposes of tourism, caves and pits are often tailored to the tourists so that tourists, if they decide to speleological research or I visit some of the caves or cave, often go accompanied by guides who are trained to navigate the caves that tourists do not get lost or jeopardized. Known caves often have other tourist offer such as souvenir shop, a place for a meal or refreshment.

- Varshets



Varshets is a town in Montana Province, north-western Bulgaria. More than 79 caves and chasms, some of which are the deepest (depth above 100 m) and the most beautiful in Bulgaria, have been explored in the Strasher share. The most famous are: Sokolska Cave, Cave Cross, Barkite, Kalia Mutnitsa Cave Complex, The Paleontological Site and the Spiridon Kladenets Area.

- *Dolno Belotintsi*

Dolno Belotintsi is a village in northwestern Bulgaria. It is located in Montana municipality, Montana region.

The village is located in the valley of Mount Pusterina, 6 km from Montana. The relief is mostly flat and semi-mountainous. The climate is in the moderate-continental climatic area and in particular in the climatic region of the high fields of the Pre-Balkan sub-region.

 Caves & Creeks:

- The direct hole in the village of Dolno Belotintsi, Montana 41 m.
- Zmiornika village Dolno Belotintsi, Montana 13 m.
- The village of Dolno Belotintsi, Montana 20 m.
- Blind hole with Dolno Belotintsi, Montana municipality 17 m.
- Bear hole with Dolno Belotintsi, Montana municipality 22 m.
- Mechi Dupki Village of Dolno Belotintsi, Municipality of Montana 55 m.
- Mechi Dupki village Dolno Belotintsi, Montana 14 m.
- The cave over the Imanie village Dolno Belotintsi, Montana 12 m.
- Yamata village of Dolno Belotintsi, Montana 8 m.

- *Berkovitsa*

Berkovitsa Municipality is situated in the southern part of Montana District, the mountainous and semi-mountainous part of the Western Stara Planina. It possess rich variety of natural resources and high potential for development in the field of speleology tourism as there are several caves with structure and forms, able to stimulate the interest of visitors if explored right from the relevant stakeholders.

- "Marble Cave"



Marble Cave is located near the town of Berkovitsa. Declared as a natural landmark with Order №995 / 1971r. of the LAG with a total area of 16.3 ha. The cave is famous for its marble formations, underground galleries and cave faunistic species, but has not been fully studied. It is conserved with the aim to be prevented damages and spoilages.

- "Mishin kamak"

It is located in the village of Gorna Luka, in the Chiprovtsi part of Stara Planina. Declared a natural landmark with Order No. 2634/1962. with a total area of 0.5 ha. The cave is famous for its many white crystalline formations and underground ponds, but has not been studied. It is conserved with the aim to be prevented damages and spoilages.

- *Belotintsi*

Belotintsi is a village in northwest Bulgaria, Montana municipality, Montana region. The village is located at the northern foot of the Shiroka Mountain, which is part of the mountain chain of the Fore Balkan. Forebalkan is a low mountainous and hilly zone, located to the north of the Main Stara Planina chain. The highest peak of Shiroka mountain is Mount Tipchane - 941 meters above sea level.

Along the village passes the Karachitsa River, springing from the Shiroka Mountain. Also, here is the Zanolvski Zuber area with the cave of the same name (**Zanolvska Cave**) about 80 meters in length; it is located on the left bank of the river. Close to the village there is another cave - **Meyova dupka** (Меџова дупка), 15 meters long.

Notwithstanding, conclusions regarding the mentioned caves (despite meeting all the criteria for successful speleology destinations in terms of diversity of forms) can hardly be made as there is a serious deficit of information about their current condition, infrastructure, terms of entry, etc. making them practically invisible for the potential tourists.

Until 1975, it the village was part of Vidin County, then moved to Montana. Once the village was in a relatively good socio-economic condition with more than 2500 inhabitants, forming the general vigorousness of the region. However, in the recent years due to demographic crisis, lack of investments, deficit of opportunities for work and development, the village suffered from steady deterioration of all most important economic indicators and is facing a continuous process of depopulation. The local authorities dedicate efforts to change that: in 2009 they completely renewed the center - new plates were placed in the square in front of the imposing monument of the local heroes who died in the wars. The 150-year-old St. Nicholas Church, a monument of culture, was built and painted in 1866 by the painter Nikolai Konstantinov. These efforts are insufficient for the alteration of the general condition and tangible improvement of the living standard of the citizens



and therefore a more coordinated and measure-profound approach is in need for elaboration; the inclusion of the village as a part of a tourist route can result in various benefits for the citizens of Belotintsi and can turn into a solid foundation for a sustainable growth.



“In the Montana region the distribution of the settlements is influenced by the natural geographic features of the area - the varied relief including the Danube Plain, the Fore Balkan and the Western Stara Planina. Overall, the distances between settlements are not large. Depending on the relief, the settlements are flat and mountainous. The trend of depopulation of smaller and more remote settlements is mainly related to socio-economic reasons. Municipal centers focus more of the population in the area. They contain the majority of enterprises that provide employment for the population. Evident is the concentration of the population in the larger, with built-up infrastructure settlements. Small villages have potential opportunities for rural and forestry development and alternative forms of tourism.”

Regional Strategy for Development of the Montana District 2014-2020

Analysis of the resources for the development of cave (speleology) tourism in the city of Montana:

- Existence of caves with significant potential to become recognizable speleology destinations;
- Low funding, resulting in limited availability;
- Reduced international visibility of the resources in the region;
- Serious insufficiency of information regarding the sites, impeding their positioning in the international speleology map;
- Deficits of analysis, strategies and social consensus, favouring the development of the speleological resources and cave tourism in the region;



S.W.O.T analysis regarding the development of the tourism sector in the City of Montana with a focus on cultural, adventure and speleology tourism

Strengths	Weaknesses	Opportunities	Threats
Favourable geographical location, defining the richness of natural resources	Montana as part of the North-Western region, which is characterized with negative socio-economic trends: depopulation, unemployment, lack of investments and opportunities for development;	Active inclusion of the North-Western region in the national development policy, focus on the need for substantial improvement of the socio-economic reality of the municipalities and definition of concrete strategic measures to be implemented. If approach of such type is elaborated and followed, it is estimated to lead to the elimination of the barriers, currently obstructing the more dynamic tourism development of the region.	Continuity of the negative processes of depopulation, unemployment and investment deficits thus resulting in even higher discrepancy between the regions in Bulgaria; superficiality of measures, that do not possess the internal strength to change the established pattern; focus on one sector – for example tourism without taking into consideration the interdependence between all segments of the economy of a country;
Resilient culture with variety of traditions and customs, able to attract visitors and to ensure consistency in their experience	Low recognisability and limited presence on the international market	Active exploration of the untapped potentials by comprehensive analysis of the international market and the tourists expectations, resulting in a thorough strategy for the popularization of the City of Montana (incl.	High level of commercialization, degradation of local identity and marginalization of the “essence” at the expense of the short –term intensification of tourists presence, resulting in



		implementation of a new marketing approach)	immediate profits; loss of perspective and long-lasting vision
Unexploited natural resources, environmental purity	Lack of appropriate infrastructure, the future development of which will involve much financial resources, but is imperative if following the aim of transforming Montana into a recognizable tourism destination;	Sustainable utilization of natural resources, unspoilt environment managed rationally that is able to provoke a lasting interest in the visitors and to generate incomes in the local economy;	Uncontrolled utilization of the natural resources, over construction, irrationality of the management and lack of long-term vision;
Competitive prices in comparison with other European cities;	Prices similar to the one in the cities of Central and Eastern Europe, which circumstance deprives Montana of important advantage;	Improving the quality of the tourist offer, active development of the natural and cultural heritage as factors with great significance among tourists (in accordance with Eurostat survey), so that the price factor is not the leading one;	Artificial lowering of the prices, which can result negatively to the employees in the tourism sector and all other industries of relevance; improving the quality and the scope of the services, but not increasing the wages of the employees; implementation of short-term strategies and loss of a long-lasting vision for development;
Variety of cultural sites, easily accessible and located in close distance;	Not enough facilities available at the disposal of children, people with limited physical abilities and elderly; low compliance with safety standards in some areas	Improving the quality of the sites with facilities at the disposal of children, people with limited physical activities, elderly; enhancing the compliance with the safety standards and educating citizens and	Opening space for malpractices and corruption when dealing with the issue of insufficient accessibility; the urgency of the problem can be interpreted as an opportunity for quick



		tourists on the topic of safety	and questionable measures in term of quality;
Diversity of the tourism product	low utilization of the available resources, ineffective marketing strategy, limitation of the reached people; insufficient rate of digitalization of the tourist offer	Elaboration of a competitive marketing strategy and promotional activities in compliance with the international standards; enhanced digitalization of the tourist offer, implementation of new online services of assistance to the tourists	Focus on a limited number of tourism activities on the expense of others resulting in short-term improvement of the general condition, followed by a rapid deterioration; for the establishment of Montana as a competitive tourism destination all available resources need to be utilized in a sustainable and strategical way;
Rich cultural calendar, including musical and dance festivals, literature, crafts & arts and other events.	Language barrier, low popularity outside the borders of the city of the city	Involvement of international artists in the different events, extensive promotional campaign, elaboration of logistics able to secure the quality stay of the tourists during the festivals; intensified dynamics of the communal life	High incorporation of elements of other cultures and traditions, resulting in alteration of the specific characteristics of the events; loss of recognisability among the citizens of Montana, disruption of the dynamics of the communal life



Analysis of the current condition and the perspectives for development of Sofia as a tourist destination in the field of cultural, adventure and speleology tourism

The current analysis aims to present the actual condition and perspectives towards the development of cultural, adventure and speleology tourism, therefore is limited in content; however, the conclusions made can be of assistance for the general evaluation of the condition of the tourist product in Montana as the three areas subject to the analysis are part of a systematic whole, which presupposes certain repeatability of the pattern and provides space for an inductive reasoning, able to grasp the whole through establishment of a better perspective towards its integral elements.

Introduction:

Sofia - the capital of Bulgaria possesses a relevant combination of natural and cultural tourism resources, which is a prerequisite for the development of various forms of tourism suitable for different ages, social and professional target groups; it is among the 20 municipalities identified as tourism destinations in the country with high potential for realization as a result of conducted strategic studies and analysis.

An important factor for the general development of the tourism sector, which is taken into account in the analytical studies, is the place and the role of Sofia as a main starting and ending point for the foreign tourists using air travel with different tourism objectives in mind, but exclusively to winter resorts falling into Sofia`s active influence (Vitosha, Borovets, Bansko).

The economic functions of the capital city are an important factor for business development tourism; they are thought to be vital to the development of urban tourism. According to Hall (2002:235) "capital cities are an important component of the national fabric of almost every country in the world yet, surprisingly, very little has been written about their tourism significance beyond a city by city basis." However, by simple definition, national capitals cities are the seat of the national government and although this role can vary widely, in general "*capitals are unique from other cities because they provide a special site for the concentration, administration and representation of political power*" (Campbell 2003:3). Therefore despite their heterogeneity, **national capitals do share a common function**, and often this common function is cited as the root of a number of tourism marketing, planning and development issues.



National capitals provide key tourism resources and are often a unique selling point for place marketing, furthermore - tourism in capital cities may contribute to national identity and citizenship.

In addition to business related travel, capital cities are also significant for tourism because of their cultural, heritage and symbolic roles. They frequently host major national cultural institutions while they also have a significant wider role in the portrayal, preservation and promotion of national heritage and the showcase national culture (Therborn 1996). Such a concentration of arts and cultural institutions will therefore have implications for the travel and activity behaviour of culturally interested tourists as well as contributing to the image of a city as a whole.

At one level, the importance of national capitals to tourism is straightforward. First, national capitals are often popular and well-established tourism destinations, attracting a high proportion of international and domestic visitors. Second, there are more of them, and their numbers continue to grow. Three-quarter of today's national capital cities were not capitals 100 years ago (Capital Alliance, 2003), and the expansion in numbers – while uneven – has broadly coincided with the evolution of globalisation and the development of mass tourism since the 1960s. It now seems that this growth will continue. Pressures for devolution and the search for recognition by sub-national groups mean more cities seek to move from being a provincial city to being a national capital, as larger entities fragment into a series of smaller nations. This process is uncertain and protracted, sometimes peaceful (for example, the 'velvet divorce' of the Czech Republic and Slovakia), sometimes violent (for example, the break-up of the former Yugoslavia). Third, capitals are often the main national gateway, in a literal sense, since they are frequently the international entry point for air travellers and the hub of national transport systems. Fourth, capitals have a key role in representing a nation to the rest of the world and to itself: as the focus of national imagery and representation they 'play... a vital role in establishing national identity' (Capitals Alliance, 2003, p. 9). Capitals boast accumulations of museums, galleries and other national institutions along with heritage and a built environment that constitutes a critical mass of cultural attractions for tourism. Heritage, culture and architecture have long been used by capitals to compete internationally and to mark their status in the world (to a domestic as well as a foreign audience). The contemporary appeal of many capitals rests on the legacy of past competition. Gilbert and Driver (2000, p. 23) point out that 'the form, use and representation of modern European cities have been shaped by the global history of imperialism in ways that continue to matter even in an apparently post-Imperial age', while Frost (2012) shows that the appeal of many destinations can be linked to their former status as national capitals. Finally, as centres of governmental and commercial power, capitals attract business tourists, meetings and conference delegates, and are centres of educational tourism as citizens learn more about their country. There can be dissonance between these different roles: for example, for cultural and leisure tourists, centres of government may be seen as dull at best, unattractive at worst.

Source: Tourism in National Capitals and Global Change; R.Maitland - 2012

It is considered that countries and regions that have good socio-economic characteristics are substantially more attractive to tourist contingents and Sofia Municipality possess one of the highest indicators of economic development in comparison with other cities in Bulgaria:



- The highest gross domestic product, gross value-added and gross domestic product per person (presented in table 1)

Sofia (capital) is the area with the highest incomes and the highest quality of life. In 2015 the GDP in the capital again began to grow steadily after several years of hesitant growth and reaches BGN 26 690 per capita, or more than double the average for the country - 12 339 BGN / person. Incomes and wages in Sofia (the capital) also continue to grow. Gross wages in the capital increases rapidly and reaches BGN 14 531 per year at BGN 10 535 in the country in 2015

In 2015, the capital is the area with the smallest population, living with material deprivation (19% at 32% for the country) and that living below the national line of poverty (8% at 23% for the country).

- The highest level of foreign direct investments in enterprises in the non-financial sector (table 2)

The capital is the area with the highest investment activity. The relative number of working enterprises reaches 85 per 1000 people in the population at 55 per 1000 people in the country in 2015. At the same time, investments in FTA but they remain twice as high as the average for the country with a value of over 6000 BGN / person on floor 3000 Leva per person for the country. The difference in the relative size of attracted PIIs is almost triple up to now - 9164 euro / person of the capital at the end of the year 2015 at 3250 euro / person for the country.

- High employment rates

The capital is characterized by the most favorable indicators for the labor market. Over the last few years economic activity in the capital continues to grow rapidly to 75.4% in 2016 compared to an average of 68.7% the country. Employment in Sofia (capital) is also growing and reaching 72.5% at 63.4% for the country, and unemployment fell to 3.9% at 7.7% for the country.

Low unemployment in the area can be related to the educative structure of the population. Population share of age between 25 and 64 with primary and lower education in the capital is six times lower than in the country - 3% at 18% in the country in 2016. The share of university graduates in Sofia it reaches 51% at 28% for the country.

Furthermore, the intensity of cultural life in the capital is assessed highest in relation to other areas. In 2016, the relative number of visits to cinemas is nearly three times higher of the country average (2161 per 1000 people at 778 of 1000 people for the country) and of the libraries - over double higher (1241 per 1000 people at 605 per 1000 for the country), both indicators remaining high in the latter several years.



Local theatres and museums continue to attract visitors and their interest increases in 2016, reaching 603 visits to 1,000 people in the theatres (at 322 per 1,000 people for the country) and 821 per 1000 people in the museums (at 734 per 1000 people for the country).

