



ANALYSIS ON THE WILLINGNESS OF LOCAL STAKEHOLDERS TO CONTRIBUTE TO THE PROMOTION OF IDENTIFIED RESOURCES

*QuesTour –
Valorisation and capitalization of
unexplored tourism cultural and historical routes in the cross-
border region Bulgaria-Serbia*

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Any translation into other language shall be deemed as reference and English version shall prevail in any case!



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1. SCOPE AND METHODOLOGY OF THE STUDY

The approaches to stakeholders are different and depending on the point of view (who is playing the central role?) and the tension between social and economic management vision (tourism is considered just a market or a complex framework?). By definition, the stakeholder theory argues that the definition of stakeholder is “any group or individual who can affect or is affected by the achievement of the organisation’s objectives.”¹ Groups might directly influence managerial decision-making,² but a working stakeholder’s network is crucial for sustainable tourism. In this study, the focus is on particular stakeholders and their networks and the role of each of them on the tourist market in a local and regional level. The willingness of local stakeholders to contribute to the promotion of identified resources is considered both readiness and will, i.e., the desire to get involved and their abilities and experience in elaborating and promoting the tourist products.

This analysis is based on a survey conducted at the end of November 2020, in December 2020 and in January 2021 on 12 districts, 6 in Bulgaria and 7 in Serbia. In Bulgaria, they are West-border districts of Vidin, Montana, Vratsa, Sofia, Pernik and Kyustendil. In Serbia, those are the districts of Nis, Jablanicki, Pcinski, Toplica, Pirot, Zajecar and Bor. This analysis should serve as a basis for the development of Business Model Generator for cross-border cooperation and sustainable development of tourism potential, potentially rich areas of these regions, but insufficiently represented in the practice of tourism. The research was done on a design that both analysts have approved and had the following stages:

1) Preliminary research and identification of stakeholders for online questionnaires and on-site survey

Preliminary research explores municipality websites, community centres, local newspapers, alternative tourist operators and tourist bloggers, local development programs, social network groups and pages, ethnographic publications, ICH registers, etc. In Bulgaria and Serbia, mailing lists of respectively 179 and 112 stakeholders distributed in districts’ lists were elaborated.

2) Preparation and dissemination of questionnaires

Analysts together designed and elaborated joint questionnaire that was disseminated among target groups. It contains questions on stakeholder’s data, contact information, tourist activity, number and structure of visitors per year, difficulties or obstacles they have faced, their readiness for increasing the number of tourists and the steps they have taken so far. Only contact information was obligatory, opinions in the other fields have been freely expressed. The stakeholders were asked to fill out questionnaires on tourist sites that might be interesting for our study. Not all of them did so, but some filled more than one. Also, not all stakeholder proposals were included in this project. A selection was made from the most interesting, but very little exploited heritage, in the opinion of tourism experts engaged in this project.

3) Qualitative study

The fieldwork addressed only those stakeholders who manage or govern the heritage sites that have been selected. This on-site survey aimed to contact stakeholders directly, interview them in detail on sites they manage, and establish the research connection ‘stakeholder – site’. This is the proper way for selecting stakeholders, to contact and communicate their willingness to contribute to the promotion of identified resources.

¹ Freeman, R. 1984. *Strategic Management: A Stakeholder Approach*, Boston: Pitman, p. 46.

² Presenza, A. , M. Cipollina. 2010. Analysing tourism stakeholders networks. *Tourism Review*, 65(4), 17-30, p. 19.



A qualitative study was also made on the transborder projects that governmental and NGO bodies from the six districts have implemented so far. This process helped us contextualise the stakeholders' policies and efforts and define trends in raising funds in cross-border tourism.

4) Stakeholders datasheets

Finally, Stakeholders datasheets were elaborated to present all institutions, organisations and businesses that expressed interest to contribute. The list is based on online questionnaires that reflect which stakeholders are willing to participate in the project and build an active partnership .

2. DATA ANALYSIS

2.1. ONLINE QUESTIONNAIRES

2.1.1. PARTICIPANTS OVERVIEW

In Bulgaria, 47 institutions, organisations, business and individuals took part of the online survey in about 30 days. They preferred filling out the closed questions and some open questions were left unanswered. 27 of the respondents represent local administration, 7 – NGOs, 6 – state administration, 2 – businesses, 1 – farm or agricultural producer, 2 cultural organisations and 2 others (a citizen, and an organisation supporting business). This proportion of the results does not meet the mailing list ratio used for disseminating the questionnaires, so presumably, the administration is more active in communication with researchers and NGOs than the business. Still, some local administrations did not express interest to the project and its benefits. For instance, the municipality of Kostenets has been invited several times to join the research because an exciting practice on its territory was identified – in the village of Kostenets. Eventually, an appeal was received - to contact directly the major of the village of Kostenets and the municipal authority (which is based in the town of Kostenets) was left outside of the survey. Furthermore, most local administrations have no tourist department, or in the process of sending an invitation for the survey it was found that the published email addresses do not operate, so communication with them was not successfully made.

Lack of interest from the business stakeholders is not surprising. That means a lack of good practices in collaboration with NGOs and scholars, suspiciousness that a joint project would work and bring them any benefits and incomes, diversification of responsibilities, and expectations. Therefore, our survey inherits local and national stakeholders' tensions and mistrust. Some apparent partnership between local authority and museums, local authority and the local branches of national institutions, etc., were found. However, these parties are not equal but in a hierarchical relationship.