Figure 2. Distribution of foreign direct investments in enterprises in the non-financial sector on the territory of Bulgaria

Source: NSI

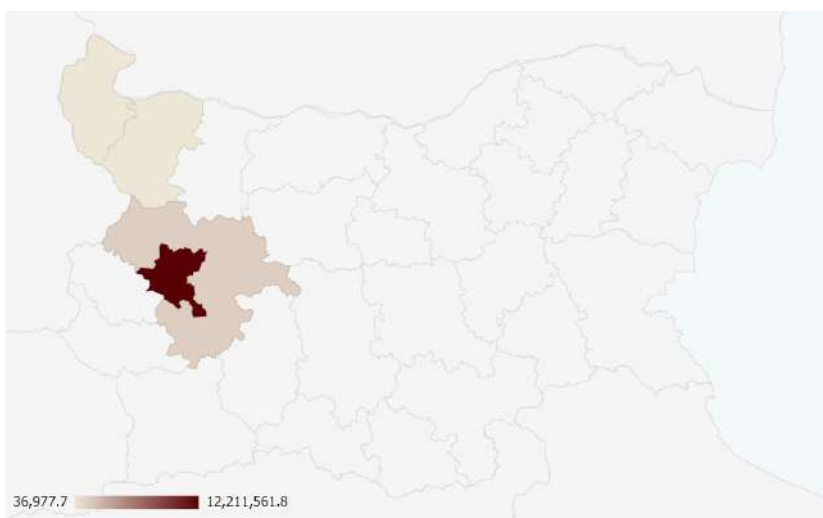


Table 3. Rate of employment and unemployment on regional level for year 2016 in percentages

Source: NSI

*in green: employment

*in red: unemployment

Sofia district – 56 % of employment; 7 percentages of unemployment

Sofia (capital) – 73 % of employment; 3 percentages of unemployment



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Figure 4. Amount of grants for beneficiaries of EU operational programmes per person in lv.; 30.06.2017

Source: eufunds.bg

- ❖ Sofia with highest grant of 2509 lv. (1279.55 euro)
- ❖ Kyustendil with lowest grant of 614 lv. (313.13 euro)

Фиг. 5. Стойност на изплатени суми на бенефициенти по оперативни програми към 30 юни 2017 г. (лв./човек)



София (столица)	2509	Благоевград	1017
Габрово	2395	Русе	1012
София	1588	Кърджали	975
Бургас	1434	Смолян	971
Враца	1397	Варна	935
Ловеч	1395	Силистра	929
Ямбол	1217	Плевен	914
Монтана	1181	Хасково	896
Разград	1159	Добрич	865
Велико Търново	1157	Перник	826
Видин	1129	Търговище	816
Шумен	1111	Пазарджик	782
Стара Загора	1064	Сливен	623
Пловдив	1044	Кюстендил	614

Източник: eufunds.bg, изчисления на ИПИ.

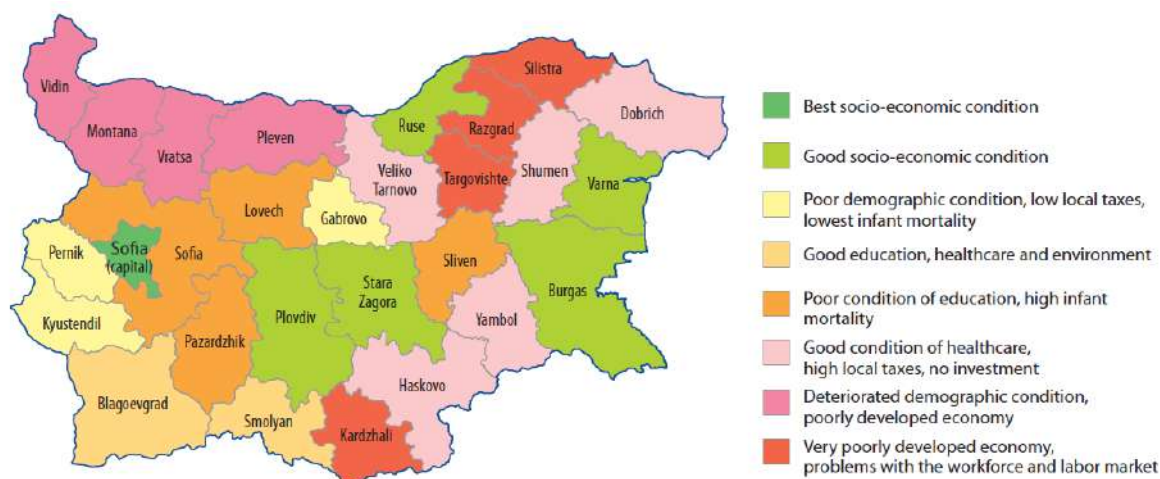
An important circumstance - mainly a product of the high general state of the social-economic reality of the city, is the high absorption rates related to European financing from various thematic programmes.

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The Project is co-financed by EU through the Interreg – IPA CBC Bulgaria-Serbia Programme. The content of this document can in no way be taken to reflect the views of the European Union or the Managing Authority of the Programme.



The capital distinguishes from other cities substantially in this regard, mainly due to several major projects, such as the Metro and Sofia Tech Park. As of 30 June 2017, paid amounts under Operational Programs reached 2509 BGN / per person at 1344 BGN / per person for the country.



Source: Eufunds



Key facts and important aspects

Sofia (capital) is the area with the highest incomes and the highest standard of living, highest investment activity and the most favourable indicators for the labour market. The capital borders with several motorways and the importance at the central train station is the reason for the high density of the railway network. It is also the area with the highest access to internet and the largest share of the population using it.

The capital still has the highest weight of the major local taxes and charges, although the tax burden does not have risen in recent years contrary to the general trend.

The coverage of the cadastre continues to increase to be the highest in the country. Transparency of local administration is also estimated to be relatively high in 2017.

Sofia (capital) is one of the few areas in which the age of the population structure is improving if considered the relation between the population aged 65 and over to that of 0-14 years. The capital is still the area with the highest coefficients of natural and mechanical growth.

Students from the capital receive the highest marks of matriculation exams, but the scope of the education system is lower than the country average. Access to health restaurants and specialists in the capital explains traditionally the high number of treated patients. With regard to security and the capital is the weakest among the Bulgarian regions. The intensity of cultural life is rated highest in relation to other areas.

- *Regarding the absorption of EU funds:*

By mid-May 2016, Bulgarian municipalities have absorbed nearly BGN 5 billion as beneficiaries of the EU's operational programs. The average municipal absorption rate reached BGN 689 per capita of the average annual population, from BGN 565 per person at the beginning of 2015 and BGN 380 per capita at the beginning of 2014.

- ❖ *The rate of absorption of European funds by municipalities as beneficiaries of EU operational programs is extremely uneven. In proportion to the population it varies from BGN 4,773 / person in Sozopol to BGN 0 / person in Gramada.*



- ❖ *There is no correlation between the size of the municipalities and the amount of EU funds per capita employed by the local population. There are many examples of small municipalities that reach a high degree of absorption (such as Kostinbrod, Pirdop, Sozopol, Lukovit, etc.), as well as large ones (such as Plovdiv, Pazardjik and Kyustendil), where the rate of absorption is lower of the country average.*
- ❖ *The difference in the ability of municipalities to absorb European funds is deepening - while some of them continue to win and execute projects, others have yet to build up a long process of accumulation of experience and administrative capacity.*
- ❖ *Concern is the fact that the number of municipalities that have absorbed less than BGN 100 per person remains unchanged - 30. Most of them are small municipalities, the largest being Kirkovo (Kardzhali district) and Dulovo (Silistra district) with a population respectively 21.4 and 28.0 thousand people in 2015.*
- ❖ *The opening scissors between the municipalities that achieve a high absorption rate and those at the bottom of paid sums shows another - the demographic realities in our country place some local communities in serious testing with regard to their purely administrative capacity to manage European funds. Although the territorial-administrative reform is currently not on the agenda, it can not be avoided in the near future, especially if the current powers and responsibilities of municipalities remain in the future.*

Criteria for quality of the tourist product of city of Sofia (incl. current tourist visits and interest to the sites, management, etc.) - current compliance, deficits and actions to be taken:

The city of Sofia is a social, educational, economic and cultural centre of the Bulgaria; it unarguably possess high potential for sustainable development, which if explored right - , can result in benefits of various character for the individual, the community and the country as a whole (**currently existing to a high extent in comparison with other territorial centers within the territory of Bulgaria**)

The tourism product of every destination can be defined as a cumulative effect of several important factors, which reflect the most substantial needs of the visitors and are responsible for the positioning of the destination in the international tourism niche:

- *Criterion: Accessibility*



The term accessibility can be interpreted in a dualistic way: i) accessibility as constructed proper infrastructure (such as railway and air connections), allowing the potential visitors to organize their time and resources in a predictable and reasonable manner and ii) referring to the concept of “accessible tourism” representing the ongoing endeavour to ensure tourist destinations, products and services are accessible to all people, regardless of their physical limitations, disabilities or age. It encompasses publicly and privately owned tourist locations.

Darcy and Dickson (2009, p34) :

Accessible tourism enables people with access requirements, including mobility, vision, hearing and cognitive dimensions of access, to function independently and with equity and dignity through the delivery of universally designed tourism products, services and environments. This definition is inclusive of all people including those travelling with children in prams, people with disabilities and seniors.

Compliance with the stated criterion:

Regarding point i) – accessibility as constructed proper infrastructure, the city of Sofia can be placed **in a high level of compliance** with the requirement as it possess functioning infrastructure, although efforts need to be directed towards its optimization.

- Air transport:

Information on air transport in Sofia is insufficient for detailed and an in-depth analysis of the subject. The information in the General Plan of Sofia municipality is obsolete. The main source of up-to-date information is the Integrated transport strategy of the Republic of Bulgaria, but it is mainly at the national level.

Air transport is represented by the largest international airport for passengers and freight - Sofia Airport, located about 10 km. east of the center of the capital. The airport is expanded and refurbished in line with international standards to improve the quality and security of service and provide the opportunity to handle greater passenger and freight traffic. The significance of the airport is determined by the passenger flow, which is concentrated in Sofia and then distributed throughout the country. According to data from Sofia Airport, 3 474 993 passengers were serviced in 2011. In view of the development of tourism in the area, the airport can be effectively used as a place for active and targeted advertising for tourist products and destinations.

Over 20 airlines operate service to/from Sofia, with direct flights to/from many European and Middle East cities.

The travel between the airport and the city is of convenient character as it can be conducted by several transportation means: metro, bus and taxis.



In 2016, Bulgaria is the second fastest growing country in Europe by the number of passengers in transit through the major airports of the country - by 15.2% after Iceland by 29.9%. The number of passengers crossing Sofia Airport is even higher than the national one - 21.8% in 2016 compared to 2015. The number of passengers has increased from 4 088 943 to 4 980 387 per year. The strong increase in the volume of low-cost airlines is the main factor influencing the almost double growth in the number of foreign tourists in Sofia, according to data from the Bulgarian Ministry of Finance, more than 56% of the foreigners who visited Bulgaria in 2016 arrived precisely with a low-cost airline.

Air transport in Sofia plays a major role in the international connectivity of city and country - both in terms of passenger and freight transport; the penetration of low-cost airlines has led to significant passenger growth flights to and from Sofia Airport and growth in international tourism in the capital. An analysis and debate is needed on the future of existing airports in the Sofia - Dobroslavtsi, Bozhurishte, Musachevo.

- Railways:

The information on the railway transport in Sofia is extremely scarce. Available sources are mainly from the National Railway Company infrastructure ", which provides data on passenger and freight traffic via railway junction Sofia. Detailed study of the long - term development of the railway transport in Sofia was made in 2000 to the process of preparing Sofia Municipality Master Plan, which to date is quite obsolete.



The region is the most important railway junction for the country - in the city of Sofia, where it connects with the interior of the country in 5 directions. There are 8 stations (Central, Smirnenski, Sofia-North, Iliyantsi, Poduene, Iskar, Sugar factory, Gorna Banya and Nadezhda stop) with the respective locomotive and wagon depots. Sofia Central Bus Station allows passengers to be served both domestically and abroad.

The railway transport of the capital is in 4 directions - to the Turkish border through Plovdiv via First Main Railway Line, to Varna, through the sub-Balkan ditches to the Black Sea ports and to Greece, Macedonia and Serbia. The line Novi Iskar - Mezdra is part of the 7th main line for Northern Bulgaria and Romania with constant intensive traffic. Railway Infrastructure Knots in the city of Sofia include stations, interchanges, landfills, bases, industrial branches and unloaders.

International trains provide a large number of routes to Sofia, arriving from such places as Kiev, Istanbul, Vienna, Belgrade, Bucharest, Moscow and other common cities.



←Source: Railway Development Project Sofia, 2015 - NRIC

On 26 April 2016 the central railway station was reopened after nearly 2 years of renovation. The new station has new waiting rooms, solar panels, more security and is more accessible to disabled people.

However, there are many significant operational weaknesses regarding the railway infrastructure including the disrupted dynamics of a relevant interrelations between employees – passengers; there is the language barrier which indicates that the staff does not meet the needs of the visitors for practical communication. Furthermore, a culture of responsiveness is considered to be deficient *in general* in the structure of the Bulgarian service sector which contributes to the general dissatisfaction of the tourists with the transportation system.

Other problems of various character that define the railway network are disruptions of the informational flow including a lot of delays, technical incapacibilities regarding the infrastructure, lack of modernization activities, etc.

The potential of the railway network in Sofia for the implementation of interurban and urban transport suburban trips are not fully used; It is necessary to update the data on the state of the railway infrastructure in Sofia. There is a need for a detailed study of the possibilities of rail transport in Sofia to take in urban and suburban trips with an analysis of its obstacles proposals for a change in the organization of train movements.

- Other options – car, bus, metro

Major national roads and three of the ten international transport corridors pass through the territory of the EUSR, with three trans-European transport corridors intersecting in Sofia: - Corridor 10 (Central Europe-Belgrade-Sofia-Istanbul); - Corridor 4 (Northern and Central Europe - Vidin - Sofia - Athens); - Corridor No 8 (Italy-Albania-Macedonia-Sofia-Bourgas- (Varna) -Kauksee republics). The main roads are: southeast direction - Trakia motorway, east-northeast - Hemus highway and Zadobalkan valley, southwest direction Pernik-Blagoevgrad - Kulata, northwest - direction Slivnitsa-Kalotina.

Access to Bulgaria's Capital is via several entry points:

From the North & South via E79/A6 2. From the East - via Thrace Highway E80/A1-A3 or from the old road paralleling the E80 Highway - Zlatitza - Pirdop - Pazardzhik route. 3. From the West - via A1/E80 Liking the city and the Bulgarian-Serbian Border point of Kalotina.

- A1 connects Sofia to Burgas on the Black Sea.



- A2 is planned to be from Sofia to Varna and as of July, 2013 it ends at Yablanitsa and continues from Shumen to Varna.
- A3 is planned to be from Varna to Burgas, but currently has only a few kilometers built.
- A4 connects Sofia with Turkey. With the completion of Highway "Maritsa" this road is completed.

Figure 1. Sofia's position in terms of road connectivity



Sofia Central Bus Station (Centralna Avtogara/Централна авторапа) is in the north part of the city centre and is within walking distance to the central attractions. Schedules and fares are available in Bulgarian online.

Eurolines Bulgaria is the largest operator of international buses to/from Bulgaria. Buses operate to/from Belgrade (5 hours, €23) and other cities in Serbia, Vienna (15.5 hours, €59) and other cities in Austria, Paris (36 hours, €120) and other cities in France, Berlin (28 hours, €110) and other cities in Germany, Budapest (11-13 hours, €48), and Prague (21 hours, €63); in addition, there are 3 smaller bus stations that serve only local destinations.

Structure of the internal transport of Sofia:

The LNG route network in Sofia has a sufficient density that is comparable to the developed European cities close to the territory population.

Nevertheless,



- ❖ Not yet significant areas being covered by the Metro network in Sofia; too long intervals in peak hours (overloading of MC Serdica);
- ❖ Low average speed of trams, trolley buses and buses;
- ❖ Insufficient share of tramways;
- ❖ Insufficient flexible billing system and lack of hourly charging do not allow for more flexibility in choosing alternative routes;
- ❖ It is necessary to restructure and optimize the bus lines in order to meet more qualitatively the needs of the citizens;

Regarding point ii) the concept of “accessible tourism” representing the ongoing endeavour to ensure tourist destinations, products and services are accessible to all people, regardless of their physical limitations, disabilities or age, the current infrastructure in Sofia can be defined as *is process of significant and continuous improvement* in terms of accessibility. When it comes to legal and strategical framework the capital has achieved compliance with the international norms; regarding the implementation of the framework – more work needs to be done for the **resilient construction of an accessible environment**, allowing active involvement of the tourists in the cultural life of the city, as well as its residents. However, in comparison with other Bulgarian and or/neighbouring cities, Sofia’s practical and theoretical concentration on the topic is much stronger, which has led to some important improvements in the infrastructure in the recent years, which have to be acknowledged.

In addition, the dynamics of the social dialogue towards the topic has to be enhanced, allowing more people to engage purposefully in the problematic, thus strengthening their civil position and role in the society.

▪ *Attractions*

The second criterion is directly related to the existence, maintenance and development of natural and cultural resources, situated in the particular area; it involves opportunities for meaningful distribution of the visitors’ time and is one of the most important factor for their overall evaluation of stay, incorporating elements such as: availability, location, access, price-quality-ratio, etc. Furthermore, the criterion implies a certain responsibility in the context of the global situation towards the exploitation manner of natural and cultural heritage and strongly focus on sustainability as a rightful framework for tourism development.



Definition:

Sustainable Tourism involves social responsibility, a strong commitment to nature and the integration of local people in any tourist operation or development. Sustainable tourism is defined by the World Tourism Organisation (WTO), the Tourism Council (WTTC) and the Earth Council as:

“Sustainable Tourism Development meets the needs of present tourists, host regions while protecting and enhancing opportunity for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems. Sustainable tourism products are products which are operated in harmony with the local environment, community and cultures so that these become the beneficiaries not the victims of tourism development.”

The city of Sofia as natural, social and cultural centre of Sofia is characterized by a rich variety of attractions, which is one of the reasons for its high development rate during the years – tourism is an important factor for the socio-economic status of an area. The city offers content of solid quality, example of which are the opportunities for sightseeing, various tours, cultural manifestations and events, satisfactory quality of services and competitive price.