Figure 1. Stakeholders types, Bulgaria and Serbia

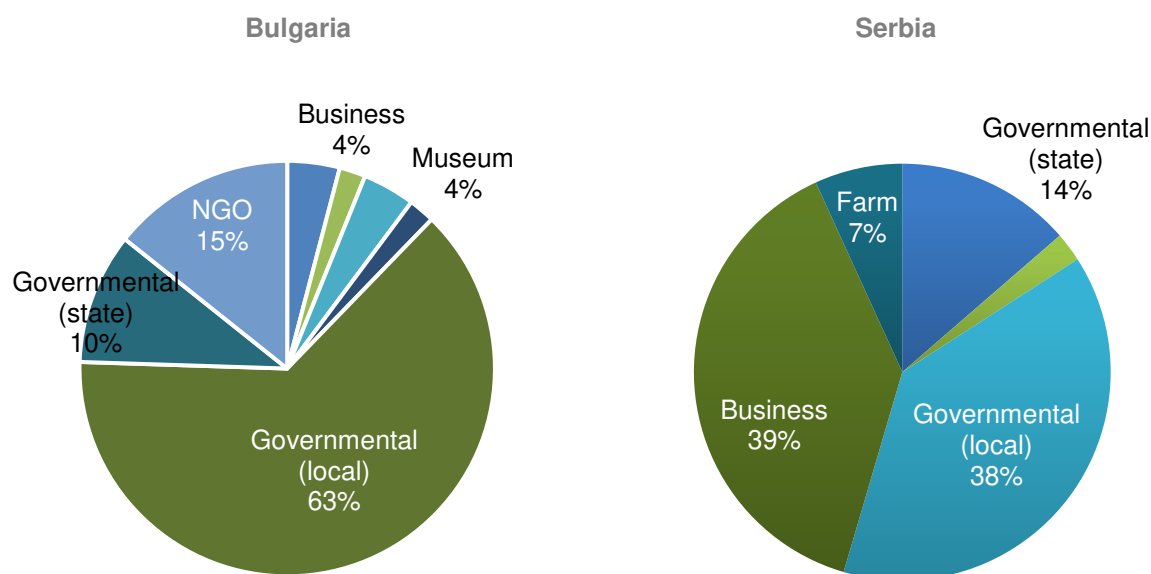
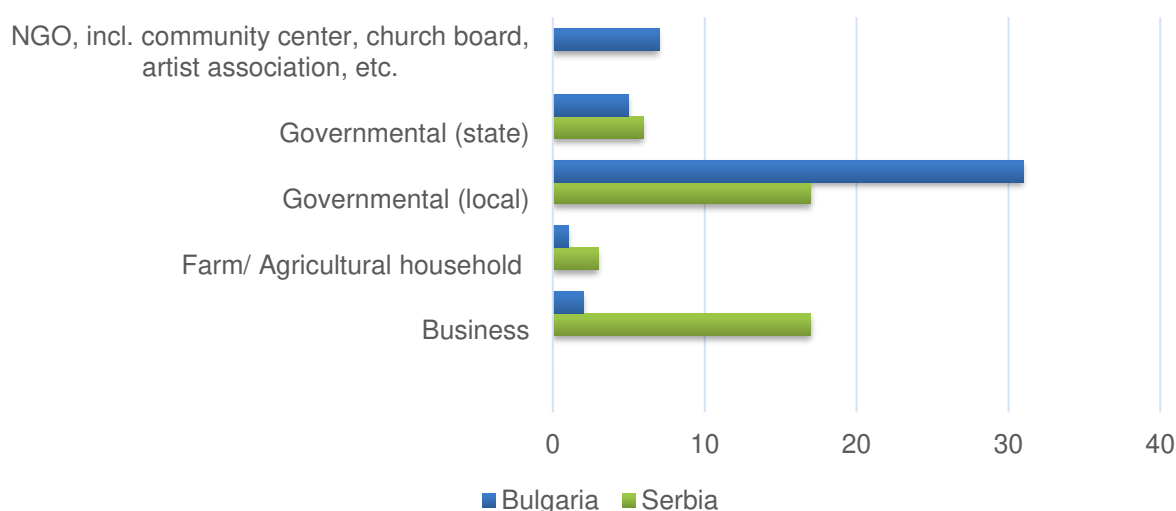


Figure 2. Stakeholders types (comparative chart)

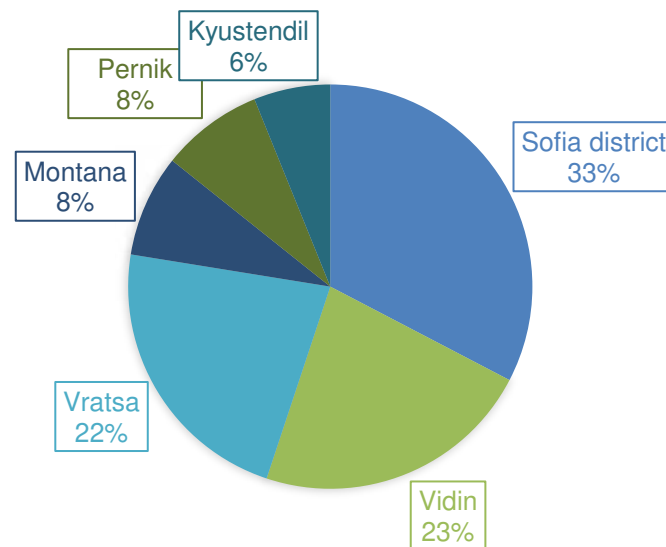


In Serbia 44 institutions, organisations, businesses and individuals took part. They also preferred filling out the closed questions and some open questions were left unanswered. 17 of the respondents represent local administration, 17 – business, 6 – state administration, 3 – farm or agricultural producers, and 1 government regional administration. Unlike the Analysts in Bulgaria, in Serbia the NGO sector was not included in this survey, believing that the survey should be more concentrated on the real sector of tourism as much as possible, in order to get the most accurate results. Also, unlike Bulgaria, interest in participating in the project is far more evenly distributed in the public and private sectors.

In Bulgaria, local and state administrations do not see themselves as business figures, although the business identifies them as owners and sellers of tourist attractions. In the questionnaire on the

stakeholder's business sector, there were only 2 answers, and in the Heritage survey, only administration and museum have entered sites or practices.

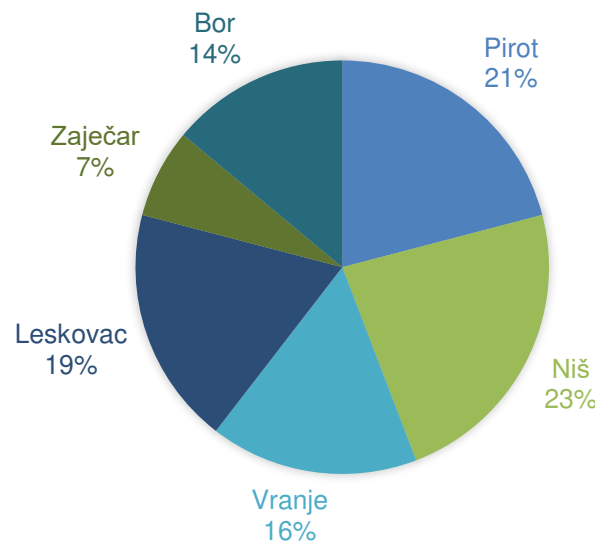
Figure 3. Number of stakeholders per district – Bulgaria



Geographical distribution of the participants in Bulgaria relatively met the preliminary expectations. It does not correspond with the number of the population but with the number of municipalities in the districts.

The response in Serbia do not meet the mailing list ratio used for the analysis and the administration is more active in communication with the governmental institutions (especially local) and business. There is a shortage of a stakeholders that provide different types of accommodation, like guesthouses, farms, ethnic villages, etc.

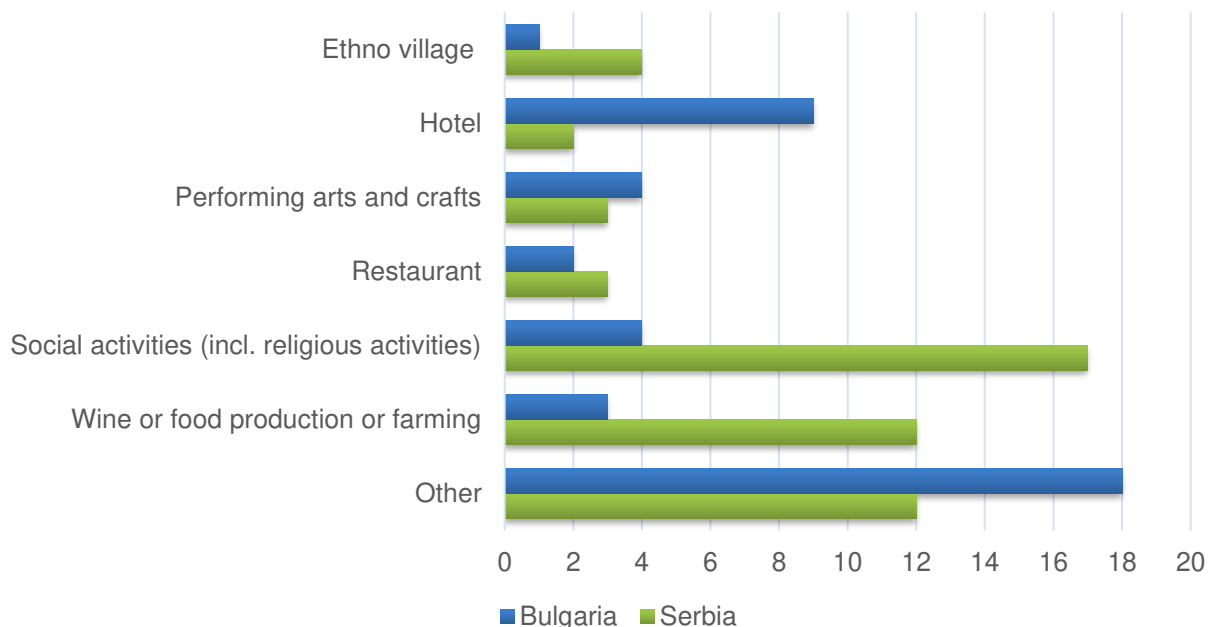
Figure 4. Number of stakeholders per district – Serbia



Two biggest tourist regions represent almost half of the sample: Niš 23% and Pirot 21%, together 44%. That was not a surprise as Nis is the biggest city in the region and attracts most of the tourists who are visiting this part of Serbia. On the other hand, Pirot and its surrounding are becoming more and more popular destination for both domestic and foreign tourists. Rich history and culture background of Pirot, good road connection with Bulgaria and attractive nature of Stara Planina (Balkan Mountain) are probably the main reasons for this trend. A willingness to participate in the survey was the weakest in Zajecar region which makes only 3.7% of total stakeholder's number who participated in the survey. To compensate that, we have made extra efforts in research for heritage spots to include in the project.

The activities represented in both countries were diverse. The chart displays the variety of social and business directions that stakeholders develop still in connection with tourism. The stakeholders were encouraged to choose more than one option; however, many of them just left the field blank. Two sections deserve particular attention: 'Social activities' and 'Other'. These are the categories for all information centres, museums, specialised media, festival organisers, etc. that are not a typical tourism stakeholder concerning T&H industries.

Figure 5. Stakeholders' main activity



Stakeholders that took part in the survey are of various ranges. The result is not entirely representative due to last year experience. Some of them attract about 100-500 visitors (community centres of Piroto, tourist centre of the municipality of Babusnica, guesthouses, Live Natural - Tamjanica etc.) but others about 35,000 or even 70,000 (municipalities of Varshets and Belogradchik (BG), Lepenski Vir (SRB)). In the cases of local administration, presumably, the number of visitors excludes the number of hotels guests – and that is definitely concerning Varshtets and Samokov. **In Serbia, local tourist organizations left the question of the number of visitors unanswered in most cases, possibly because of the disappointing numbers from the past year. One exception was Bojnik with 1000 visitors.** Most of the visitors are domestic – about 64% for both countries, and only one fourth of the stakeholders report predominantly foreign visitors (about 26% in Bulgaria and 4.5% in Serbia, which is due to different statistics caused by COVID-19 pandemic). This result is perhaps due to the huge number of domestic guests who were not able to travel abroad. On the other hand, some of the stakeholders did not answer these questions, probably due to disappointment from the last year results.

Figure 6. Approximate number of guests in a year

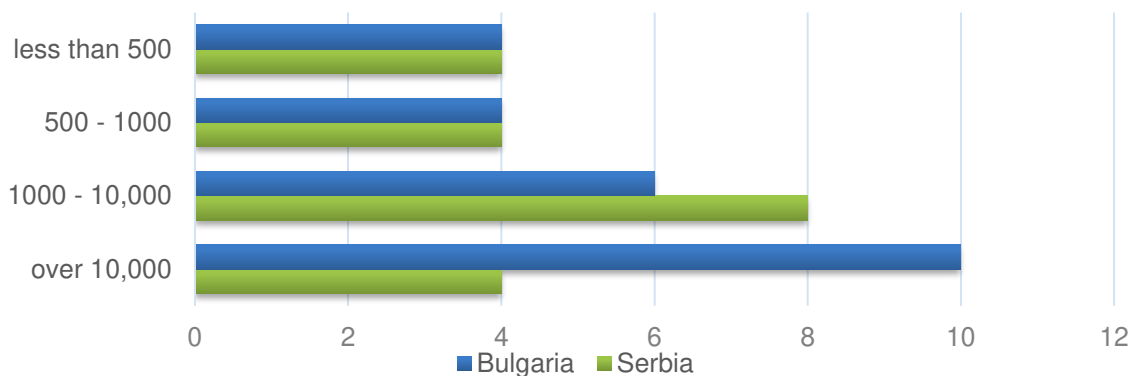
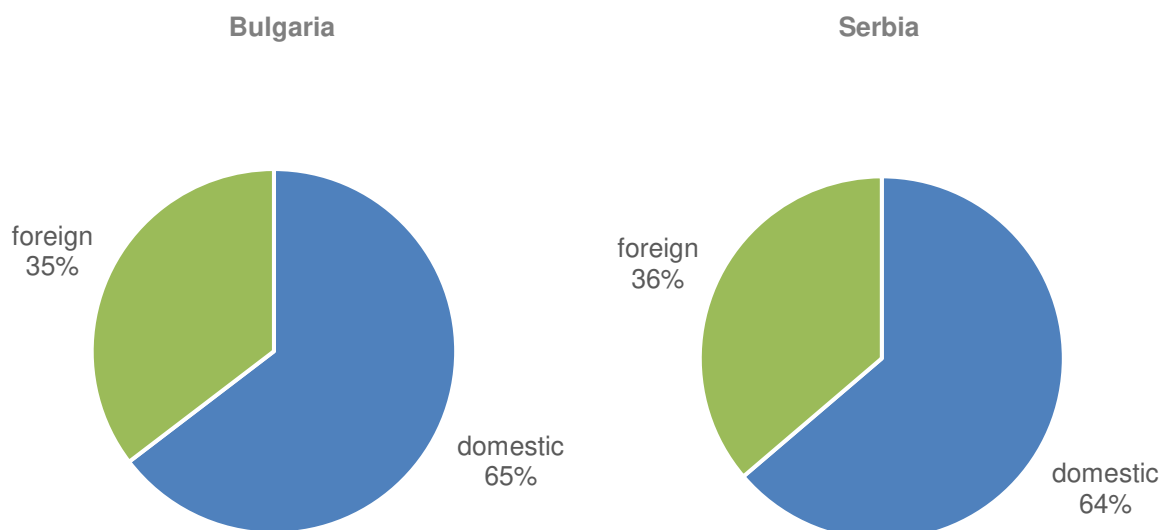
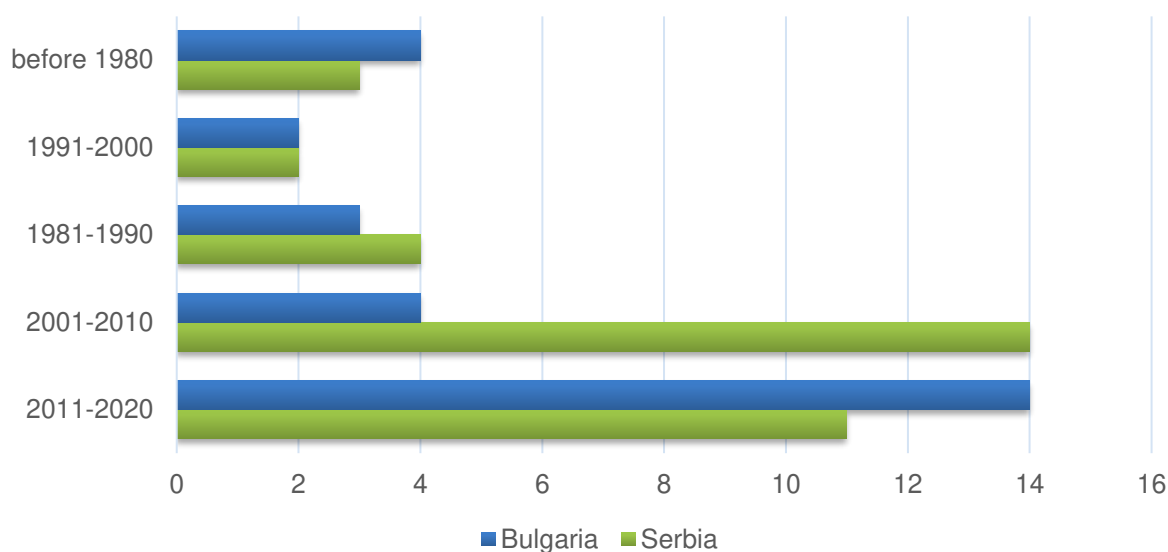