Sofia is Bulgaria’s capital and its largest city. Founded thousands of years ago, today the city continues to develop as the country’s cultural and economic center. At present, the city has a population of 1,250,000.

Sofia preserves many valuable monuments to its long and storied past. Visitors exploring the city’s streets can see remnants of The Eastern Gate from the days when Sofia was Serdika and Sredets, dating from the 2nd-4th centuries CE. These remains are exhibited in the underpass connecting the Presidential Palace and The Ministerial Council, surrounded by shops selling traditional Bulgarian souvenirs and rosewater.

- The Saint Sofia Basilica, founded during the reign of Justinian (reign 527-565), is one of the oldest churches in the capital. It was the city’s major church during the Middle Ages, and under the Ottomans it was used as a mosque. Very close to Saint Sofia is The Memorial Church Saint Alexander Nevsky, now one of the city’s most recognizable symbols. This church was built in 1912, and was designed by the Russian architect Alexander Pomerantsev. Its bell tower rises to a height of 53 meters, and houses 53 bells, the heaviest weighing 10 tons. One of the most popular tourist destinations in Sofia, the church can hold roughly 5,000 people, and on important Christian holidays it is filled with believers. In the church’s crypt, there is an exhibit of Orthodox Christian art. Directly across from the church is The National Gallery of Art, which often exhibits works by world-famous artists.



- Masterpieces of Bulgarian painting are on display at The National Art Gallery, located in what was formerly the Bulgarian Royal Palace. The National Museum of Ethnography is also located here, and The Museum of Natural History is a very short distance away, with exhibits of plants and animals that are very valuable, and even some that can no longer be seen in the wild. Right in front of this museum is The Saint Nikolai Church, which is an architectural landmark. The Parliament Building, Monument to the Liberator (in honor of the Russian Tsar Alexander II, who was instrumental in freeing Bulgaria from Ottoman rule), and the campus of Sofia University “Saint Kliment Ohridski” are three more of the city’s major symbols. Without a doubt, one of the most beautiful buildings in Sofia is The Ivan Vazov National Theater.
- On the lower slopes of Mount Vitosha, in the Boyana District, is located The National Museum of History, with its collection from prehistoric times to the present day. The museum has one of the largest collections anywhere, with over 700,000 items of cultural importance. Close to the museum is The Boyana Church, one of the Bulgarian monuments that is listed among the UNESCO World Heritage sites.

Since it is the nation’s capital, Sofia constantly plays host to important cultural and musical events, conferences, and sports competitions. The National Palace of Culture, the city’s football stadiums, and the city’s large halls are venues for concerts and performances by famous individuals and groups.

During the months of May and June, The Palace of Culture will welcome performers participating in the festival “Sofia Music Weeks.” The capital’s many theaters and galleries offer a wide range of interesting exhibits and shows.

The city is a preferred destination for international congresses, and there are a great many halls and centers offering possibilities for every need. For example, one of the city’s most popular venues for business forums and trade fairs is The National Palace of Culture.

Sofia is also home to Bulgaria’s most prestigious and largest educational institutions – universities, colleges, and middle schools that offer solidly-grounded, up-to-date instruction in such disciplines as Architecture, Medicine, The Humanities, Engineering, Music and Choreography, and Fine Arts.

- Near Sofia, in the Vitosha, Lozen, and Stara Planina (Central Balkan) Mountains, over the centuries so many monasteries have been founded that they came to be known as Sofia’s Holy Mountains. They can be considered as a single complex, and played an important role in preserving the Bulgarian spiritual heritage during the centuries of Ottoman occupation. Still



standing are The Dragalevski, Lozen, Germanski, Kremikovski, Cherepishki, and Osenovlashki Monasteries, among others.

- *Staying conditions*

“Accommodation and local food play a critical role in shaping international visitors’ quality of experience at a destination, along with other key influential tangible and intangible factors (safety, environment, locals hospitality...)”

The staying condition criterion consists of the different services and products provided for the domestic and foreign tourists at a certain destination; it includes: location, parking space, extra fees, number of stars, facilities, accuracy of the information, reviews, feedback, etc.

Since 2009, the hotel services market in Sofia has shown a steady growth in the number of arriving tourists as well as in the number and revenues of the nights spent. The trend is particularly visible in 2016 and in the first nine months of 2017 and is expected to continue in the next.

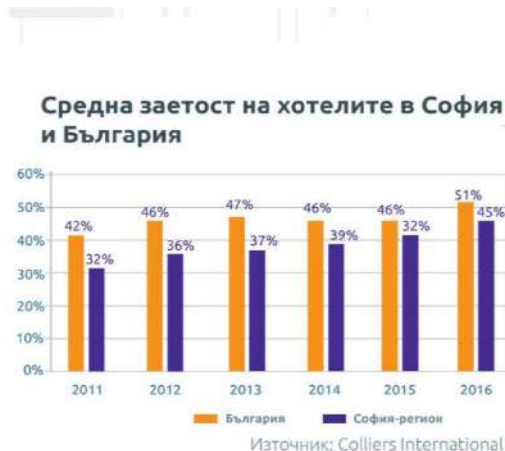
Increased occupancy of accommodation facilities results in an increase in Revenue from Available Rooms (RevPAR), although this indicator remains one of the lowest among European Capitals.

In recent years, increased economic activity in Sofia has been an important factor for the stable development of the hotel business in the capital. However, it remains significantly less developed than other European cities.

Figure 2. Total number of the accommodations (4 and 5 star hotels)

Figure 3. Average occupancy rate of the hotels in Sofia

Source: Colliers International

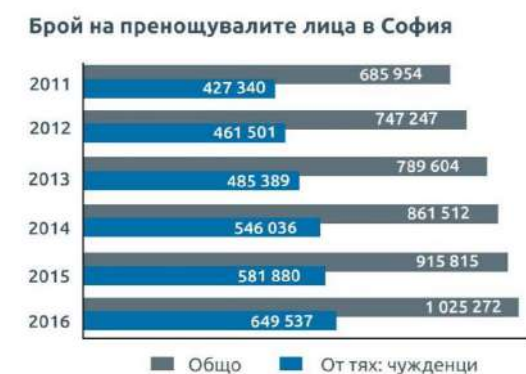


The average daily rate (ADR) in Sofia for 4 and 5-star hotels is 46 euro, and employment reaches 45%, continuing the steady growth trend. For the period 2013-2016, the ADR in 4 and 5-star hotels has steadily increased by approximately EUR 1 per year and employment in accommodation increased from 37% to 45%. Revenue in 2016 is 49.5 million euros. However, both the ADR and the occupancy rates of the hotels in Sofia remain among the lowest in the continent.

Figure 4. Number of the people with overnight stay in Sofia

Figure 5. Number of realized nights in Sofia

Figure 6. Revenues from realized nights in Sofia



*Total number (in grey)

*Foreigners (in green)



The successful website airbnb.com is actually the biggest hotel in Sofia. With 409 accommodations offered in the city (additional 120 around Sofia), it has over 1700 beds (as of 03.04.2015). This is between 7-8% of the market in Sofia.

- 40% more available offers than 1 year ago;

Most of the airbnb offers are entire apartments – the real estate industry has found a new market. The average price of the apartments is Euro 43. Compared to the hotel market the difference in price is very small. The lowest price offered for accommodation is Euro 8 and the most expensive is 399 Euros per night. Because of this small price difference compared with the hotel prices, the occupancy rates of the airbnb apartments, compared to other cities, are very low. It is surprising that, compared to other cities, airbnb is not discussed within the local hotel industry, even though it is already taking an important part of the increasing demand.

Accommodation in the Sofia region in July 2017

(data from the National Statistical Institute of Bulgaria and Vision for Sofia Report)

In July 2017 there were 101 accommodations in the Sofia region with a total of 7,620 beds. Compared to July 2016, the total number of Sofia accommodation (operating during the period) decreased by 5.6%, with the number of places of category 1 and 2 stars (by 9.1%) decreasing most,



followed by 3-star category accommodation (4.0%), while the number of 4 and 5 star places increased by 6.3%.

Revenue from accommodation in July 2017 is over BGN 2 008.7 thousand, with 78.1% of it coming from the income of overnight stays of Bulgarian citizens.

Compared to July 2016, Sofia's overnight accommodation revenues grew by 18.4%, while the overnight stays of Bulgarian citizens grew by 18.2% and that of foreigners by 19.4%.

In July 2017 compared to the same month of the previous year in the resort complex Borovets, the Bulgarian residents in the accommodation places were 6.8% more and their overnight stays increased by 8.2% and the overnight stays of Bulgarian citizens in the resort also increased by 14.2%. Compared to the same month of 2016, foreign citizens staying in the Borovets ski resorts are 0.1% less, with 22.0% more nights and their revenues by 41.9% more.

In recent years the city has attracted tourists from all over the world, **as guests of Sofia are most often citizens of other European countries** - Italy, Spain, Great Britain, Germany, Greece and even Latvia, but there are also no visitors from the Asian countries. The largest share of foreign tourists is occupied by Germany, Greece, Great Britain, Italy, Israel.

For 2016, the greatest growth of Spanish guests in the city - 47.27% compared to the previous year. For tourists from Israel, the growth is 30.6%, and for the Chinese - by 20.7%. For the year 2017 the largest number of foreign tourists in Sofia are from Germany, Greece, Great Britain, Italy and Israel. The highest number of nights was realized by Italian tourists - 104 886, or 7.7%. The second place is the English, and the third - the German tourists, who backed the top spot in the ranking for the first time since 2013.

As far as accommodation is concerned, the highest growth of foreigners by number of nights spent in accommodation places is reported in single star categories - 53.4%, and secondly, hotels with a 3 stars category with 27.7 %. Hotels with 4 and 5 stars, which have a very small difference in prices, rely heavily on business tourism, accounting for only 12.8% of the total.

The analysis shows that a large number of new tourists prefer to stay in low-end hotels and apartments for rent. As a whole, foreigners mostly choose hotels for their stay, secondly - family hotels, and thirdly - apartments.

Regarding the tourism directions, which are laid down in the strategic documents of the municipality, the prioritized direction is the cultural-cognitive tourism, followed by the business tourism. Attention is drawn to mountain and green tourism, but the development of this direction still does not correspond to the capital's potential. The same conclusion can be made for adventure tourism, spa tourism and religious tourism. The focus on business tourism is understandable because they are high-cost tourists who are high-class and entertaining, but their character is seasonal and the share is



insufficient to maintain a good tourist ecosystem. Of course, against the backdrop of the historical and cultural attractions of the city, culture-cognitive tourism remains a priority for Sofia.

Visitors to the city are most pleased with the opportunities for entertainment, historical sights and cultural life in the capital, and the infrastructure for cycling and parking is the lowest rating. The city's guests give a rather high average of 4.1 out of 5 for their visit, and 68% of all respondents are not the first stay in Sofia. An indisputable conclusion from all research and analysis is that Sofia is tempting tourists from all over the world, one of the reasons being the price-quality ratio, which is key to the growth of tourism in the city at this stage.

Countries with the most business visits to Bulgaria are Romania, Greece, Turkey, Serbia and Germany, and for the purpose "Vacation" capital visit most Italy, Britain, Israel, Greece, Germany. In the last two years there has been a strong growth of tourists from Spain and Spain China, and the latest data from 2017 show strong growth for tourists from Netherlands, Ireland, Belgium, Sweden.

At the same time, the marketing activities related to the promotion of the city of Sofia, are not fully consistent with the strategic development directions of the tourism in the city and the most priority international markets that visit it.

In summation:

- The biggest city and Bulgaria and a capital with rich cultural and natural heritage;
- Simultaneously ancient, modern and cosmopolitan city;
- Positioned in the European and world cultural calendar as attractive tourism destination;
- Functioning transport infrastructure, but with a need for active modernization and development; internal deficiencies with requirement to be addressed in order to further strengthen the potential of the city to attract international tourists;
- Well-maintained accommodation structure with many opportunities for a qualitative stay at competitive prices;
- Existence of highly developed and communicated parts of the city in contrast with ones that present a limited number of tourism resources and services and/or are extremely excommunicated – unsymmetrical city infrastructure in terms of tourism development;
- Active cultural calendar, although with a strong need for more inclusivity – there are some opportunities for engagement for example theatrical performances in English, however the



scope is limited and not enough visitors can be constructively reached, mainly due to the language barrier

- Market-oriented tourism based on natural and cultural heritage of European and world importance and developed internet presentation of traditional and alternative tourism products and services;
- Relatively sustainable general tourism infrastructure: accommodation, tour operators, facilities and services;

Cultural tourism in Sofia – overview (resources, interest to the sites, management)

Sofia is one of the oldest European capitals. The first permanent settlements of the territory of today's city arose even in the 7th millennium BC, when the Neolithic Revolution enters Europe through the Balkans. The city is characterized by **stylistic, religious and ethnic pluralism of cultural heritage** and offers areas in which different religions, ethnicities and cultures co-exist harmoniously.

A total of 1720 sites on the territory of Sofia Municipality are registered as important cultural assets, of which 830 are located in the central part of the city and 110 are of national importance.

There are also a number of preserved industrial buildings, which, apart from their cultural values, continue to perform certain economic functions; the territories of the area outside the administrative center are rich of sites of cultural heritage - among them with of particular significance is the agglomeration of the monasteries of the so- "Sofiyska Sveta Gora".

Sofia is a city with a rich and dynamic contemporary cultural life. The cultural calendar offers a host of renowned and established international festivals and cultural events with the potential to attract

Main strategic objective in the Regional Strategy for Development of Sofia-City 2014-2020:

Turning Sofia District into a sustainable and balanced developing region; economic, political, cultural and scientific center with a high standard of living and with strategic importance in the national and European urban polycentric network.



more and more interest from Bulgarian and foreign audience. The diversity of cultural life in Sofia is not limited to the festivals, as the city offers a wide range of cultural events every day in many theatres, galleries, cinemas, concert halls and alternative cultural spaces of the city.

Important factor of advantage is that in the capital are located around 9% of the country's libraries; 28 museums out of 229 for the country; over 60 galleries of which 2 are national and 1 urban; 31 cinemas, over 120 small educational centers.

Sofia is a national center of cultural and creative industries. The main metrics for economic importance of the cultural and creative industries show a concentration of between 49% to 92% in the city for different industries. In the arts, cultural and creative industries in Bulgaria 93,323 people are employed (3.4% of the employed in the national economy) 54 293 of them have chosen Sofia as their working environment.

At the same time Sofia is a city of alternative cultural spaces, divided conditionally in four categories that are often intertwined: minority sites, hidden architectural landmarks, places of urban importance and places of alternative artistic production and consumption. Alternative cultural spaces contribute to the formation of the specific identity of the city, successfully balancing between the formality of the business culture and the spontaneity, inherent to the artistic expression.

The local authorities promote the creative image of Sofia through financing of various projects and cultural initiatives, rational maintenance of the cultural calendar of the municipality and participation in European programmes, focused on the cultural problematic.

Today Sofia is a city of open spaces where people can stand side by side with different attitudes, cultures, religions, attitudes. In the very center of the city, close to each other, are located four temples: a mosque, a synagogue, an Orthodox church and a Catholic prayer home, which form a peculiar quadrangle of mutual respect among people who profess different religions.

Nevertheless, there are some problems which characterize the cultural reality of Sofia that can be categorized as follows:

- Despite the rich variety of cultural events, Sofia still needs more modern halls as well as cultural centers in the undeveloped parts of the city to create a quality tourism product;
- There are not enough active and consistent policies to attract new audiences, including through educational programs and use of new technologies;
- There is still a lack of relevant spaces for in-depth debates on important issues for the development of culture;



- There is no built environment, stimulating greater synergy between institutions and sectors, exchange of experience and joint problem solving. Sofia does not use its full capacity to establish sustainable and working international partnerships;
- Sofia has no clear and recognizable image on an international level;
- Systematic activities are needed for the establishment of a system for advertising the rich cultural and historical heritage and contemporary cultural life in Sofia;

Adventure tourism in Sofia – overview (resources, interest to the sites, management)



Adventure travel is a type of niche tourism, involving exploration or travel with a certain degree of risk (real or perceived), and which may require special skills and physical exertion.

Adventure tourists may have the motivation to achieve mental states characterized as rush or flow, resulting from stepping outside their comfort zone. This may be from experiencing culture shock or by performing acts requiring significant effort and involve some degree of risk (real or perceived) and/or physical danger (See extreme sports). This may include activities such as mountaineering, trekking, bungee jumping, mountain biking, cycling, canoeing, scuba diving, rafting, kayaking, zip-lining, paragliding, hiking, exploring, sandboarding, caving and rock climbing. Some obscure forms of adventure travel include disaster and ghetto tourism. Other rising forms of adventure travel include social and jungle tourism.