Figure 7. Structure of guests/visitors



The 'age' of stakeholders also represents diversity of the stakeholder. Again, the results in Bulgaria and Serbia are comparable but the fact that the municipal and state governmental bodies do not indicate the year of their establishment should also be mentioned. That is not surprising, however many local authorities have filled out the year of establishment of an activity of them (a festival) or of opening of a tourist attraction. Nevertheless, the trend, new stakeholders and heritage sites and events to be promoted, is obvious.

Figure 8. Year of the stakeholders' establishment

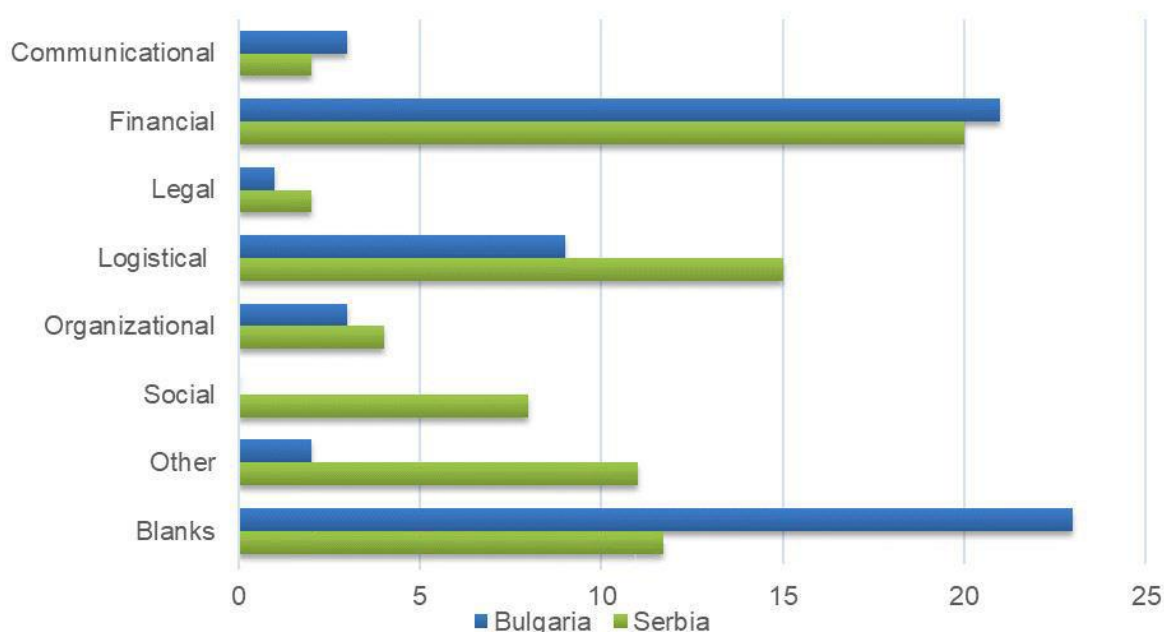


Most stakeholders do not operate for more than 20 years, only 3 of them are in business longer than 40 years. 11 of them are younger than 10 years, 14 work shorter than 20 years (but longer than 10).

2.1.2. STAKEHOLDERS' ACTIVITIES FOR PROMOTION OF LOCAL NATURAL AND CULTURAL HERITAGE

To identify stakeholders' ability to contribute to the promotion of local, natural and cultural heritage, they were asked to share their **problems and difficulties**. In Bulgaria, 23 -about half of the stakeholders did not answer the question, but it is unclear whether they do not face any difficulties or just left the field blank. In Serbia, we have a slightly different situation. Only 12 stakeholders left the field blank, while the others gave the information that was needed. Two main difficulties and obstacles that stakeholders face are financial and logistical. Some of the organizational problems are that there is not enough potential and experience in the institutions. Social difficulties are connected to the problem in communicating with other organizations, institutions and communities.

Figure 9. Difficulties and obstacles that stakeholders face



Analysis of the nature of difficulties would be helpful for enhancing stakeholders' ability for networking and development of their effort's concertation. The large number of "other" answers is a problem as well, because no action can be taken based on completely unspecified answers. In this analysis, only real answers have been considered because they are the basis of politics and measures and they testify to the stakeholder willingness to contribute and to get involved.

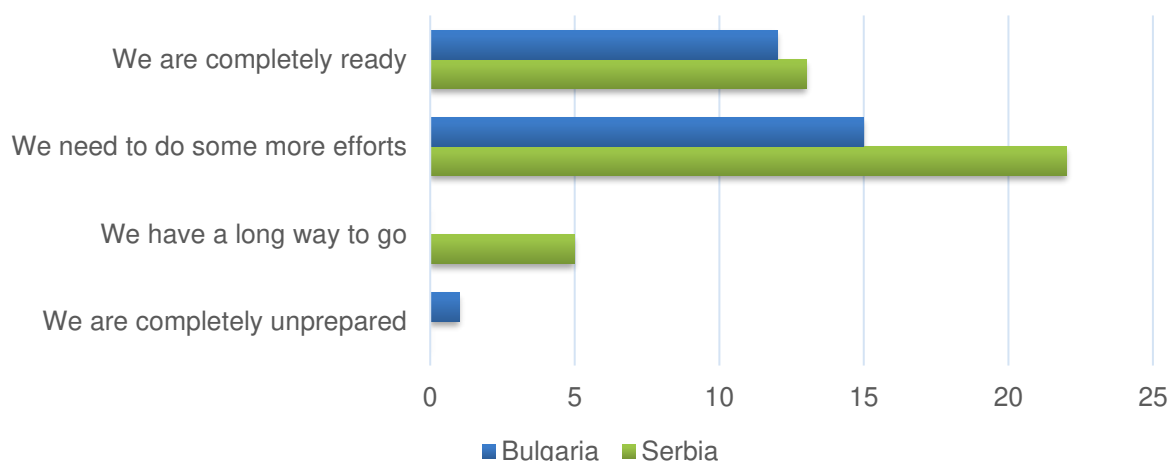
Most stakeholders report financial issues (45% (BG) and 32% (SRB)) and it is interesting that out of those 32% of answers, 30% come from Niš region, as in Bulgaria, there are no particularly significant ranges. Many stakeholders acknowledge logistic problems (bad roads, HR problems, etc. – 38/19%). That means that stakeholders need more funding and that financial support for socialisation and promotion of the site or practice is out of their competence. Regardless of the border region's economic stagnation, we should admit that the transborder programme's financial mechanism is suitable for developing local tourism facilities (see the next chapter).

Other problems also appeared, and the good news for Bulgaria is that no stakeholder feels lack of support from the local community. That is very important, as far as the local community is not just an amount of people living in the area but also represent a local business, NGOs, educational and cultural institutions, etc. However, stakeholder's evaluation could be inadequate because adverse community reaction would start after launching a project to promote a site or practice. Briefly, if the stakeholders have done nothing, they are not able to consider community support. In Serbia, 8 stakeholders shared that they have social difficulties. These difficulties have been stated by predominantly from stakeholders located in Nis district (50%), and mostly concern private businesses (for example, SUR Peglana kobasica in Pirot), but the case of the Archaeological site of Kale Krsevica is somewhat particular in the sense that it is a national institution that encountered issues while doing excavations on the site due to the resistance of local proprietors and had to put its activity to a halt. In most cases, the stakeholders that have stated problems with the community support have launched diverse projects and actions, but in some cases they have not, which can be further interpreted as unwillingness in some cases of broader institutions or local communities to support and develop businesses.

Further, stakeholders were asked to evaluate their readiness for increasing the tourist flow. There are significant differences between the results in Bulgaria and Serbia. In Bulgaria, more than half of the stakeholders find themselves ready for increasing guest numbers (53.6%), while in Serbia almost the

same number admit they need to do some more efforts (50,8%) and only one third find themselves completely ready. Many Bulgarian stakeholders admit that they need to do some more efforts (42.9%) but only 1 acknowledges that is not prepared at all (the Municipality of Kozloduy). In Serbia, by contrast, 13% realize the long way they have ahead to reach the goal. There are not completely unprepared among them, but there are also two of them without an answer. The stakeholders seem to have been quite objective in assessing their readiness and the results can be considered good.

Figure 10. Stakeholders readiness for increasing tourist flow



In the online survey, the stakeholders answered a question on the **steps they have taken** in regard of increasing the number of tourists. Almost the same stakeholders that have shared no problems did not acknowledged any undertaken initiatives. Similarly, in Serbia, for those stakeholders that have undertaken some steps and launched initiatives to increase the scope of their activity, some problems were also stated, while only those stakeholders who did not state any problems, did not report any launched projects either.

According to the survey results, in Bulgaria, to prepare themselves, stakeholders **launched several activities**, mainly at their expenses (69.2%) but also started projects (34.6%) or looked for help from the state, local authorities, business, etc. (38.5%). In Serbia, the pyramid is inverted:

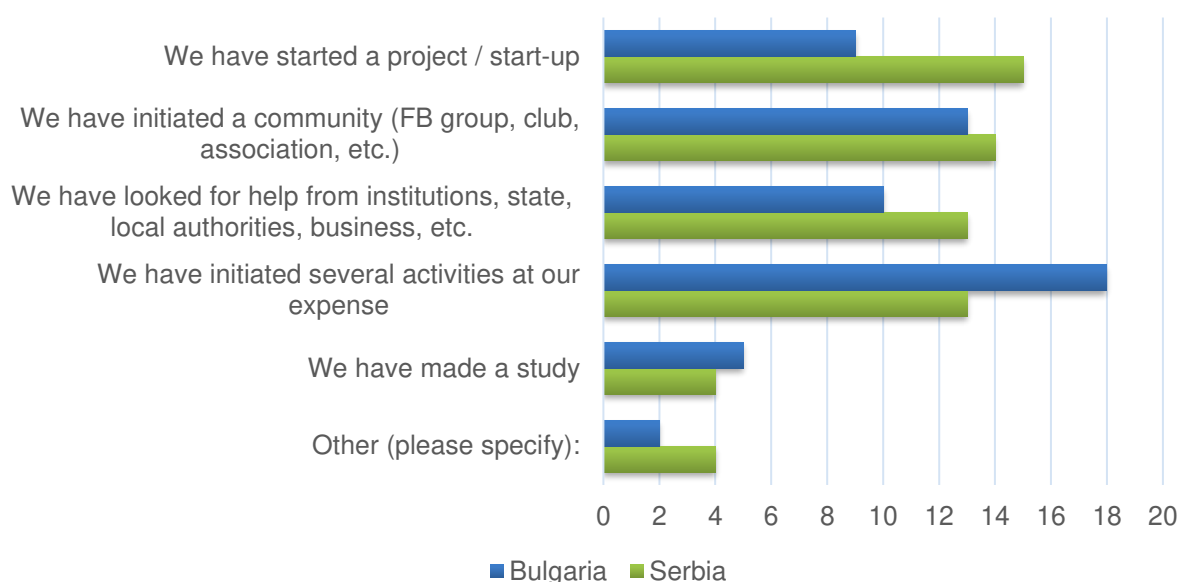
Apparently, stakeholders in general, seek for balance between own and external investments. The analysis does not confirm that stakeholders are looking for financial support and do not try to elaborate projects and apply for funding. In general, we must conclude that they diversify rising funding for promotion of cultural and natural heritage on their territories both in Bulgaria and Serbia.

Few organisations (5 in Bulgaria and 4 in Serbia) share that they have made or assign a study to be conducted, and these organisations are local administrations in Bulgaria. However, in Serbia, in two cases private stakeholders report having conducted a study (a winery from Zajecar district (Winery Jovic) and one from Nis district (Lamago d.o.o. Tamnjanica). Surprisingly, state and local governmental organisations do not use local museums and NGOs' potential to support them with surveys.

Half of the stakeholders in Bulgaria and only one third in Serbia realise the need for community support. Therefore, they initiated such via social networks, as a club or association, etc. Civil participation in decision-making, heritage policies, and sustainable tourism practices is critical. In civil societies, communities have active representatives in local councils and industrial chambers. It is a good idea the local and state governing bodies to whip the locals up in identifying, socialising, and promoting cultural and natural heritage. Montana's Municipality opened FB pages for festivals that it organises, regional

museum, and town gallery and admits that these pages become the cores of communities like folklore formations, community centres, etc. Some of the stakeholders in Serbia are making lot of effort to promote their activities. The National Museum in Leskovac has several projects that deal with the promotion and improvement of content. There is the implementation of the project Heterotopia - IPA CBC Bulgaria-Serbia Program, which main goal is sustainable development of cultural tourism. The National Museum in Leskovac announces its activities through the official internet presentations, Fb PAGE and Instagram profile. Tourist organization of Vlasotince supports the work of associations, youth groups, mountaineering and cycling societies etc. They also think it is necessary to employ a larger number of active young people who would constantly work on field research, as well as private sector education that can directly or indirectly affect the improvement of conditions for the development of various types of tourism.

Figure 11. Undertaken steps to increasing tourist number



In this regard, the in-depth study based on answers to the last question gives us further details. Stakeholders are working on the Bulgaria-Serbia IPA Cross-border Programme (2007–2014 and 2014–2020) and other EU programmes. The Museum of Pravets already implemented three projects to promote and popularise sites of cultural and historical heritage and conservation and restauration, exposure and socialisation of immovable cultural heritage. The Municipality of Montana has carried out number of projects for socialisation of cultural and historical heritage and elaborating tourism policies and strategies. It restored Montana's ancient fortress and nominated it as a cultural heritage site in the area; the regional museum was renovated too, and new expositions were opened. Osogovo Tourist Association in partnership with two local schools carries out the project "Green direct line" within the EEA Grants Programme. It aims at promoting poorly known sites of natural heritage in the region of Kyustendil. The Municipality of Chelopech carried out several projects – for the first start-up settlement in Bulgaria, for organised tourism for children and adults (Murganche Club). They also built a nature trail in partnership with a senior's club. The Municipality of Tran adds its experience with EU projects for building tourist sites.