Analysis of the resources for the development of adventure tourism in the city of Sofia:

- an attractive destination for people with an inclination for adventure ;



- the resources for the development of adventure tourism in Sofia include: rivers, mountains, lakes, waterfalls, forests, cliffs, etc.;
- the activities available, related to the development of adventure tourism include, but are not limited to: hiking, biking, kayaking, rafting, horse riding, paragliding;
- Competitive prices;

Some of the most significant natural resources for the development of adventure tourism in the area are:

- Vitosha Mountain (hiking, biking, paragliding, horse riding)

Vitosha Mountain is the oldest nature park on the Balkan Peninsula. Its gorgeous silhouette is visible from almost all positions in the city and is inseparable part of Sofia' image. In 1934 with the active involvement of the Bulgarian nature-conservation society, part of the mountain of 6,600 ha was declared a park. Its boundaries have been changed many times and today encompass the entire mountain of 27,079 ha area. On the park's territory 61 types of habitats were identified; among them of greatest interest as far as nature conservation goes are the natural spruce forests, the peat areas, the moraines and the caves.

Vitosha flora includes all vegetation zones characteristic of the Bulgarian mountains, except the alpine one. The park is habitation of a plenty of Balkan endemics, and the globular yellow blossoms of the Vitosha tulip (*Trollius europaeus*) can be seen on the open high-mountain parts. The number of orchid species found on its territory counts to 30. The mountain is home of a diversity of bigger and smaller mammals, birds, insects, reptiles and amphibians. In the different seasons 200 bird species can be observed in Mount Vitosha, of them 120 species nesting within the park's territory.

Typical inhabitants of the spruce forests are the nutcracker (*Nucifraga caryocatactes*), coal tit (*Parus ater*), common crossbill (*Loxia curvirostra*), etc. The longest cave in Bulgaria, Duhlata, is also situated in Mount Vitosha: it is a natural attraction with galleries of around 18-kilometre length placed at 6 cave levels.

Sofia is the single European capital in the vicinity of which brown bear lives. Since 2002 the park's administration successfully carries out a project of reviving of the Balkan wild goat, a species that perished in the mountain more than 100 years ago. On establishing the park, some of the earliest reserves in Bulgaria – Bistrishko Branishte and Torfeno Branishte were set up.



Located on the north-eastern slope of Mount Vitosha, **Bistrishko Branishte Reserve** was established with the aim to preserve in their natural condition high-mountain spruce forests, sub-alpine grass cohabitations, rock formations and stone rivers. In 1977 the reserve was defined as a biosphere reserve according to UNESCO's international Man and Biosphere Program. The largest in Bulgaria compound of high mountain peat areas with its characteristic hydrophilic vegetation and extraordinary water-holding qualities is preserved in the Torfeno Branishte Reserve.

Climbing Mount Vitosha was the purpose of the first organized tourist society in Bulgaria. The tourist movement in Bulgaria has been set up with the climbing of the Cherni Vrah Peak, the summit of Mount Vitosha, on 27 August 1895 organized by writer Aleko Konstantinov. Today the park is furnished with a well-built tourist infrastructure of paths and alleys of over 300 km total length. The mountain provides excellent conditions for trekking all the year round, ski sport in all of its varieties (there are 6 ski-run of 13.6 km total length), rock and ice climbing, paragliding, mountain biking, riding tours, and also for alternative, environment-friendly winter sports, such as snow-kiting, kite-winging, etc. There are a lot of mountain chalets and hotels in the northern part, the chalets being the following: Aleko, Selimitsa, Kumata, Fonfon, Tintyava, Edelweiss, Momina Skala.

The most familiar tourist routes start from points at Knyazhevo and Dragalevtsi Quarters leading to Aleko locality below the Cherni Vrah Peak, Zlatnite Mostove and Kopitoto localities. More information about the public transport to Vitosha and useful telephone numbers you will find in the Useful Information Section of this guide.

Vitosha Nature Park is the most frequented protected territory in Bulgaria, and due to its proximity to Sofia it has turned into a site of education in responsible attitude towards nature. The park is preferable place for carrying out green and sports schools for children. In the recent years a lot of information centers and alleys were built in it. The nature conservation center in Dragalevtsi, the Museum of Bear in the Dendrarium Locality, the Museum of Dragon Fly and the House of Owlets in the locality of Belite Brezi, the information alley about the peat areas in the Ofeliyte locality, the dendrological alley arranged for blind people, and the Interpretative Center for children in the Dendrarium Locality function for all fans of nature. In the area of Igljikina Polyana a special alley adapted to people with locomotors-system disorders is built.

- Iskar river (rafting and kayaking)

The Iskar is 352 km long, which makes it the longest river that runs entirely within the territory of Bulgaria. The Danube and the Maritsa rivers are both longer but they also flow through other countries. The Iskar is a tributary to the Danube and forms part of the Black Sea river basin. It is the only river that takes its source in southern Bulgaria and flows north through the Balkan Mountains that form the water divide between the basins of the Black Sea to the north and the Aegean Sea to



south. In terms of geology, the Iskar is the oldest river in the Balkans and also the only one to have preserved its original direction despite the significant geological changes in later stages. The Iskar basin spans a territory of 8,646 km² in six Bulgarian provinces, Sofia, Sofia City, Vratsa, Lovech and Pleven, with a total population of about 1,600,000 people. The most significant right tributaries from south to north are the Lesnovska River (65 km), Malki Iskar (85 km) and Zlatna Panega (50 km); the largest left tributaries are the Palakaria (39 km), Vitoshka Bistritsa (12 km) and Perlovska (31 km).

The river stands close to Sofia and offers excellent conditions for wild water rafting.

Seasons suitable for rafting: from April till July and from October till November – high water level. August and September – low water level.

Kayaking down the Iskar River is suitable for lovers of more emotional adventures and can be exercised in late spring, summer and autumn.

Suitable kayaking spots in the defile are:

- Tserovo - Lakatnik: this area is characterized with the most adrenaline route, which is also suitable for rafting downhill.
 - Olive-Eliseyna: The route is of medium difficulty to be extended to the area of Zverino.
 - Cherepish Monastery - Lyuty Brod: with medium difficulty; passing under the Cherepish Rocks and along the Cherepish Monastery.
-
- Vitinya (Bungee Jumping)

Vitinya Pass is a mountain pass in the Balkan Mountains (Stara Planina) in Bulgaria. It connects Sofia and Botevgrad. The Hemus motorway passes it in a tunnel just below the summit. The motorway includes a notable girder bridge called the Bebresh Viaduct.

In the Vitinya Pass, 42 km. from Sofia, is the highest bridge from which bungee jumps in Bulgaria - 120m. The free fall is 32 meters. Interestingly, the Bebresh Bridge is the highest bridge on the Balkan Peninsula. This makes it attractive for bungee jumpers from neighboring countries.



Speleology tourism in Sofia – overview (resources, interest to the sites, management)



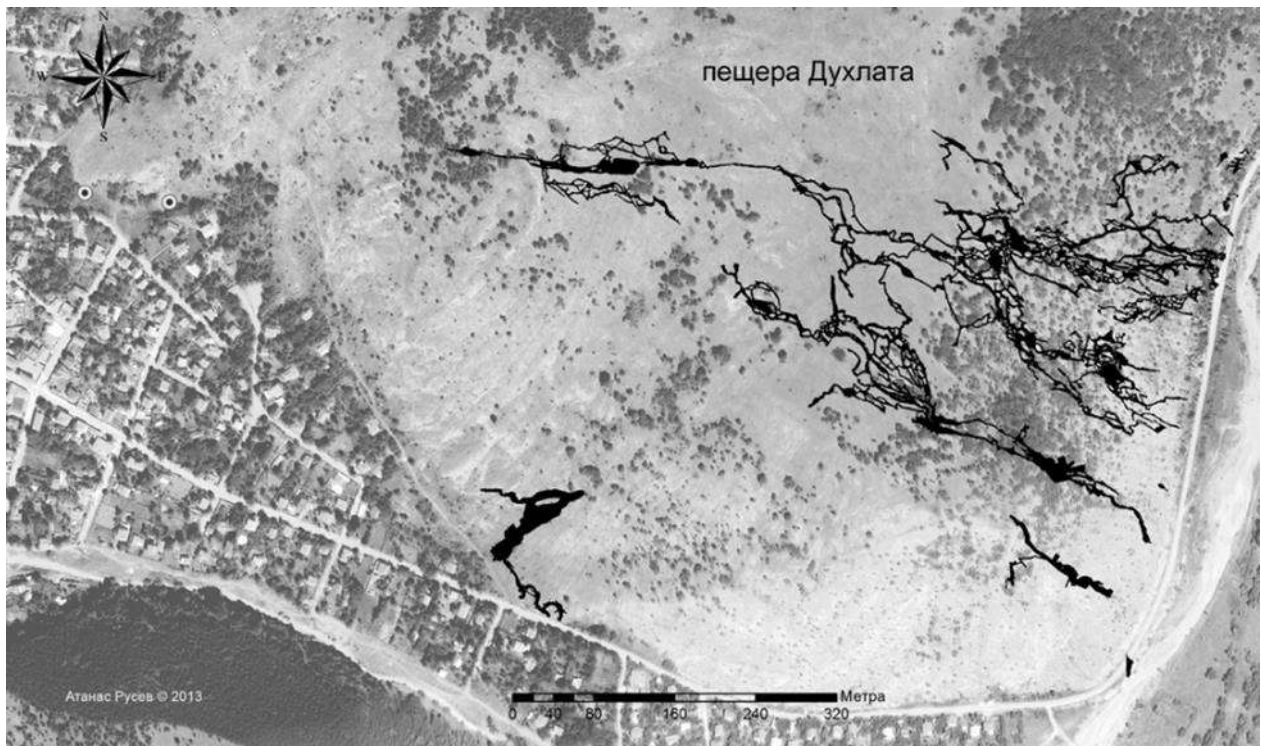
Speleology is the scientific study of caves and other karst features, their make-up, structure, physical properties, history, life forms, and the processes by which they form (speleogenesis) and change over time (speleomorphology). The term speleology is also sometimes applied to the recreational activity of exploring caves, but this is more properly known as caving or potholing, or (not usually by participants) by the largely obsolete American term spelunking. Speleology and caving are often connected, as the physical skills required for in situ study are the same.

Caving as a tourist offer is focused on the tourists with a great love for the study and teaching of underground karst phenomena such as caves and pits, as well as unusual and rare plant and animal species. Cavers caving made plans based on the measurement of dimensions and providing cave channels, as well as documentation of morphological, hydrological, geological and physical properties. Given the activity of cavers to deep and complex holes and special caving techniques and training caving team, we can say that part of caving activities like mountain climbing and can be considered a sport activity. For the purposes of tourism, caves and pits are often tailored to the tourists so that tourists, if they decide to speleological research or I visit some of the caves or cave, often go accompanied by guides who are trained to navigate the caves that tourists do not get lost or jeopardized. Known caves often have other tourist offer such as souvenir shop, a place for a meal or refreshment.

The modern study of the caves at the **Bosnian Karst region** dates back to the 1960s. At that time, enthusiastic young researchers – from the Academic Cave Club began exploring the Duhlata cave, the longest cave in Bulgaria - over 18 km. cave galleries. In the 70s, many new discoveries were made in the Duhlata cave, as well as new large caves in the region - Akademik, Cinderella, Living Water, Chuchulian and others.

- Duhlata is one of the most beautiful caves in Bulgaria with almost all types of secondary karst formations occurring in Bulgaria. Penetration in the cave requires special skills and a mandatory guide and a labyrinthian connoisseur. This is the cave where most rescue operations were carried out in Bulgaria.

Biology: The cave has 22 cave species, including 6 bat species.



Map of the Duhlata Cave by 2013 (1962-2014, compiled by: Academia SPC, Club Extreme, etc.)

The Bosnian karst region is located in the Vitosha Mountain and is the most remarkable karst region in the Balkans. There are no traces of hydrothermal processes in this region. Karstivite spring "The Living Water" is in the area of the village of Bosnek in Vitosha. From this "fountain of happiness", according to a seventeenth century tradition, only the righteous drank, "but the sinners refused." In the vicinity of Bosnek is the longest cave in Bulgaria - Duhlata. It has been explored 15 km, with over 50 halls, each with an area of more than 50 square meters. Other karst springs in the region are "Vreloto" and "Popov izvor". The karst spring "Vreloto" (350 l/s) was found to draw its water from the Struma River.



- Vreloto Cave

Coordinates: N 42.515312, E 23.159941, WGS_1984_UTM_Zone_35N

Description and history of the discovery: The cave Vreloto is one of the most interesting caves in Bulgaria with a length of about 8 km and a denivelation of +105 m.

It is a water cave on several floors, with huge blocks and collapses, underground halls and unique cave formations. The spring "Vreloto" along with "Popov izvor" are the two biggest karst springs in the Bosnian karst region. After almost five years of hard work by various clubs, on 15.11.1980 for the first time in the "Vreloto" penetrated Maria Zlatkova, Mario and Emil Stoyanov. Across the underground river, in a large and wide gallery, they reach a siphon, about 820 meters from the entrance. Several expeditions to the siphon end result in failure due to poor visibility due to the depth of the siphon. Gradually, interest in the cave is diminishing.

The penetration of the cave is extremely difficult and lengthy and it is recommended for very well prepared speleologists, in the first 200 m it enters into an underground river with a temperature of 7 degrees. Intrusions often last over 72 hours with the use of underground bearings. The exploration in the cave continues - a probable length of undiscovered galleries - over 80 km.

Biology: There are 5 types of cave animals found in the cave, including 2 bat species.



Map of the Vreloto cave (1980 - 2014, source Club Extreme)

- PPD Cave

Coordinates: N 42.500889, E 23.20775, WGS_1984_UTM_Zone_35N



Access: It is about 3 km from the village of Bosnek on the road to Chipepetlovo village in Torrev rid, the second entrance of the cave is located about 50m to the north, above the road itself. There are no signs or a path to the entrances.

Description: The cave POP is one of the most difficult for penetration in Bulgaria with a length of 1.8 km and a displacement of -110 m. opened and studied by Akademik club.

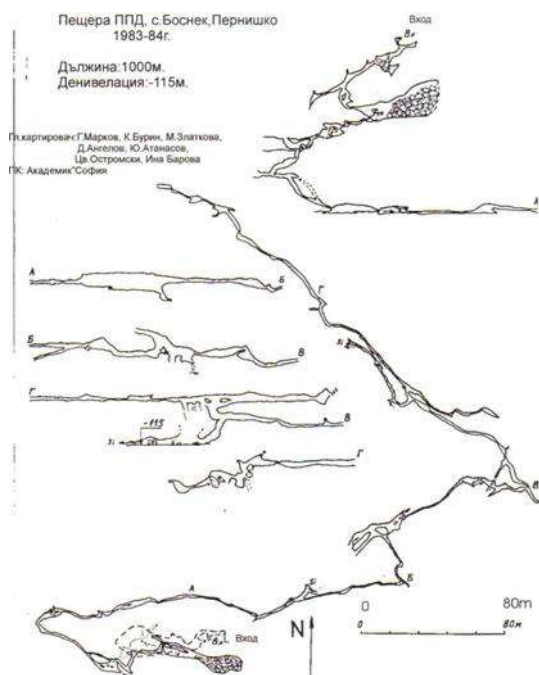
There are 2 entrances, PPD and "Entrance of the students", located about 40 m away from each other. Penetration in the cave is usually done through the entrance of the students as it saves several difficult stretches and narrows. Immediately after the entrance there is a upright that surrounds and falls into a hall, at the bottom of which follows a 8 m vertical ("1st ladder"), then it is overcome by a tangle and falls into a small hall. There is a gallery that goes back and falls on 2 plots of 10m ("2nd ladder"). Next comes a tight blocking and goes to "The Snare" - a new plummet of several meters. Here the cave becomes very wet and muddy. It continues down a descending tunnel and after descending 15m it falls on the Little River. The walls and the gallery are wet and muddy, and on the river after about 50m is reached the so-called. "Meat mincer" - a very narrow place about 15 meters long, which is very often filled with water and penetration is impossible.

After that the gallery continues along the river on narrow and difficult stretches and after about 350 m. The small river flows into a larger underground river coming from the east. The movement is in a narrow gallery about 10-20 meters above the river, with only a few places access to the underground river. After another 600m. is reached to the present end of the cave.

The cave is extremely heavy for penetration due to clay and water, which are almost everywhere.

Biology: In the cave there are 7 types of cave animals, including 4 bat species.

Access: The cave has free access for visits.



Map of the cave PPD (Source: SPK Academic)

For the development of speleology and speleo tourism in Vitosha NP it is necessary to be undertaken a number of actions and procedures.

Firstly, it is the promotion of the activity and attraction of interest by citizens and institutions. At the same time, it should be taken into consideration that caves are an extremely fragile ecosystems and that the uncontrolled access can cause irreparable and irreversible damage. It would be useful to present the whole information about the known caves in by establishing Information Centers to serve as a basic unit in the future popularization of speleology and speleo tourism in Vitosha NP.

In this center training, lectures, conferences, etc. can be organized. The caves designation is also important- the roads to them on the surface, as well as detailed information about them. With regard to the protection of caves, it is an urgent matter.

A coherent plan for rescue operations should be elaborated and a clear identification of the responsible institutions for the rescue activities in the caves within the Vitosha Nature Park as the largest number of cave rescue operations have been carried out in this area. The attraction of the local population as an active participant in the organization and holding of speleological events, excursions, visits, etc. is also an important factor for development and interaction.



S.W.O.T regarding the development of the tourism sector in the City of Sofia with a focus on cultural, adventure and cave tourism

Strengths	Weaknesses	Opportunities	Threats
Membership of the EU since 2007;	Membership, characterized by various inherent deficits: Cooperation and Verification Mechanism –annual reports (The CVM is a safeguard measure invoked by the European Commission when a new member or acceding state of the European Union has failed to implement commitments undertaken in the context of the accession negotiations in the fields of freedom, security and justice or internal market policy)	A more constructive membership of the EU, including Eurozone and Schengen integration, resulting in more resilient position in the Community;	Continuous dysfunctionality of the membership; negative CVM reports; deterioration of the perspectives for integration in Eurozone and Schengen;
Resilient culture with variety of traditions and customs, able to attract visitors and to ensure consistency in their experience	Lack of resiliency of the recognisability and limited presence on the international market;	Active exploration of the untapped potentials by comprehensive analysis of the international market and the tourists expectations, resulting in a thorough strategy for the popularization of the City of Sofia (incl.	High level of commercialization, degradation of local identity and marginalization of the “essence” at the expense of the short –term intensification of tourists presence, resulting in



		implementation of a new marketing approach)	immediate profits; loss of perspective and long-lasting vision
High accessibility by transport means: functioning airport, railway and road infrastructure	Road and railway infrastructure: insufficient speed, low-maintenance when it comes to internal conditions, limited modernization activities; low culture of compliance with the established transport rules (speed infringements, etc.)	Modernization of the existing transport means and infrastructure; implementation of new services; better compliance with the established rules through more awareness raising campaigns or higher sanctions/new rules	Focus on the quantity instead of the quality; malpractices in terms of repair of the existing infrastructure or construction of new routes; unproportional development of the different transportation means on the expense of the others; dissatisfaction and public resentment towards the new rules, sanctions.
Competitive prices in comparison with cities in Western and Northern Europe;	Prices similar to the ones in cities in Central and Eastern Europe, which circumstance deprives Sofia of important advantage	Improving the quality of the tourist offer, active development of the natural and cultural heritage as factors with great significance among tourists (in accordance with Eurostat survey), so that the price factor is not the leading one	Artificial lowering of the prices, which can result negatively for the employees in the tourism sector and all other industries of relevance; improving the quality and the scope of the services, but not increasing the wages of the employees; implementation of short-term strategies and loss of a long-lasting vision for development;
Unspoiled natural scenery	Not enough facilities available at the disposal of children, people with limited physical abilities and elderly; low	Improving the quality of the sites with facilities at the disposal of children, people with limited physical activities,	Spoiling of the environment with view of immediate profits, unregulated construction work,



	compliance with safety standards in some areas	elderly; enhancing the compliance with the safety standards and educating citizens and tourists on the topic of safety	unsystematic development without consideration of the future; marginalization of the concept of sustainable tourism
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PART IV

Construction of a shared tourism identity of Sofia, Montana and Nis: strengths, weaknesses, opportunities and threats

The conclusions from the analyses determine the necessity to stimulate the partnership between the municipal administrations of Sofia, Montana and Nis which according to the national legislation, geographic location and specificity of the tourist product possess the potential to formulate, develop and manage the joint region as a shared tourism space of value and international significance.

The characteristics of the region, benefiting the establishment of a framework of vibrant cooperation are:

- Territorial proximity - the municipalities have a similar geographic location and because of their neighbourhood relations they share some common issues;
- Intertwinity and complementarity of natural resources and sites: this includes important factors such as relief forms and climate (with minimal intra-regional differences), biodiversity and protected areas;
- Anthropogenic resources - a unique resource for the region is the rich material cultural heritage, belonging to a folklore, common crafts, traditions, lifestyle, traditional livelihoods;
- General infrastructure - the municipalities in the area share common roads on the national road network which, combined with their geographical location, is a suitable territorial basis for the formation of a tourist products of various type;

In addition, from the individual analysis of the resources for the development of cultural, adventure and speleology tourism can be concluded that all three cities are in position to construct themselves as a destinations with serious capacity and dynamic presence in the European reality; their



differences – existing evidently, for example unproportional levels of development and unbalanced economic indicators, add further value to the partnership as it can contribute for the achievement of the general aim for cohesion profoundly explored by the European community.

The Regional policy of the European Union (EU), also referred as Cohesion Policy, is a policy with the stated aim of improving the economic well-being of regions in the EU and to avoid regional disparities. More than one third of the EU's budget is devoted to this policy, which aims to remove economic, social and territorial disparities across the EU, restructure declining industrial areas and diversify rural areas which have declining agriculture. In doing so, EU regional policy is geared towards making regions more competitive, fostering economic growth and creating new jobs. The policy also has a role to play in wider challenges for the future, including climate change, energy supply and globalisation.

Sources for differentiation:

As stated above, the three cities – Montana, Sofia and Nis cannot be characterized by homogeneity when it comes to their positioning in the international tourism market; all attempts for generalization will fail as the socio-economic realities of the territories differ substantially: for example Sofia as European capital has faced a tendency for growth and has reached a certain stability as a tourism destination in the recent years in contrast to Montana which as part of the North-West region¹⁰ is subject to various negative tendencies such as unemployment, depopulation,

¹⁰ In 2015, regional GDP per capita, expressed in terms of purchasing power standards, ranged from slightly less than 30% of the European Union (EU) average in the Bulgarian North West Region to 580% of the average in Inner London - West in the United Kingdom, according to Eurostat survey.

After North West in Bulgaria (29% of the average), the lowest regions in the ranking were Mayotte in France (32%), North Central and South Central in Bulgaria (both 33%) and Nord-Est in Romania (34%).



serious investments deficiency, etc. and is steadily deteriorating in terms of important economic indicators. Unlike Sofia and Montana - cities of contrariety, Nis can be placed somewhere in the middle as it has an inclination for gradual advancement due to the systematic efforts of the local authorities, as well as existence of external stimulus such as different programmes, funds, etc., but still some malpractices and internal deficiencies need to be addressed for its active and recognisable presence in the international tourism reality.

Cooperation as a factor for greater competitiveness

With the launch of a joint tourism product, each of the municipalities enhances the competitiveness of its tourism sector by:

- Increased visibility and market recognition – the unification of the three municipalities in a common destination is a prerequisite for the general strengthening of their visibility and recognition on the international market; however individual responsibility remains existent as each of the cities needs to address some specific issues in order to be able to participate in a constructive partnership.
- Complementarity of the tourist products - in addition to the general supply, each municipality has a specific feature/resource/advantage that could complement and diversify the regional product – Sofia (suitable for the development of cultural tourism), Nis and Montana (abundant in resources for the development of adventure tourism), Nis as a part of a more exotic (*as the unknown has the tendency to provoke specific interest*) destination due to the fact that (i) Serbia is not currently part of the European Union therefore objectivity of perception towards the country is more difficult to be achieved, (ii) possess rich and eventful historic past and (iii) is part of a region in Europe, along with Bulgaria that is culturally distinguishable when compared to the cultural reality of other part of the continent; Sofia as capital of one of the newest members of the EU with competitive prices and qualitative, yet insufficiently explored tourism offer.

SWOT analysis – cultural, adventure and speleology tourism in Nis, Sofia and Montana

Among the 19 regions with GDP per capita below 50% of the EU average, five were in Bulgaria, four each in Hungary and Poland, three in Romania, two in Greece and one in France.



SWOT analysis is a strategic planning tool which summarizes in a concise and succinct way the key aspects of a project, economic sector or a particular area. In planning procedures, SWOT analysis serves as a sublimation of all analytical findings for the purpose of defining strategic starting points, the vision and major strategies for further development.

In accordance with the meaning of the acronym (SWOT – Strengths, Weaknesses, Opportunities and Threats), the key analytical findings are classified into:

- a) Strengths - aspects which essentially give advantage over competitors;
- b) Weaknesses - impediments and aggravating circumstances for the development that need to be improved and overcome (if possible) or bypassed in a way that would allow for the adoption of strategic development directions to which these elements bear no relevance;
- c) Opportunities – elements and upcoming trends, primarily in the external environment, which can be used for creating competitive advantage;
- d) Threats – elements and upcoming trends, primarily in the external environment, which may render difficult or, in the long run, even prevent development.

SWOT analysis of the cultural, adventure and speleology tourism in Sofia, Montana and Nis is made on the basis of:

- 1) Overview of the general condition of the tourism industry in global and European perspective;
- 2) Overview of the general condition of the tourism industry in Bulgaria and Serbia;
- 3) Analysis of the current state of the tourism sector in Sofia, Montana and Nis;
- 4) Analysis of the specific condition of the cultural, adventure and speleology tourism in Sofia, Montana and Nis;
- 5) Analysis of development documents and official policies on tourism industry in the Republic of Serbia and the Republic of Bulgaria, as well as in the specific regions of Sofia, Montana and Nis;
- 6) Comparative analysis of the tourism industry (cultural, adventure, speleology) in Sofia, Montana and Nis;



Strengths:

- Shared historical past, intertwined culture and traditions, high mutual recognizability, viable framework for cooperation and development goals of similar character;
- Favorable geographic location and climate;
- Built transport infrastructure – high levels of connectivity via various transport means;
- Abundance of vibrant natural and cultural resources for the development of cultural, adventure and speleology tourism;
- Language barrier of low functionality;
- Competitive prices;
- Various existing platforms for constructive collaboration in different spheres of interest;
- Similar inclinations for positioning in the political reality: Bulgaria is part of the EU and the Republic of Serbia is country with strong perspective for accession;
- National and regional policies with corresponding general aim, specific objectives and measures to be undertaken;
- Acknowledged importance of the tourism industry for the socio-economic growth of the regions;
- Willingness for the establishment of shared tourism identity able to enhance the position of the cities in the international market;

Weaknesses:

- Different development rates and socio-economic indicators: employment, education, population trends, investments, etc.
- Heterogeneity when it comes to their positioning in the international tourism market;
- Sporadic political tensions and problematic history;
- High levels of malpractices and corruption tendencies, inherent to the very structure of the system of public relations (over-spill, the tourism sector as part of the economy cannot be independent from the processes that define its essence and peculiarity;)



- Similarity of the cultural tradition – simultaneously source of strength and weaknesses as not corresponding to the general demand of international tourists for constant witnessing of the new and the different;
- Deficiencies in the connectivity of the regions: need for modernization of the existing infrastructural network;
- Different currency which can fragmentate the experience of the visitors and to cause some inconveniences;
- Existence of negative tendencies in the development of strategic policies: unrecognized importance of critical thinking, short-term thinking, negligence of important indicators/tendencies and/ or prioritization of some on the expense of others, inclination for immediate benefit;
- Existence of negative trends in the implementation of strategic policies: lack of compliance with the established rules, distorted realization, deficiency in established mechanisms for monitoring and control;
- Dysfunctional public-private partnerships in the field of tourism;
- Disrupted dialogue and flawed process of communication between the authorities on the one hand and the citizens on the other;
- Stability of the region under conditionalities; no predictability of the counties/regions attitudes, defining the low investment rates;

Opportunities:

Method: a → b → c

a) Establishment of a vibrant dialogue of mutual understanding, respect and enhanced culture of constructive cooperation →

b) Formation of a platform for exchange of experience, ideas and good practices → c) Systematic efforts for the development of operational capacity for the implementation of programmes, strategies, initiatives, activities, etc. →



d) Elaboration of strategic long-term vision of inclusive character for the development of a joint tourism product → e) Eradication of malpractices and actual implementation of measures for the achievement of the elaborated strategic long-term perspective for tourism development →

f) Strengthened visibility and intensified recognizability of the three cities individually and collectively → g) Improved position in the international tourism market →

h) Dynamic investments in the modernization of the transport infrastructure → (i) increased accessibility of the three cities → (j) provoked interest → (k) increased tourism flow

→ (l) more stimulus for advancement of the tourism offer → (m) constructed joint tourism identity of the region through systematic and continuous efforts → (n) full utilization of the tourism potential of the region.

Thus leading to (i) Renewed dynamics of the cohesion processes → (ii) a more balanced standard of living → (iii) better utilization of the potential for development of the three cities → (iiii) construction of an attractive environment for local and foreign investments → substantial improvement of the socio-economic indicators of the cities, respectively the region leading to benefits for the local citizens and the two countries as well.

Threats:

- Inability to (i) formulate and (ii) follow strategic goals and specific measures for the achievement of the general objective – construction of a viable regional tourism identity, able to attract international visitors and to generate financial and non-financial benefits for the three cities and their citizens;
- Intensified tourist presence in result of the popularization of the region as a tourism destination, which could lead to environmental issues, including pollution, alteration of ecosystems, pressure on the biodiversity, uncontrolled construction, etc.;
- High level of commercialization, degradation of local identity and marginalization of the “essence” at the expense of the short –term intensification of tourist’s presence, resulting in immediate profits; loss of perspective and long-lasting vision;
- Focus on the quantity instead of the quality; malpractices in terms of repair of the existing infrastructure or construction of new routes; unproportional development of the different transportation means on the expense of the others; dissatisfaction and public resentment towards the new rules, further disruption of the public - private dialogue;



- Opening space for malpractices and corruption when dealing with the issue of insufficient accessibility; the urgency of the problem can be interpreted as an opportunity for quick and questionable measures in term of quality;
- Artificial lowering of the prices, which can result negatively for the employees in the tourism sector and all other industries of relevance; improving the quality and the scope of the services, but not increasing the wages of the employees; implementation of short-term strategies and loss of a long-lasting vision for development;
- Spoiling of the environment with view of immediate profits, unregulated construction work, unsystematic development without consideration of the future; marginalization of the concept of sustainable tourism;
- High incorporation of elements of other cultures and traditions, resulting in alteration of the specific characteristics of the cultural calendar of the three cities; loss of recognizability among the citizens of Sofia, Montana and Nis , disruption of the dynamics of the communal life;
- Deteriorated international image of the three cities as a tourism destination -individually and/ or collectively as a region with similar characteristics and shared tourism products; negative associations and decreased rates of interest, respectively reduced tourism flow.

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Part V – Annexes

Annex 1: The role of tourism in a global context as an economic and social phenomenon

Definition, historical background and relevance to the present:

The World Tourism Organization defines tourism more generally, in terms which go "beyond the common perception of tourism as being limited to holiday activity only", as people "traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes".

In 1976, the Tourism Society of England's definition was: "Tourism is the temporary, short-term movement of people to destinations outside the places where they normally live and work and their activities during the stay at each destination. It includes movements for all purposes." In 1981, the International Association of Scientific Experts in Tourism defined tourism in terms of particular activities chosen and undertaken outside the home.

Tourism has become an important, even vital, source of income for many regions and even entire countries. The Manila Declaration on World Tourism of 1980 recognized its importance as "an activity essential to the life of nations because of its direct effects on the social, cultural, educational, and economic sectors of national societies and on their international relations."

Tourism brings large amounts of income into a local economy in the form of payment for goods and services needed by tourists, accounting as of 2011 for 30% of the world's trade in services, and for 6% of overall exports of goods and services. It also generates opportunities for employment in the service sector of the economy associated with tourism.

Furthermore, in a more humanitarian perspective, the act of travelling is directly connected to:



- Broadening horizons, as well as learning and developing intelligence.
- Providing a means of self-exploration, and a source of memories and experience.
- Improving sociability. Many theorists, particularly in the Age of Enlightenment, saw the benefits of travel as strengthening human society through the practice of commerce and interaction.

“Travelling through the world produces a marvellous clarity in the judgment of men... This great world is a mirror where we must see ourselves in order to know ourselves.”¹¹

Four different perspectives of tourism can be identified:

- The tourist: The tourist seeks various psychic and physical experiences and satisfactions. The nature of these will largely determine the destinations chosen and the activities enjoyed.
- The businesses providing tourist goods and service: Business people see tourism as an opportunity to make a profit by supplying the goods and services that the tourist market demands.
- The government of the host community or area: Politicians view tourism as a wealth factor in the economy of their jurisdictions. Their perspective is related to the incomes their citizens can earn from this business. Politicians also consider the foreign exchange receipts from international tourism as well as the tax receipts collected from tourist expenditures, either directly or indirectly. The government can play an important role in tourism policy, development, promotion, and implementation (see Chapter 15).
- The host community: Local people usually see tourism as a cultural and employment factor. Of importance to this group, for example, is the effect of the interaction between large numbers of international visitors and residents. This effect may be beneficial or harmful, or both.

Thus, tourism may be defined as **the processes, activities, and outcomes arising from the relationships and the interactions among tourists, tourism suppliers, host governments, host communities, and surrounding environments that are involved in the attracting and hosting of visitors.**

¹¹ Michel de Montaigne - 28 February 1533 – 13 September 1592; one of the most significant philosophers of the French Renaissance, known for popularizing the essay as a literary genre. His work is noted for its merging of casual anecdotes and autobiography with serious intellectual insight; his massive volume *Essais* contains some of the most influential essays ever written.



The service industries which benefit from tourism include transportation services (such as airlines, cruise ships, trains and taxicabs); hospitality services (such as accommodations, including hotels and resorts); and entertainment venues (such as amusement parks, restaurants, casinos, shopping malls, music venues, and theatres).

Tourism can be domestic or international, and international tourism has both incoming and outgoing implications on a country's balance of payments. Today, tourism is a major source of income for many countries, and affects the economy of both the source and host countries, in some cases being of vital importance.