Stakeholders point out their efforts to promote heritage sites through advertisement and media partnerships (Municipality of Montana, Samokov's Tourist Centre, etc.). In 2017, Botevgrad became the



first Wik town in Bulgaria. The Municipality elaborated a free online encyclopaedia where all visitors could find and enter information on all significant cultural and natural sites, historical places and important persons from Botevgrad and the region. This practice is good for all small towns to build a community and share various information on the most significant sites and events on their territory.

In the times of COVID-19 online marketing becomes crucial. Therefore, some stakeholders launched initiatives to keep in touch with auditory and maintain its interest and readiness for future cooperation. Samokov's History Museum developed an online shop to attract visitors to all its branches. The Municipality of Elin Pelin together with its social network community carries out two online festivals ("Lazaritsa" and "Dancing with Shops"). Meanwhile, local authorities continue their investments in developing accessibility and landscaping of tourist sites.

In Serbia, Tourist Area Manager Lepenski Vir d.o.o. with tourist workers of Majdanpek and Donji Milanovac – Launch of "Double Dawn on Lepenski vir" – an event that is organized for the first time at this famous archaeological site, and as part of it two concerts will take place. An example that even during a pandemic, certain, in this case, archaeological sites can be promoted in unconventional ways. It should be noted that this initiative is of a local character (attracts the attention of only the media in Serbia), but if it were properly maintained and developed, it could also have an international role in the promotion of the site.

In 2015, the National Museum of Leskovac was declared the best museum in the territory of the Republic of Serbia by the Museum Society of Serbia. The people of Leskovac undoubtedly won the title of the best in 2015 because of the organization of two exhibitions about the "golden age" of Leskovac and soldiers from this area in the First World War, as well as because of the new exhibition of the National Museum that opened in May 2014. (source – Southern News).

Mountaineering Cycling Association Orlovac organizes many international competitions from UCI races to the Balkan Championship. In 2020, for the sixth time, it will host a race, part of the calendar of the World Cycling Federation. M ENTERIJER GEADNJA CUP, this year is C1 class, for categories of juniors and elites (men and women). At the same time, it is a race where the competitors fight for points that will take them to the Olympic Games. Unfortunately, due to the pandemic, this event was not entirely held. They also plan to build the first bike park in Serbia.

All the mentioned efforts could not be easily generalised because of their variety. Basically, they call attention to the uncountable diverse possibilities before stakeholders regarding tourist products and routes, advertisement, mediation, networking, rising fund, etc.

Last year, COVID-19 pandemic was a crucial factor in the tourism market worldwide, particularly in Bulgaria and Serbia. This situation partially influenced the research, but the online survey reflects slightly the specific measures stakeholders took in 2020. In general, tourism experienced a serious decline. Bulgarian statistical institute reported 59.2% for November and 70.1% for December fewer nights spent in the accommodation establishments than the same months in 2019.³ The foreign tourist arrivals dropped -53.5% and -63.3%.⁴ The financial decline was bigger, 62.5% and 71.3%.⁵ In Serbia, the Statistic Office reports that in December 2020, compared to December 2019, the number of overnight stays of domestic tourists fell by 46.7%, while the number of overnight stays of foreign tourists fell by 75.6%.⁶

In the next research stage, the pandemic situation was much reflected. However, it must be admitted that the current project's ideas and goals meet the expectations and new trends for tourism's restart.

³ <https://www.nsi.bg/en/content/6941/tourism> (last visited 12.01.2021).

⁴ <https://tradingeconomics.com/bulgaria/tourist-arrivals> (last visited 12.01.2021).

⁵ For more detailed information of financial impact of COVID-19 pandemic and the state of emergency in Bulgaria see https://www.nsi.bg/sites/default/files/files/pressreleases/Accommodation2020-12_covid_en.pdf (last visited 12.01.2021).

⁶ <https://www.stat.gov.rs/en-us/vesti/20210129-turisticki-promet-decembar-2020/?s=2202> (last visited 12.01.2021).

For instance, the World Tourism Organization (UN) published a roadmap to transform tourism needs that includes advanced innovation and digital transformation of tourism and insists on fostering sustainability and green growth⁷.

2.2. CASE STUDIES

2.2.1. RESEARCH OVERVIEW

Overall, 37 stakeholders have been interviewed in Bulgaria and 44 in Serbia in the course of fieldwork. The following fieldwork trips have been taken in Bulgaria:

27-29 Nov 2020: Vidin district (Municipality of Vidin, Municipality of Chuprene, Visitors Centre of Chuprene, Municipality of Dimovo, Borovitsa Winery, Borovitsa Diary, Madona Inn)

17-19 Dec 2020: Kyustendil district (Municipality of Kyustendil, Osogovo Tourist Association, Tourist Centre Nevestino, Kopilovtsi Monastery, Svezhest Diary)

20-22 Dec 2020: Vratsa district (Municipality of Mezdra, Ritlite Visitors Centre Lyutibrod, Strupets Monastery, Tipchenitsa Winery, Rachenitsa Dairy, Nefela Dairy)

4-5 Jan 2021: Sofia district (Municipality of Novi Iskar, Cheparlinski monastery, Razboishki monastery, Municipality of Dragoman, Tourist Information Centre of Dragoman, Mogila Dairy, Yarlovo Dairy, Municipality of Dolna banya, Municipality of Koprivstitsa, Municipality of Dolna malina, Historic Museum of Samokov, Budnoto Oko Resort, Arena hotel Samokov)

6-7 Jan 2021: Montana district (Municipality of Montana, Tourist Centre of Varsets, Municipality of Berkovitsa)

12-13 Jan 2021: Pernik district (Municipality of Pernik, Municipality of Breznik, Regional Museum of Pernik)

Some stakeholders were interviewed by phone (the mayor of Kostenets, Botevgrad Tourism Municipal Enterprise, Bulgarian State Railways, Edelweiss Club and Adventure Net Extreme Sports Club).

The six studied regions are quite different in terms of size, population, economic development, and tourism development. Vidin district's population is about 83 thousand people in 11 municipalities and Sofia district's population is 227 thousand in 22 municipalities. The smallest number of beds for tourists we have in Pernik district (569) and the biggest one is again in Sofia district (8287) – about 14 times larger than in Pernik although the population is only double. The statistics of these beds use is more significant – about 18.5 thousand people stayed overnight in Pernik district (only 2800 foreign residents) and 350 thousand – In Sofia district (100 thousand foreigners). The difference between stay costs in Pernik and Sofia districts is double.⁸

The following fieldwork trips have been taken in Serbia:

25, 26 Nov 2020 Pirot District. Villages of Dojkinci, Slavinja. Sites: Tupavica waterfall, Rosomacki Lonci-canyon Rosomacice, a viewpoint Kozji Kamen.

27, 28 and 29 Nov 2020 Zajecar and Bor District. Municipalities of Zajecar and Negotin. Vilages Rogljevo, Rajac, Mokranje, Bukovo Monastery, Vratna Monastery, Vratna Gates. Municipality of Kladovo, Djerdap NP and archeological site Lepenski Vir.

⁷ <https://www.unwto.org/tourism-and-covid-19-unprecedented-economic-impacts> (last visited 12.01.2021).

⁸ <https://www.nsi.bg/bg/content/1978/годишни-данни> (last visited 12.01.2021).