In 1994, the United Nations identified three forms of tourism in its Recommendations on Tourism Statistics:

- Domestic tourism, involving residents of the given country traveling only within this country
- Inbound tourism, involving non-residents traveling in the given country
- Outbound tourism, involving residents traveling in another country

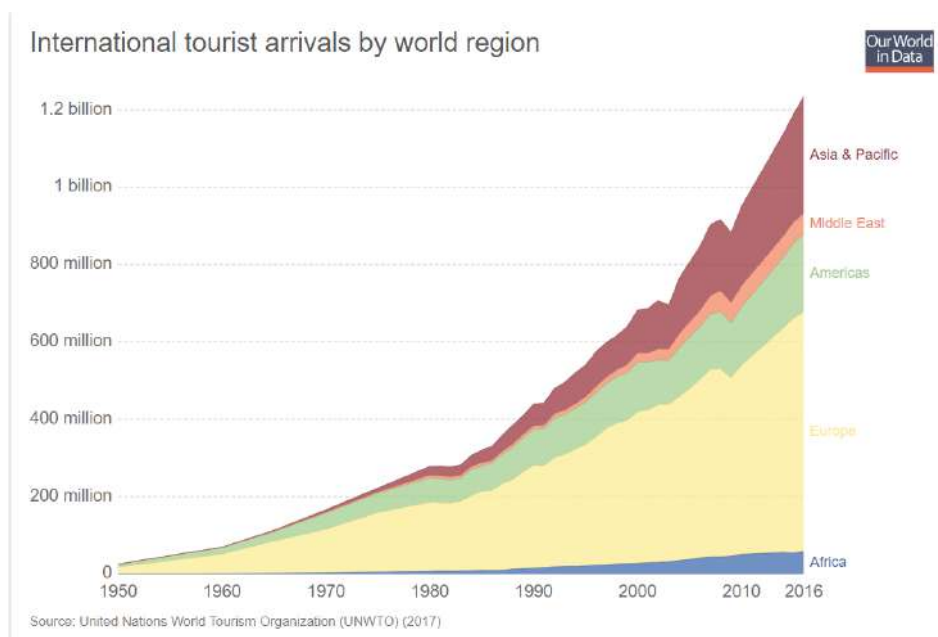
Over the decades, tourism has experienced continued growth and deepening diversification to become one of the fastest growing economic sectors in the world. Modern tourism is closely linked to development and encompasses a growing number of new destinations. These dynamics have turned tourism into a key driver for socio-economic progress.

Today, the business volume of tourism equals or even surpasses that of oil exports, food products or automobiles. Tourism has become one of the major players in international commerce, and represents at the same time one of the main income sources for many developing countries. This growth goes hand in hand with an increasing diversification and competition among destinations.

This global spread of tourism in industrialised and developed states has produced economic and employment benefits in many related sectors - from construction to agriculture or telecommunications.

The first visualisation shows how tourist arrivals have increased since shortly after the Second World War in 1950.

The United Nations World Tourism Organization (UNWTO) estimates that internationally there were just 25 million tourist arrivals in 1950. 66 years later this number has increased to 1.2 billion international arrivals per year. This is a 49-fold increase.



Tourism - key to development, prosperity and well-being

Great leaders in many fields have extolled the social benefits to humanity that result from travel. Travel is one of the noblest human occupations. In 550 B.C.E. the famous Greek statesman Solon recommended that we travel “in order to see.” To see is to increase understanding and appreciation of other peoples, other cultures, and other lands.

An ever-increasing number of destinations worldwide have opened up to, and invested in tourism, turning it into a key driver of socio-economic progress through the creation of jobs and enterprises, export revenues, and infrastructure development.

Over the past six decades, tourism has experienced continued expansion and diversification to become one of the largest and fastest-growing economic sectors in the world. Many new destinations have emerged in addition to the traditional favourites of Europe and North America.

Tourism has boasted virtually uninterrupted growth over time, despite occasional shocks, demonstrating the sector’s strength and resilience. International tourist arrivals have increased from 25 million globally in 1950 to 278 million in 1980, 674 million in 2000, and 1,235 million in 2016.

Likewise, international tourism receipts earned by destinations worldwide have surged from US\$ 2 billion in 1950 to US\$ 104 billion in 1980, US\$ 495 billion in 2000, and US\$ 1,220 billion in 2016.

Tourism is a major category of international trade in services. In addition to receipts earned in destinations, international tourism also generated US\$ 216 billion in exports through international



passenger transport services rendered to non-residents in 2016, bringing the total value of tourism exports up to US\$ 1.4 trillion, or US\$ 4 billion a day on average.

International tourism represents 7% of the world's exports in goods and services, after increasing one percentage point from 6% in 2015. Tourism has grown faster than world trade for the past five years.

As a worldwide export category, tourism ranks third after chemicals and fuels and ahead of automotive products and food. In many developing countries, tourism is the top export category

Key trends

International tourist arrivals (overnight visitors) in 2016 grew by 3.9% to reach a total of 1,235 million worldwide, an increase of 46 million over the previous year. It was the seventh consecutive year of above average growth in international tourism following the 2009 global economic crisis. A comparable sequence of uninterrupted solid growth has not been recorded since the 1960s.

Demand for international tourism followed the positive trend of previous years, with many destinations reporting sound results, while a few faced security incidents. Some redirection of tourism flows was observed, though most destinations shared in the overall growth due to stronger travel demand, increased connectivity and more affordable air transport.

By UNWTO region, Asia and the Pacific led growth in 2016 with a 9% increase in international arrivals, followed by Africa (+8%) and the Americas (+3%). The world's most visited region, Europe (+2%) showed mixed results, while available data for the Middle East (-4%) points to a decline in arrivals.

France, the United States, Spain and China continued to top the international arrivals ranking in 2016. In receipts, the US and Spain remain at the top, followed by Thailand, which climbed to number 3 last year, and China, which is fourth. France and Italy moved up in receipts to 5th and 6th position respectively, while the United Kingdom, Mexico and Thailand moved up to 6th, 8th and 9th place in arrivals.

China, the United States and the Germany led outbound tourism in their respective regions in 2016, and continue to top the expenditure ranking in that order.

Long-term outlook



- International tourist arrivals worldwide are expected to increase by 3.3% a year between 2010 and 2030 to reach 1.8 billion by 2030, according to UNWTO's long-term forecast report Tourism Towards 2030.
- Between 2010 and 2030, arrivals in emerging destinations (+4.4% a year) are expected to increase at twice the rate of those in advanced economies (+2.2% a year).
- The market share of emerging economies increased from 30% in 1980 to 45% in 2016, and is expected to reach 57% by 2030, equivalent to over 1 billion international tourist arrivals.
- Increase the number of international tourists to 1.4 billion in 2020; by 2030 to 1.8 billion;

According to World Tourism Organization (SOT) in 2012 the world's tourists have exceeded the record 1 billion, reaching 1.035 billion people and realizing stable growth of 4%. In the long run, the average annual growth rate is expected tourists in the world at the rate of 3.8% for the period up to 2020 and 2.9% average annual growth for the 2020-2030 period.

Declining growth rates in the second half of the 2010-2030 period will be due to a combination of factors, among others reaching the higher base, of which the realized growths in absolute value will continue to be high, more mature economies, which will result in a decrease in GDP growth as well as a shift from declining to rising air transport prices. Expectations are in absolute value world travel trips to reach 1.4 billion in 2020 and 1.8 billion in 2030.

Estimates for Europe are the average annual growth of attracted tourists 2.7% for the period 2010-2020 and lower growth rates to an annual average growth of 1.8% for 2020-2030. For Central and Eastern Europe expectations are for higher growth rates than the average for Europe, respectively 3.7% for 2010-2020 and 2.5% for 2020-2030. In line with these forecasts in 2020. Europe will attract 620 million tourists and will have a market share of 46% of world tourists, and in 2030, they will reach 744 million tourists market share of 41%. It is expected to reduce the market share of Central and Eastern Europe from 10.1% in 2020 to 9.7% in 2030.

Tourism in 2017: International year of sustainable tourism for development

2017 was a record year for international tourism. International tourist arrivals grew for the eighth consecutive year, a sequence of uninterrupted growth not recorded since the 1960s. Destinations worldwide welcomed 1,323 million international tourist arrivals, some 84 million more than in 2016.



“Every day, more than 3 million tourists cross international borders. Every year, almost 1.2 billion people travel abroad. Tourism has become a pillar of economies, a passport to prosperity, and a transformative force for improving millions of lives. The world can and must harness the power of tourism as we strive to carry out the 2030 Agenda for Sustainable Development.” António Guterres, United Nations Secretary-General

In December 2015, the United Nations General Assembly declared 2017 as the International Year of Sustainable Tourism for Development (IY2017). This important celebration came 50 years after the International Tourist Year on Tourism - Passport to Peace and fifteen years after the International Year of Ecotourism.

This has been a unique opportunity to devote the entirety of 2017 to activities that promote the transformational power of tourism to help us reach a better future. And one that came at a critical moment, as the global community works at regional, national and local level to contribute to achieving the 2030 Agenda for Sustainable Development and the 17 SDGs, laying out a new plan of action for people, planet and prosperity in which the three dimensions of sustainable development - economic, social and environmental - are managed in an integrated and balanced manner.

Thematic Framework of the International Year

1. Sustainable economic growth

Creating the right environment for resilient and sustainable economic growth in all parts of the world, supported by: investment in infrastructure and facilities, excellent connectivity and innovative business models that deliver quality products in line with market trends.

2. Employment, social inclusion and poverty reduction

Ensuring an equitable distribution of income and benefits from tourism, creating decent jobs, reducing poverty, providing opportunities for women and young people, respecting and supporting the interests of local and indigenous communities, and encouraging inclusive access to tourism experiences for all.

3. Resource efficiency, environmental protection and climate change

Helping the tourism sector transition to more sustainable consumption and production patterns by: creating opportunities in the green economy; mitigating and adapting to climate change; and supporting and gaining from the conservation and sustainable use of biodiversity and natural areas.

4. Cultural values, diversity and heritage

Developing supportive partnerships between tourism and cultural interests, conserving tangible and intangible heritage and cultural values, and pursuing creative opportunities to bring social,



educational and economic benefits to visitors and host communities through experiences and exchanges.

5. Mutual understanding, peace and security

Recognizing the transformative role of tourism as an agent for change, using awareness and interaction resulting from tourism to strengthen peace, understanding and reconciliation, while linking tourism development opportunities to the improvement of security in destinations and helping post-conflict areas to rebuild and expand their tourism economies.

Conclusion(s):



Tourism continues to be one of the best positioned economic sectors to drive inclusive socioeconomic growth, provide sustainable livelihoods, foster peace and understanding and help to protect our environment; tourism, if properly planned, organized, and managed, can bring understanding, appreciation, prosperity, and a better life to all who are involved.

However, the sector is facing several major challenges:

- safety and security concerns and the temptation to build new barriers to travel;
- the technological revolution;
- climate change;



- demographic changes;

Considering these global trends and challenges impacting the tourism sector and the 2030 Sustainable Development UNWTO defined the following 3 priorities

- Promoting safe and seamless travel;
- Enhancing the role of technology and innovation in tourism;
- Embracing the sustainability agenda;

Annex 2: The role of tourism as an economic and social phenomenon in the context of the European Union

- Strategic document: Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions - Europe, the world's No 1 tourist destination – a new political framework for tourism in Europe

Tourism is a major economic activity with a broadly positive impact on economic growth and employment in Europe. It is also an increasingly important aspect in the life of European citizens, more and more of whom are travelling, either for leisure or business. As an activity which impinges on cultural and natural heritage and on traditions and contemporary cultures in the European Union, tourism provides a textbook example of the need to reconcile economic growth and sustainable development, including an ethical dimension. Tourism is also an important instrument for reinforcing Europe's image in the world, projecting our values and promoting the attractions of the European model, which is the result of centuries of cultural exchanges, linguistic diversity and creativity.

This difficult background for the tourism industry has highlighted a number of challenges which the European tourism sector must face. In order to respond, it is essential that all operators in the sector combine their efforts and work within a consolidated political framework that takes account of the new EU priorities set out in the 'Europe 2020' strategy: Europe must remain the world's No 1 destination, able to capitalise on its territorial wealth and diversity.

Tourism is an economic activity capable of generating growth and employment in the EU, while contributing to development and economic and social integration, particularly of rural and mountain areas, coastal regions and islands, outlying and outermost regions or those undergoing convergence. With some 1.8 million businesses, primarily SMEs, employing approximately 5.2 % of the total workforce (approximately 9.7 million jobs, with a significant proportion of young people), the



European tourism industry generates over 5 % of EU GDP, a figure which is steadily rising. Tourism therefore represents the third largest socioeconomic activity in the EU after the trade and distribution and construction sectors. Taking into account the sectors linked to it, tourism's contribution to GDP is even greater; it is estimated to generate over 10 % of the European Union's GDP and provide approximately 12 % of all jobs. In this regard, observing the trend over the last ten years, growth in employment in the tourism sector has almost always been more pronounced than in the rest of the economy.

❖ **Competences, defined by the Lisbon Treaty**

The European Commission, in cooperation with the Member States and associations representing the sector, has invested considerable effort over a number of years in implementing a series of actions intended to strengthen European tourism and its competitiveness. At the same time, the Commission has also set up an integrated and highly developed system to protect passengers and consumers, including those with disabilities or reduced mobility, on all means of transport.

Over the years, the European Union has been able to lay the foundations for a European tourism policy, stressing those factors which determine its competitiveness while taking account of the need for sustainable development. With the entry into force of the Lisbon Treaty, the importance of tourism is recognised; the European Union now has powers in this field to support, coordinate and complement action by the Member States. It is a step forward which provides the necessary clarification and enables the setting up of a coherent framework for action.

As laid down by Article 195 of the TFEU, the European Union can therefore:

- promote the competitiveness of undertakings in this sector and create an environment conducive to their development;
- encourage cooperation between the Member States, particularly through the exchange of good practice;
- develop an integrated approach to tourism, ensuring that the sector is taken into account in its other policies.

❖ **Challenges with regard to the tourism development in the European Union**

A number of factors are today affecting the development of tourism activity in Europe. As with every other sector, the tourism industry is facing increasing global competition, with emerging or



developing countries attracting increasing numbers of tourists. Faced with this competition, Europe must offer sustainable and high-quality tourism, playing on its comparative advantages, in particular the diversity of its countryside and extraordinary cultural wealth. It must also strengthen cooperation with those countries whose population can provide a source of visitors to European destinations as their standard of living increases.

Another significant challenge relates to the demographic trends observed in Europe and the new tourist behaviour or expectations which result. These changes require the industry to adapt quickly in order to retain its level of competitiveness. In particular, the number of persons aged over 65 is expected to reach 20 % of the population in 2020. This population group, consisting of individuals with both purchasing power and leisure time, represents significant market potential but also requires changes in the sector to meet its particular needs. The same applies to accommodating the increasing number of tourists with reduced mobility (recently estimated at 127 million persons), who have specific needs and must be integrated into the tourist supply and service structure.

Other structural challenges must be fully integrated into tourism policy. Thus the supply of tourism services must in future take into account constraints linked to climate change, the scarcity of water resources, pressure on biodiversity and the risks to the cultural heritage posed by mass tourism. Tourism businesses need to reduce their use of drinking water where there is a risk of drought, and reduce their greenhouse gas emissions and environmental footprint.

In the coming years, climate change in Europe could determine a restructuring of travel models and affect certain destinations. Moreover, declining snow cover in Europe's mountainous regions could cause a fall in winter tourism. At the same time, rising sea levels could bring changes for tourism in coastal areas. European and national tourism policies will need to take account of all these structural changes, both by taking measures to relieve structural unemployment and by ensuring effective distribution of tourism-related investment.

The development of information and communication technologies (ICT) and their increasing use by consumers has also radically changed the relationship between the tourism industry and its customer base. An assessment of the level of awareness, accessibility and use of these services by the various operators concerned has shown that they use ICT in different ways by virtue of factors such as their basic skills, their size and their relative position in the tourist chain.

In the light of all these challenges and opportunities, businesses in the sector, particularly SMEs, are not always in a position to adapt rapidly, given their limited financial resources and their employees' lack of qualifications.

Finally, there are also specific challenges determined by the particular characteristics of the European tourism sector. These are linked on the one hand to consumer models, particularly



seasonal distribution and tourist movements, and on the other to production models, i.e. the value chain and tourist destinations. Tourist demand is currently concentrated very strongly on the months of July and August. This seasonal aspect not only affects revenue flows, but results in non-optimum use of existing infrastructure and staff.

❖ Objectives addressing the presented challenges:

In the face of the crisis and the increasing constraints on its activity, European tourism must evolve. This requires changes at all levels. The European Union must contribute to this and encourage a voluntary policy to speed up growth and create the conditions for making tourism more attractive.

In line with the Lisbon Treaty, the main aim of European tourism policy is to stimulate competitiveness in the sector, while being aware that in the long term, competitiveness is closely linked to the 'sustainable' way in which it is developed. This aim is clearly linked to the Union's new 'Europe 2020' economic strategy, and in particular the flagship initiative 'An industrial policy for the globalisation era'. Moreover, tourism can also contribute to other flagship initiatives, particularly 'Innovation Union', 'A Digital Agenda for Europe' and 'An Agenda for new skills and jobs'. In addition, the development of a more active tourism policy, based in particular on fully exercising the freedoms guaranteed by the Treaties, could make a significant contribution to relaunching the internal market.