7 Dec 2020 Pirot District, Municipality of Pirot and Dimitrovgrad

10 Dec 2020 Jablanicki and Pcinjski District. Municipality of Leskovac, municipality of Surdulica, municipality of Vlasotince, Vlasina Lake.

In Serbia, the six regions that were included in the study differ significantly in the terms of their size, population and economic and tourism development. The biggest district is Nis district divided into 6 municipalities and one city, with the population of 372,404 people, and the smallest one is Pirot, with the population of 92,579 and four municipalities. The biggest and most populated district attracts the most tourists; in Nis district there were 141,537 visitors in total, 85211, foreign, Zajecar district was second best with 178,848 visitors, 31036 foreign, Bor district was visited by 88,392 visitors, 19,815 foreign, Jablanica district by 34,579 visitors, 14592 foreign, Pcinja district by 31,678 visitors, 9495 foreign, and finally Pirot district by 28,720 visitors, 16,086 foreign, last as far as number of tourists is concerned, but the only one to have had more foreign visitors than domestic⁹. In the Southern region of Serbia, 78618 beds have been registered in 2019¹⁰. The price of accommodation is expectedly the highest in Nis district, with a wide variety of price range, whereas the Jablanica district has the cheapest accommodation – which in some cases can be as far as 4-2 times cheaper than staying in Nis district.

These numbers show that we cannot rely on tourist statistics to analyse local stakeholders' promotion of cultural and natural heritage. Besides economic development tourism types should be considered (ski, sea, and spa tourism produce larger number of nights) as visiting cultural and natural sites often does not need accommodation.

2.2.2. RESEARCH FINDINGS

Within our fieldwork, the promotion of cultural and natural heritage was discussed with stakeholders that govern or manage the sites and practices that we identified. Besides information on contacts and visitors' number, they were asked several questions a bit different than the questions in the online questionnaire:

Why people visit this place?

As the analysts spoke with the stakeholders about sites which are not explored enough and are not popular tourist destinations, the answer often connects a particular location with a more popular one. For instance, St. Petka rock chapel is visited because of the Erma river gorge near Tran; Borovitsa rocks – because of Belogradchik rocks and fortress; the churches of Pastuh and Vukovo – because of St. Yoan Rilski's birthplace in Skrino, etc. There are also places with a specific audience because of few factors: some of them are not easily accessible (Garlo well-temple, the Cross-stone area, Shegava canyon, Chuklite Rocks, etc.), or are not of mass interest (Belite skali nature trail, Salon of Naive and Intuitive Art at Town Gallery of Belogradchik, the Monument of Mourning Soldier in Vidin, etc.). Their visitors have strong motivation and interest (and these visitors are the project's main target group). Cultural practices in the selection list often attract locals who have migrated to return to their home place in the days of the festival or ritual (Albotin Holy Monday Festival, Surva traditional festivals in Pernik and Breznik, etc.). The connection between more and less popular sites is both helpful and harmful for the less popular ones because the famous tourist points attract tourists. Still, sometimes these tourists have no time and interest to visit nearby places.

When asked about unexplored sites interesting for tourists, the stakeholders proposed sites for numerous reasons – their proximity to another, more popular tourist site (for example, when visiting lake Vlasina, a visit to the churches St. Elijah and Palja monastery are recommended), - for their

⁹ <https://publikacije.stat.gov.rs/G2020/Pdf/G202013047.pdf> (last visited 16.02.2021).

¹⁰ <https://publikacije.stat.gov.rs/G2020/Pdf/G20202053.pdf> (last visited 16.02.2021)

exceptional value as a natural heritage – Vratnjanske gates, Tupavica waterfall etc., which are often more difficult to reach than a typical tourist attraction, ideal for targeting highly motivated people with specific interests. A lot of different types of festivals and organized festivities were cited as events with a potential interest for tourists – gourmet, ethnic, folklore and other type – often held in lush natural environment, for example, local cooking competition at Kale Krsevica. Some places and festivals have great publicity which already gave a positive result with inflow of the domestic and foreign tourists. Great example is Tourist organization of Nis with Rostiljijada and Carneval festivals.

What further you could offer to tourists?

Only a few stakeholders are promoting other less popular attractions and places in their regions. In the municipality of Chuprene besides beautiful medieval and Renaissance churches of Dolni and Gornli Lom, Chuprene and Varbovo, the municipality has opened a Visitor Centre with an auditorium for workshops and expositions. It organises Torlaks Festival, offers Torlaks meals and folklore for tourist groups. The Berende church's host and Razboishki monastery's manager promote Cheparlantsi monastery and some less explored and hardly accessible natural sites in the area. It is because the visitors are usually mountaineers or pilgrims but not ordinary tourists. Usually, stakeholders offer a place to stay in or where visitors could have meals or buy wine and food. That is the case of Venetsa cave – they advise visitors to visit Madona Inn in Falkovets and purchase wine from Borovitsa winery. That practice could be useful to facilitate tourism but is not helpful for the very tourist sites – an example: in the case of Venetsa cave, visitors usually come from distant places and already have found a place to stay. What is more important is that this is a sign for lack of network between stakeholders, which is among the significant factors for regional development. Another problem is that these destinations are getting once-in-a-lifetime tourist sites – visitors just check the place and never come back.

In Serbia, stakeholders are promoting less popular sites in their regions only in rare instances. One good example is the Museum of Majdanpek, which alongside its permanent exhibition, is pushing forward the archaeological site of Rudna Glava, with fully guided tours with museum guides, even though the road to the site is in bad condition and makes the visits possible only in dry weather. In another case, in Nis district, the accommodation Ramonda Serbica, offers plenty of added activities aimed at exploring regional activities and sites, such as grape harvesting in Sićevečki vineyards, wine tastings in the nearby winery Kratina, tour of natural heritage Brljavski kamen, hiking Sićevečka gorge, participating in the work of an art, literary or photographic colony held in Sićevo etc.

What problems do you face?

Two central problems appeared in the discussions with the stakeholders both in Serbia and Bulgaria. The first relates to the insufficient infrastructure in some regions (Godech, Nevestino, Breznik, etc.), that briefly means terrible condition of the roads. The other is the area's low economic development, which prevents locals from visiting paid cultural events and tourist sites. It is an interesting observation as far as it expresses locals' expectation of regional tourism. Some specific problems appeared as well. For instance, the Municipality of Chuprene cannot socialise a cave that the state has transfer to it because of bats population. The Municipality of Dragoman cannot open Berende church for visitors because the Bulgarian Orthodox Church processed a restoration that continues two years so far. In Serbia, the archaeological site of Kale Krsevica remains not fully explored, as it lays on the property of local people, who do not want to give permission for excavations to continue.

Of course, the most significant problem during the period of our research was the measures against COVID-19. They concern mainly festivals and places where guests eat and stay. Quite new medieval festival in Mezdra and the traditional festivals in Chuprene and Kapitanovtsi were postponed, restaurants of the dairies in Konyavska mountain and Nefela near Vratsa were closed for visitors. Surva festivals in the villages of Pernik and Breznik areas were closed for guests, and only locals took part in. The consequences of the measures against COVID-19 were discouraging for new start-ups and projects. Similarly, to Bulgaria, no significant festival could be held during the summer of 2020, or they took place in front of a restrained number of audience (Nisville jaz festival, for example) and the reported



number of tourists for the past year was significantly lower than the previous years, with much less foreign tourists.

What steps have you taken to promote your sites/practices?