The European action framework aims first of all to encourage the prosperity of tourism in Europe. But it must also respond to concerns relating to social matters, territorial cohesion and the protection of and capitalisation on natural and cultural heritage. Moreover, it will need to enable the sector to become more resilient to the impact of climate change and more able to mitigate the effects of the possible structural changes caused by tourism. Indirectly, tourism also helps to strengthen the feeling of European citizenship by encouraging contacts and exchanges between citizens, regardless of differences in language, culture or traditions. It is also important in this context that European citizens are aware of their rights and can take advantage of them when moving within or outside the European Union; they must be able to exercise their rights as European citizens as easily as within their own country. The Commission will propose solutions for minimising the obstacles encountered by European citizens when they try to obtain tourism services outside their own country.

These requirements for an ambitious European policy were recognised at the informal meeting of ministers for tourism organised on the initiative of the Spanish Presidency of the Council on 15 April 2010. Following the high-level conference on European tourism held in Madrid on 14 April 2010, which served as a 'summit' for the sector, this informal ministerial meeting represented a decisive step towards committing the Union and all the Member States to a competitive, sustainable, modern



and socially responsible tourism sector. Thus the EU ministers for tourism supported the 'Madrid Declaration', which establishes a series of recommendations concerning the implementation of a consolidated European tourism policy, stresses the need to strengthen sustainable competitiveness in the sector and recognises the added value of action by the EU on tourism, providing a worthwhile complement to action by the Member States through an integrated approach to tourism.

To achieve these objectives, actions promoting tourism may be grouped under the following four priorities:

1. Stimulate competitiveness in the European tourism sector;
2. Promote the development of sustainable, responsible and high-quality tourism;
3. Consolidate the image and profile of Europe as a collection of sustainable and high-quality destinations;
4. Maximise the potential of EU financial policies and instruments for developing tourism.

These four priorities provide the skeleton for a new action framework for tourism which the Commission intends to implement in close cooperation with the Member States and the principal operators in the tourism industry.

❖ **Conclusions derived:**

European tourism policy needs a new impetus. Faced with challenges which require concrete responses and efforts to adapt, operators in the European tourism industry need to be able to combine their efforts and work within a consolidated political framework which takes the EU's new priorities into consideration. Taking account of the European Union's new competences in the field of tourism, this communication defines an ambitious framework for making European tourism a competitive, modern, sustainable and responsible industry. The Commission envisages a number of specific initiatives to give the European tourism sector the means to adapt and develop. These actions complement the policies of the Member States and aim to coordinate efforts by determining measures which provide a real European added value. The success of this strategy will depend on the commitment of all stakeholders and on their capacity to work together to implement it.

In the future, the Commission will continue its efforts to have regular, rapid and transparent exchanges of views with the Member States and the tourism industry on initiatives relating to tourism. In order to do this, it will rely in particular on the advisory committee on tourism. Public administrations will also be in a position to inform the various national and regional stakeholders of Commission initiatives on a regular basis.



- Key facts and figures:
 - International arrivals to the European Union recorded a solid growth in 2016 (above 4%, exceeding the world's average), increasing by 21 million. As a result, total arrivals to the EU-28 have reached almost 500 million, accounting for 40% of the world's total. 2016 was the 7th consecutive year of sustained growth for the EU-28 following the 2009 global economic and financial crisis, with 107 million more tourists than the pre-crisis level of 2008.
 - The eight European Union destinations in Southern and Mediterranean Europe, the most visited group of countries within the Union, led growth at 8% with solid performance in most destinations. Portugal (+13% through November), Spain (+10%) and Croatia (+9% through November) led the group's results, fuelled by strong demand from European source markets, partly due to the perceived security and stability in these countries in comparison to destinations elsewhere. Spain, the world's third most visited destination after France and the United States, and Europe's second, welcomed 6 million more tourists in 2016, up to a total of 75 million. Island destinations Cyprus (+20% through November) and Malta (+9% through November) reported double-digit growth, driven by improved air connectivity and higher perceived safety in comparison with some competing destinations. Slovenia (+12% through November) also reported solid results. Greece (+5% through October) also experienced a solid growth in arrivals, after recovering from a decrease in the first half of the year as a result of the refugee and migrant crisis. Italy, Europe's third largest destination reported 4% more arrivals through October, after similar growth last year.
 - The nine European Union destinations in Central and Eastern Europe recorded an overall growth rate of 7%, with over 4 million more arrivals and reaching 71 million. Slovakia (+18% through October) and Bulgaria (+14% through November) led growth. Lithuania and Romania (+11% through September and November, respectively) also reported double-digit growth rates. Hungary (+7% through Q3), the Czech Republic and Latvia (both +6% through October) as well as Estonia (+6% through September) also turned in good results. Growth in Poland (+2% through Q2) was more modest.
 - Most of the five European Union destinations in Northern Europe (+5%) turned in robust results. Ireland (+11% through November) recorded double-digit growth, supported by increased air connectivity. Solid results were also recorded by Sweden and Denmark with 7% and 6% more arrivals through October and November, respectively, as well as by Finland (+4% through October).



- The six European Union destinations in Western Europe, managed to overcome the hardship of events in its largest destination France (-5% through September) and Belgium (-14% through September) recording an overall flat growth in arrivals (0%). Germany posted 1% growth through October, with considerable business travel, but weaker leisure travel due to bad weather conditions in the summer season and various terrorist attacks. Growth in this group was led by the Netherlands (+5% through September), partly thanks to various cultural blockbuster exhibitions in the country and a steady growth in arrivals from China and other emerging markets. Austria also reported 5% more arrivals through November, with particularly strong city tourism favoured by a perception of security in the destination, stable weather conditions and strong investments.

General conclusion(s):

The economic importance of tourism Tourism plays a major role in the EU economy. According to the European Commission, it is the third largest socio-economic activity in the EU (after the trade and distribution, and construction sectors), and has an overall positive impact on economic growth and employment. Tourism also contributes to the development of European regions and, if sustainable, helps to preserve and enhance cultural and natural heritage.

Annex 3: Tourism governance and funding in the Republic of Bulgaria

The Council of Ministers is responsible for formulating national tourism policy in Bulgaria. The Ministry of Tourism implements this policy and co-ordinates the relevant activities of other ministries and institutions. The Ministry of Tourism is also responsible for regulation, product development, marketing, research and information, management of external funding for projects and assistance to regional management organisations.



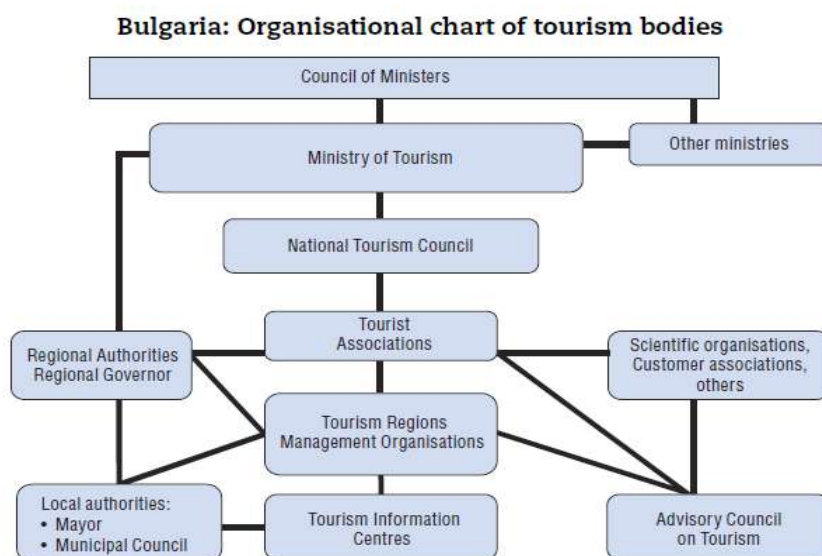
The National Tourism Council is a government consultative body under the authority of the Ministry of Tourism. Its members include representatives of tourism-related ministries and national, regional and local tourism associations, transport operators and consumer bodies.

At regional level, the regional authorities develop and implement tourism strategies and programmes in line with the national tourism and regional development strategies. Destination Management Organisations carry out product development and marketing. These are legal bodies established and registered under the Tourism Act, members of which include tourism associations, regional and municipal administrations, institutes, museums, scientific bodies and tourism schools.

The Tourism Act also makes provision for local authorities to adopt tourism development programmes according to local resources and needs. The local mayor is in charge of establishing an Advisory Council on Tourism and a Municipal Expert Commission to categorise tourism facilities and supporting initiatives in line with national tourism policies.

The Mayor has almost the same duties as the Minister of Tourism at local level. He is in charge of:

- Elaborating the tourism development programme on the territory of the municipality;
- Establishing and managing the Advisory Council on Tourism and the Municipal Expert Commission for Categorization of Tourism Facilities;
- participating in programs and projects in the field of tourism funded by the European Union and by international organizations;
- Supporting initiatives of the national authorities, the organization managing the tourism region and the tourism associations on the territory of the municipality, thus implementing the national tourism policy;
- Creating an annual report on the spending of the tourism tax collected by the municipality.



Source: OECD, adapted from the Ministry of Tourism, 2016.

The efforts of the Ministry of Tourism in Bulgaria are focussed on several priority areas:

- Improvement of the quality of the national tourism product and tourist services and increased consumer protection;
- Promotion of sustainable tourism development;
- Diversification of the national tourism product and reduction of regional disparities by

creating strong regional brands of specialised types of tourism and

- Positioning Bulgaria as a well-known and preferred year-round destination with an

easily recognisable national identity, preserved culture and nature and a leading tourist

location in Central and Eastern Europe;

Action to overcome regional disparities and strengthen performance at a regional level

includes measures to: (i)strengthen the Destination Management Organisations; (ii)consolidate



the establishment and functioning of a network of tourism information centres; (iii) create conditions for public-private partnership; (iiii) regulate the status and management of national resorts.

- Work is ongoing to **strengthen the business environment** by providing assistance to investors to modernise facilities and improving the quality of human resources. Legislative changes are being made to address issues related to the quality of the tourism product and employment in the sector, while also seeking to diminish administrative burdens on business.

- Action to **strengthen Bulgaria’s appeal as a year-round destination** focuses on the development of specialised forms of tourism. This includes the use of European Structural Funds and strengthening marketing in target markets. Trans-national tourism products are also being developed.

- Action on **sustainable development** includes adaptation of products to climate change, improving energy efficiency and waste management, protecting landscapes and biodiversity, and strengthening regulations to combat excessive development in seaside and mountain resorts.

Annex 4: Existing legislation on tourism development in the Republic of Bulgaria



Bulgarian Tourism Act regulates public relations with respect to the achievement of sustainable tourism development aiming at:

- providing conditions for sustainable development of tourism and for a competitive national tourist product;
- creating conditions for the development of specialized types of tourism;
- introducing unified criteria for the performance of tourist activities and the provision of tourist services;
- providing protection for tourist services' users.

Bulgarian Tourism Act regulates a number of different activities such as certification of spas and medical, wellness and thalassotherapy centres; Regulation of tourism-related professions such as tour guides, mountain guides and ski instructors; Role and activities of Tourist Information Centres; and Setting detailed rules for organised school trips.

In 2017 the Ministry of Tourism has drafted amendments in the legislation with regard to the Directive (EU) 2015/2302 of the European Parliament and of the Council of 25 November 2015 on package travel and linked travel arrangements.

The development and protection of the Bulgarian Black Sea Coast is a subject of a special law - the Law on the Structure of the Black Sea Coast.

Other laws, such as those relating to taxation, and concessions affect tourism but come under the control of other Ministries.

Annex 5: Integrated transport strategy for the period up to 2030 (Bulgaria)

The Integrated Transport Strategy for the period up to 2030 was approved by Decision No. 336 / 23.06.2017 of the Council of Ministers. The Strategy outlines the main directions for the development of the national transport system in the period up to 2030.

The integrated transport strategy for the period up to 2030 is designed in accordance with the



principles of consistency, continuity and synergy with national and European strategy papers.

The existence of such a document is a precondition for the fulfillment of the Preliminary Conditions of the European Commission for the European Structure and Investment Funds for the period 2014-2020 in the Transport sector and is in accordance with the Partnership Agreement of the Republic of Bulgaria.

The document defines three strategic objectives, which cover 9 strategic priorities, each of which contains a framework of specific objectives (tasks). On this basis, measures have been identified that are best suited to achieving the respective objectives.

The strategic objectives of transport policy by 2030 are:

- ❖ Improving the efficiency and competitiveness of the transport sector*
- ❖ Improving transport connectivity and accessibility (internal and external)*
- ❖ Limit the negative effects of the development of the transport sector.*

The strategic priorities in the development of transport are:

- ❖ Efficient maintenance, modernization and development of transport infrastructure*
- ❖ Improving the management of the transport system*
- ❖ Development of intermodal transport*
- ❖ Improving the conditions for applying the principles of liberalization of the transport market*
- ❖ Reducing fuel consumption and increasing energy efficiency of transport*
- ❖ Improving the connectivity of the Bulgarian transport system with the single European transport area*
- ❖ Ensuring quality and affordable transport in all regions of the country*
- ❖ Limiting the negative impact of transport on the environment and human health*
- ❖ Increasing the security and safety of the transport system.*

A national transport model developed for passenger and freight transport is also included in the scope of the strategy document and is applicable to individual modes of transport within the country, international and transit.



Annex 6: Accessible tourism in the city of Sofia

Analysis of Vision for Sofia indicates that new projects are being launched every year in the city to restore areas for recreation, reconstruction and rehabilitation of pedestrian alleys, pavements and bicycles, sports grounds and technical facilities for people with disabilities. After 2011, work is being done to ensure accessibility to the subway. In all 34 metro stations, elevators have been constructed, with a newly built 27 stations with at least two entrances with lifts.

According to data from "Urban Mobility Center" EAD, 550 of the 770 vehicles serving the public transport lines are low-level transport vehicles. In addition, 1053 electronic information boards with voice announcement were installed on the territory of Sofia Municipality. Measures have also been taken with regard to accessibility to sites and buildings that are municipal property. An accessible environment is provided for up to 6 stadiums and 11 halls included in the list of municipal sports facilities, as well as up to 3 cultural centers - Krasno Selo, Nadezhda and Sredets; the Sofia City Art Gallery, the Monument of the Unknown Soldier and the Central Mineral Bath.

Of the 176 municipal schools 18 are equipped with a comprehensive, accessible environment, which includes a ramp, elevator and an adapted bathroom. 12 hospitals and specialized hospitals are available for long-term treatment and rehabilitation. In 17 social care facilities for children and adults, a fully accessible environment is provided, and in 7 - part. These are some of the examples demonstrating progress in providing an accessible environment, which to date covers over 240 municipal property buildings.

The most important step towards creating a fully accessible city environment is the **Strategy for an Accessible Urban Environment**, adopted by the CSS in 2017, according to which an Act 16 will not be issued for buildings that have not built accessibility facilities for people with disabilities. This strategy applies to all buildings in Sofia. Further measures are needed to ensure the accessible urban environment, for example, for blind people and all other groups that need specific infrastructure to carry out their day-to-day activities peacefully and independently.

MEASURES



- Approval by Decision of the Council of Ministers of the Republic of Bulgaria of Concept of changes in national legislation related to the application of Art. 9 Accessibility of the United Nations Convention on the Rights of the Child people with disabilities, in terms of accessibility of the architectural environment.
- Implementation of the established with the approved Concept under Art. 9 with respect to the accessibility of the architectural environment legislative and normative changes shall be made by the competent departments of the respective bodies normative acts with established need for changes.
- Harmonization of national legislation with effect requirements for accessibility of European regulations, directives and standards.
- Increasing accessibility to information and opportunities for expression of opinion.
- Embracing and facilitating the use of sign language, Braille alphabet, complementary and alternative means of communication.
- Recognizing and helping to use the language of gestures.
- Providing adapted rail, sea and air transport.
- Providing special conditions for driving, stopping and parking motor vehicles driven or used by disabled persons.
- Extending the reach of accessible public transport to people with durable disabilities.
- Extended door-to-door transport system for heavy-duty people and multiple injuries.
- National media service providers Bulgarian National TV and the Bulgarian National Radio should guarantee in the services your full exercise of all rights of disabled without discrimination on the basis of disability, by providing information in different programming areas in accessible formats for them and through technologies suitable for various types of disabilities - inclusion of specialized subtitles, character language, audio description, audio subtitles, accessible multimedia, as well as other written, sound, in a simplified language, narrative, complementary and alternative means of communication.



Annex 7: Cultural tourism in the city of Sofia: sites

✓ **Alexander Nevsky Cathedral**

The gold-domed Alexander Nevsky Cathedral was built in the early 20th century in memory of the 200,000 Russian, Ukrainian, Belorussian and Bulgarian soldiers, who died in the Russo-Turkish War, 1877–1878. It is one of the largest Eastern Orthodox cathedrals in the world. The cathedral's gold-plated dome is 45 m high, with the bell tower reaching 50.52 m.

Built in Neo-Byzantine style, it serves as the cathedral church of the Patriarch of Bulgaria and is one of the largest Eastern Orthodox cathedrals in the world, as well as one of Sofia's symbols and primary tourist attractions. The St. Alexander Nevsky Cathedral in Sofia occupies an area of 3,170 square metres (34,100 sq ft) and can hold 10,000 people inside. It is the second biggest cathedral located on the Balkan Peninsula after the Cathedral of Saint Sava in Belgrade.

The cathedral is adjacent to St. Sofia Church, the church for which the city of Sofia is named. Other notable landmarks in the immediate vicinity of the cathedral are the Monument to the Unknown Soldier, the Bulgarian Academy of Sciences, the National Gallery of Foreign Art, the Bulgarian parliament and a park honoring Ivan Vazov, where one can buy handmade textiles, icons, and antiques in a small flea market.

✓ **Sofia University “St. Kliment Ohridski”**

The Sofia University St. Kliment Ohridski is the first higher educational institution in Bulgaria. Its history is an embodiment and a continuation of centuries of cultural and educational tradition in this country.

Public teaching activities in Bulgaria date back to the second half of the 9th century. During the Bulgarian Renaissance, a new idea for opening a School of Higher Education was conceived. The prestige of the School of Higher Education grew rapidly with the cultural and educational mission it acquired after the Liberation in 1878.

Founded on 1 October 1888, the edifice of the university was constructed between 1924 and 1934 with the financial support of the brothers Evlogi Georgiev and Hristo Georgiev (whose sculptures are now featured on its façade) and has an area of 18,624 m² and a total of 324 premises. The university has 16 faculties and three departments, where over 21,000 students receive their education. The current rector is Anastas Gerdzhikov. It has been consistently ranked as the top university in Bulgaria



according to national and international rankings—it is constantly among the best four percent of world universities according to QS World University Rankings.

Year by year the Sofia University has developed into an important academic and scientific centre on the Balkans, a well developed academic institution with European dimensions. Today Sofia University St. Kliment Ohridski is the largest and most prestigious educational and scientific centre in the country.

Its main building is situated at 15 Tsar Osoboditel Blvd. The Faculties of Mathematics and Informatics, Physics, Chemistry, Biology, Journalism and Mass Communication, Theology, Economics and Business Administration, and Preschool and Primary School Education are spread over several campuses around Sofia.

✓ **National History Museum (Bulgaria)**

Founded in 1973, the National Museum of History in Sofia contains more than 650,000 exhibits and is one of the largest history museums on the Balkans. The aim of the museum is to provide a comprehensive view on Bulgarian history from the prehistory to present, in as broad an European context as possible.

The National Museum of History was established on 5 May 1973 by Decree No. 90 of the Council of Ministers. On 2 March 1984, the new representative exhibition was opened in the building of the Court of Justice on the occasion of the 1300-th anniversary of the Bulgarian state.

The National Museum of History in Sofia is one of the largest history museums on the Balkans with 650.000 items and the largest archaeological and historical archive. The Museum's collections are its greatest treasure. They comprise materials from Prehistoric ages till our days.

✓ **Ivan Vazov National Theater**

The “Ivan Vazov” National Theatre is Bulgaria's biggest, as well as the oldest theatre in the country; it is one of the major landmarks in Sofia due to its prime location and grandiose architecture.



The National theatre is located in the centre of Sofia and its edifice faces the City Garden. The Ivan Vazov National Theatre has a well-equipped main stage with 750 seats, a smaller 120-seat stage and an additional 70-seat one on the fourth floor. The theatre employs some of the country's best actors and stage directors, many of whom are widely popular.

Founded in 1904 by the artists from the "Salza i Smyah" theatre, initially, it was called simply the National Theatre, but soon after it was named after the prominent Bulgarian writer Ivan Vazov. The theatre's Neoclassical building, designed by famous Viennese theatre architects Hermann Helmer and Ferdinand Fellner, was finished in 1906 and opened in 1907. A theatrical school was established as part of the National Theatre in 1925.

A fire in 1923 and the bombings in the World War II seriously damaged the building, so the theater had a few reconstructions during the time. The number of seats in the main hall was increased, the scene was more spacious and modern equipment was provided. Virtually the original appearance of the theater was preserved, however, changes were made in the volume, interior and facade.

✓ **National Gallery for Foreign Art**

The National Gallery for Foreign Art of Bulgaria was a gallery located on St. Alexander Nevsky Square in Sofia. It served as the country's national institution for non-Bulgarian art. It was situated in the 19th-century Neoclassic edifice of the former Royal Printing Office.

The gallery's permanent exposition features European, Asian (Buddhist, Japanese and Indian) and African art, as well as separate contemporary art and engraving sections. Some of the works are in restoration, while others are in stock but not displayed due to the lack of space.

- **Indian Art**

Halls One, Two and Three hold exhibitions of Indian art. Hall One is centered on Indian miniature. The collection includes works with traditional motives, paintings from the Mogol era and the Delhi Sultanate and the art schools of Rajasthan and Pahara. Hall Two contains religious sculptures from 320-550 AD. The figures represent Hindu gods like Vishnu, Ganesha, Brahma, Shiva and Krishna. Hall Three holds an exhibition of very rare 16th century sculptures of Christian saints from Goa, influenced by Indian tradition.

- **Japanese art**

Hall Four holds a collection of various Japanese ukiyo-e prints, dating from the 18th century. It is the main artistic genre of woodblock printing in Japan. Usually the word ukiyo is literally translated as "floating world" in English, referring to a conception of an evanescent world, impermanent, fleeting beauty and a realm of entertainments (kabuki, courtesans, geisha) divorced from the responsibilities of the mundane, everyday world; "pictures of the floating world", i.e. ukiyo-e, are considered a genre unto themselves. The collection offers an insight into the development of ukiyo-e from monochrome



to polychrome prints, as well as the first contacts of Japanese and European art. Some of the artists included are Hokusai, Hiroshige, Kikukawa Eizan and Utamaro.

- African art

The African art collection in Hall Five is composed mainly of sculptures with a religious cult function. Masks are also present. Many of the items belong to local cultures of Benin and Ghana, and some Dogon statues and masks are also presented.

- Buddhist art from Southeast Asia

Hall Six exhibits Buddhist art from the region of Southeast Asia, primarily from the Pagan Kingdom and other areas of what is today Myanmar. Sculptures of the Buddha in the different positions and from various materials, as well as manuscripts and other fine and applied arts, date as early as the 11th century AD. This collection was donated to the Gallery in 1987.

- European fine arts

Halls Seven, Eight and Nine display a rich collection of European fine arts from the 15th to the 20th century. Hall Seven is concentrated mostly around Renaissance art, along with smaller collections of Dutch Golden Age painting. The oldest work in the exhibition, The Baptism of Christ by Andrea del Verrocchio, dates from the late 15th century. Other Italian artists include Pietro Perugino, Antonio da Correggio, Rosso Fiorentino, Giovanni Battista Moroni and Alessandro Magnasco. Dutch painting is represented by Jan van Goyen, Nicolaes Pieterszoon Berchem, Isaac van Ostade and Frans Francken II. Hall Eight encompasses French, Flemish and other art from the 18th to the first half of the 19th century, most notably works by Jean-Baptiste Greuze, Francisco Goya and Jan Frans van Bredael. Hall Nine exhibits painting and sculpture from the second half of the 19th and the 20th century by Auguste Rodin, Ivan Meštrović, Pierre-Auguste Renoir, Marc Chagall, Pablo Picasso, Joan Miró and Salvador Dalí, among others. Hall Ten holds a rare display of paintings by Les Nabis, a group of Post-Impressionist avant-garde artists who set the pace for fine arts and graphic arts in France in the 1890s.

- Other

Halls 11 to 19 hold various expositions, including a Salon d'Automne (Hall 18), a collection of Parisian-themed and authored works of the early 20th century, modern Spanish art, a display dedicated to Nicholas Roerich, as well as the Nova Hall where temporary exhibitions are held.

✓ **St. St. Cyril and Methodius National Library**



The St. St. Cyril and Methodius National Library is the National Library of Republic of Bulgaria. It is the biggest greatest library in the country and the oldest cultural institute after the Liberation of Bulgaria.

The National Library was built in neoclassical style and the monument of the holy brothers St. St. Cyril and Methodius is an inseparable part of it. The National Library gathers, processes, organizes, preserves and provides to Bulgarians and foreigners printed and other type of publications that were published in the country.

- **Earth and Man National Museum**

The Earth and Man National Museum is one of the biggest mineralogical museums in the world. It was found on December 30th 1985 and welcomed its first visitors in June 19th 1987.

The museum is situated in a reconstructed and adapted historic building with an area of 4,000 m² constructed in the end of the 19th century (1896–1898). It has a number of exhibition halls, stock premises, laboratories, a video room and a conference room. Its collection covers 40% of all known naturally occurring minerals as well as man-made ceramics prepared by Bulgarian scientists. There are over 20 000 items. They have been organized in groups like giant crystals, the minerals in Bulgaria, precious stones. Other collections present the industrial use of minerals and Bulgaria's natural resources.

Apart from its permanent expositions related to mineral diversity, the museum also often hosts various exhibitions, concerts and events like seminars, conferences and fairs. The Earth and Man National Museum hosts cultural and nature preservation events. Earth and Man National Museum is situated on Sofia's 4 Cherni Vrah Blvd. It works each day apart from Sunday and Monday from 10 am to 6 pm. Tickets cost two leva and discounts are available for students and group visits. Explanations in foreign languages are provided, if necessary.



Annex 8: Questionnaire, elaborated for the better estimation of the tourism condition in the cities of Nis, Montana and Sofia

QUESTIONNAIRE

CURRENT CONDITION:

GENERAL DATA:



1. Existing accommodations (number) over the last five years:

2017	2016	2015	2014	2013

2. Bed base of the existing accommodations (number) over the last five years:

2017	2016	2015	2014	2013

3. Nights spent in the existing accommodations (number) over the last five years:

2017	2016	2015	2014	2013

4. People spent the night in the existing accommodations (number) over the last five years:

2017	2016	2015	2014	2013

5. Incomes from the nights spent in the existing accommodations (number) over the last five years:

2017	2016	2015	2014	2013

6. How would you rate the performance of tourism in your area compared to other (neighboring) areas?

rather successful

rather weak

other (please specify)



7. In your opinion, what are the main advantages of tourism companies and organizations in your area?

.....
.....
.....
.....

8. In your opinion, what are the main disadvantages of tourism in your area?

.....
.....
.....
.....

(deficiencies related to travel companies, including accommodation, transport and infrastructure, advertising, etc. may be mentioned)

9. In your opinion, what are the main problems of the tourist companies and organizations in your area?

.....
.....
.....
.....

10. In your opinion, what are the main threats to the development of tourism in your area?

.....
.....
.....
.....



11. In your opinion, what type of tourism is the most developed, at the moment, in your area?

- cultural and historical tourism
- rural tourism
- festival tourism
- congress / event tourism
- folklore tourism
- religious tourism
- eco tourism
- hobby tourism - trips, photography, culinary
- SPA tourism
- wine tourism
- other type: (please specify)

(more than one answer may be given)

12. Can you indicate (regardless of the answer to the previous question) what are the reasons for the trips of your visitors?

- rest
- healing trips
- entertainment
- alternative tourism
- business trips
- other (please specify)

(more than one answer may be given)

13. How do the tourism in the region develop according to your observations?

- rather positive
- rather negative



- no tangible change
- other (please specify)

14. To date, is there an adequate and reliable source for finding tourist information about the region (municipality, district)?

- YES
- NO

15. If the answer to the previous question is positive, please indicate this source:

- municipal office
- state institution
- private initiative
- other (please specify)

(more than one answer may be given)

16. Do you have a document containing statistics on the current state (covering the last five years or a shorter period (please specify)) of the different types of tourism available in your territory?

.....

.....

.....

.....

17. If the answer to the foregoing question is "yes" and a similar document is described, please specify whether this document is available and in what form?

- Yes, but with limited (official) access
- Yes, it is accessible to the general public:
- on paper



on an electronic medium

on-line

18. Do you have a strategic document (at the municipal level) on the development of the different types of tourism available in your territory and if yes, what time period is it for?

.....
.....
.....
.....

19. If the answer to the foregoing question is "yes" and a similar document is described, please specify whether this document is available and in what form

Yes, but with limited (official) access

Yes, it is accessible to the general public:

on paper

on an electronic medium

on-line

20. What type of advertising to promote regional attractions is currently being used (within the last five years)?

television and radio advertising

publications in specialized websites and electronic media

Internet

advertising in specialized tourist publications

information and signboards

Billboards

others: (please specify)



(more than one answer may be given)

21. Have you participated in national tourism events (exhibitions, conferences, etc. within the last five years) to promote your region?

.....
.....
.....
.....

21. Have you participated in international events (outside the country) in the field of tourism (exhibitions, conferences, etc. within the last five years) in order to promote your region?

.....
.....
.....
.....

SPELEOLOGY TOURISM

1. What proportion of tourism revenue has been formed by this type of tourism over the past five years?

2017	2016	2015	2014	2013

(indicate in percentages)

2. Specify the main sites of this type of tourism located in your area:

.....
.....
.....



3. Specify the number of persons who have visited at least five of the listed primary sites over the past five years

<i>Name of the site</i>					
<i>Number of visitors</i>	<i>2017</i>	<i>2016</i>	<i>2015</i>	<i>2014</i>	<i>2013</i>
1.					
2.					
3.					
4.					
5.					

(you can describe additional sites as well)

4. Indicate the months of active activity of at least five of the following major objects:

	<i>Period of activity</i>	
<i>site</i>	<i>yearly</i>	<i>Specific months</i>
1.		
2.		
3.		
4.		
5.		



ADVENTUROUS TOURISM

1. What proportion of tourism revenue has been formed by this type of tourism over the past five years?

2017	2016	2015	2014	2013

(indicate in percentages)

2. Specify the main sites of this type of tourism located in your area:

.....

.....

.....

3. Specify the number of persons who have visited at least five of the listed primary sites over the past five years

<i>Name of the site</i>	2017	2016	2015	2014	2013
<i>Number of visitors</i>					
1.					
2.					
3.					
4.					
5.					

(you can describe additional sites as well)



4. Indicate the months of active activity of at least five of the following major objects:

site	Period of activity	
	yearly	Specific months
1.		
2.		
3.		
4.		
5.		

CULTURAL TOURISM

1. What proportion of tourism revenue has been formed by this type of tourism over the past five years?

2017	2016	2015	2014	2013

(indicate in percentages)

2. Specify the main sites of this type of tourism located in your area:

.....

.....

.....



3. Specify the number of persons who have visited at least five of the listed primary sites over the past five years

<i>Name of the site</i>					
<i>Number of visitors</i>	<i>2017</i>	<i>2016</i>	<i>2015</i>	<i>2014</i>	<i>2013</i>
1.					
2.					
3.					
4.					
5.					

(you can describe additional sites as well)

4. Indicate the months of active activity of at least five of the following major objects:

	<i>Period of activity</i>	
<i>site</i>	<i>yearly</i>	<i>Specific months</i>
1.		
2.		
3.		
4.		
5.		



POTENTIAL FOR DEVELOPMENT

GENERAL QUESTIONS

1. According to you, the development of what kind of tourism is best suited to the needs of your area?

- cultural and historical tourism
- festival tourism
- rural tourism
- religious tourism
- eco tourism
- folklore tourism
- SPA tourism
- hobby tourism - trips, photography, culinary
- congress / event tourism
- wine tourism
- other type: (please specify)

(more than one answer may be given)

2. What do you think is the most effective advertising method to promote regional attractions?

- television and radio advertising
- publications in specialized websites and electronic media
- Internet
- advertising in specialized tourist publications
- information and signboards
- Billboards
- others: (please specify)

(more than one answer may be given)

3. What do you relate to the development of tourism in your area?

.....



.....
.....

4. Please indicate at least three countries that you think your region should collaborate for the development of a sustainable tourism (through cross-border projects, initiatives, events, etc.)?

.....
.....
.....

10. In your opinion, what are the main threats that could arise in the future development of tourism in your area?

.....
.....
.....
.....

9. If any of the threats you mentioned (please specify which) happen, what problems could arise for tourists, tourist companies and organizations in your area?

.....
.....
.....
.....

SPELEOLOGY TOURISM

1. Specify sites associated with this type of tourism located in your area that currently have low attendance or are outside the main tourist routes:

.....
.....



.....

2. How do you evaluate the possibility to include the listed objects in existing routes:

- rather positive
- rather negative
- other (please specify)

3. How do you assess the possibility to include the listed objects in new routes?

- rather positive
- rather negative
- other (please specify)

ADVENTUROUS TOURISM

1. Specify sites associated with this type of tourism located in your area that currently have low attendance or are outside the main tourist routes:

.....
.....
.....

2. How do you evaluate the possibility to include the listed objects in existing routes:

- rather positive
- rather negative
- other (please specify)

3. How do you assess the possibility to include the listed objects in new routes?

- rather positive
- rather negative



other (please specify)

CULTURAL TOURISM

1. Specify sites associated with this type of tourism located in your area that currently have low attendance or are outside the main tourist routes:

.....
.....
.....

2. How do you evaluate the possibility to include the listed objects in existing routes:

rather positive

rather negative

other (please specify)

3. How do you assess the possibility to include the listed objects in new routes?

rather positive

rather negative

other (please specify)