Besides working on projects (with or without funding), stakeholders took some essential measures to socialise and promote the site and practice of cultural and natural heritage in their territories. The stakeholders often do not consider the following acts as specific measures but as ordinary policies that they are expected to take. Among the most significant ones is establishing a particular institution to take care of tourism issues. Usually, it is a tourist or visitors centre (Sapareva banya, Samokov, Varshets, Dragoman, Gorni Lom, etc.) or a municipal enterprise (Botevgrad, Koprivshtitsa, etc.). Local business establish associations or the regional chambers of commerce and industry act on behalf of them (Chambers of commerce and industry of Vratsa, Vidin, etc.). No stakeholder shared that has taken part in tourist exhibitions. However, within further research, we found that the Tourism Municipal Enterprise of Botevgrad and the municipalities of Samokov, Etropole, Kyustendil, Varshets, Sapareva banya, etc. participated in the International Tourist Fair Holiday & SPA Expo in Sofia in 2020. As far as not all stakeholders take part in fairs and expositions and are members of associations, we would consider this activity to be a particular measure for promoting tourist sites and cultural and natural heritage.

Besides that, as already mentioned, stakeholders have not built particular networks to boost tourism in their regions. Traditional networks between municipalities in a district and between stakeholders in a town have been observed within the research. The partnership of the municipality and the museum in Samokov or Pernik are potent, as well as the connection between the Municipality of Vratsa and the office of Vrachanski Balkan National Natural Park. These networks are natural and keeping them is not a matter of efforts or purposeful policies. They are neither a local nor regional specificity.

A specific strategy of farms, dairies, and food producers offering products in a separate or joint online shop was also studied. Some of them that have more significant production capacity sell products in large chains (like Metro) but the others are presented in online shops for bio, farm and organic products. Kopilivtsi monastery (with Zhablyano monastery) has its own online shop otmanastira.com and offers products in the [Farmhopping](#) marketplace. Yarlovo dairy products can be purchased in big supermarkets in Sofia and online as well. This online representation of the producers is suitable for goods distribution and advertising their products, however only the live visits would place them on tourism market.

Finally, stakeholders were asked if they are ready to contribute to the promotion of identified resources and their contribution. **Almost all stakeholders declared readiness to participate in joint projects and to provide information about the sites.**

Transborder projects for tourism development measure local stakeholders' efforts. Most of them carry out such projects with Serbian and Romanian partners. As the final reports of Interreg – IPA and Interreg V-A 2014-2020 programmes are not available, only qualitative analysis is possible¹¹. Apparently, only stakeholders from Vidin, Vratsa, Varshets and Montana are active. In some projects, the municipalities or other organisations based in Chuprene, Zemen, Pernik, Mezdra, etc. also participate as partners. About 30 projects for tourism products and development in the six border districts got funding within period 2014-2020. In Serbia, the stakeholders from district of Nis, Zajecar and Pirot (municipalities and NGOs) participate the most, whereas the district of Bor is the least represented in the projects list. The main directions for investigations and elaboration of new products and routes are digital inventories of ICH and cultural heritage in general and popularising multimedia products. Regarding natural heritage, from the Bulgaria's side, most projects have been elaborated not in partnership with Serbian stakeholders but within the Interreg V-A programme, i.e., with a Romanian partner. It is a big gap in identifying and promoting natural heritage in the region and could benefit a lot.

¹¹ Data for the following analyses was taken from ipacbc-bgrs.eu and interregrobg.eu (last visited 12.01.2021).



In Serbia, also, there are 30 projects within period 2014-2020 that were done. For example, project for development and promotion of public cultural and heritage services between Mediana and Montana. Another project was Development of tourism in the border region of Bulgaria and Serbia by creating tourist attractions and exhibition of representative cultural and historical sites of the municipalities Surdulica and Pravets. One of the projects that is just starting is Folklore in cross-border region - key to European cultural identity. Natural heritage projects between Serbia and Bulgaria should be priority. The only project considering the environmental protection started in November 2020. The environment - future and responsibility of all between Botevgrad and Surdulitsa. Since, a variety of unique natural landmarks, natural parks and protected sites, are located in the cross-border area they provide opportunities for diversification of the currently available tourist products and services for sustainable development of tourism.

Considering the available information about objects of all projects, a massive misunderstanding has been observed. Especially regarding ICH and traditional practices, nature and culture cannot be separated because usually, they are in a narrow connection. For instance, cuisine depends not only on cultural milieu but on natural resources, agricultural development, etc. It is quite surmising that almost any projects combine natural and cultural resources for sustainable tourism development. A good example is the Bulgarian-Serbian projects BIKE & WINE that combine natural environments with wine-making traditions.

Several new tourist products and routes have been elaborated: "Dragon boats", "Balloon adventure", "Active art for attractive tourism (ARTOUR)", "Tourism and traditions – colourful, fun, attractive", "Sailing on the Danube", etc. They use local environment mainly as a base but do not valorise it and could be removed and transfer to another place without losing value. In Serbia, several tourist products have been elaborated such as the festival Veni, Vino, Vici.

The following two segments of the project activities are considered critical. The first is Identification of tourist sites and mostly the ICH elements that can be a base for sustainable economic development and tourism in particular. There are not working registries in the countries, only representative lists. The system is not based on fieldwork and does not reflect the real situation. Ethnographic publications are old and only can give information on the history of the element but not on the present state. Therefore, elaborating inventories of ICH elements and relevant sites is the first but crucial step.

The second one is capacity-building that is first proposing and then working on projects implementation. Stakeholders' representatives who have worked on projects in networks can provide a SWOT analysis of the particular site, put it in a context, and organise it as a product but not only a piece of their local pride. It is crucial in the process of developing unexplored sites and practices. The well-known points already have built the necessary infrastructure of roads, accommodation, and other services, as the new ones need to be 'sold' not only to tourists (customers) but also to decision-makers and investors (state, business, tour agencies, etc.).

3. CONCLUSIONS

Local authorities develop a variety of activities to build auditory and to keep in touch with it. They raise funding from diverse sources and involve local educational and public bodies in partnerships. Stakeholders, predominantly governmental ones, expressed willingness to contribute to the selected tourist sites' promotion and development. In what points they are ready, according to the analysis?

Capacity

Most stakeholders have proved their capacity governing other projects and establishing durable partnerships, international as well. At this stage, the capacity-building activities they have taken during recent years are enough. People responsible for tourism development in the municipality offices and PR staff of business units and NGOs, almost without any exceptions, elaborate websites and

communicate with tourists and customers, so they are capable enough to contribute to the promotion of identified resources. However, lifelong learning programmes and purposeful partnerships would improve the capacities.

Marketing resources

Almost all stakeholders have an active online presence and have elaborated or participated in websites and web platforms, mobile applications, and social networks (predominantly Facebook). So, they might use these channels to contribute to promoting, in turn, the identified resources and thus to help to build tourist products of them. Considering other tourist resources, they govern, the stakeholders can include new-identified ones in packages, to promote them along with others – on tourist fairs, catalogues, billboard, etc. As far as not all stakeholders take part in fairs and expositions and are members of associations, this activity is considered a particular measure for promoting tourist sites and cultural and natural heritage.

Protection

Besides others, protecting heritage sites is a significant activity that includes active safeguarding and procedures for legal protection. Governmental stakeholders are experienced enough in legal procedures, but many places are not safe for visitors. Safeguarding ICH elements is especially difficult because it does not depend only on particular efforts towards it but on social and economic conditions. Therefore, it is kind of in-between tourist sectors and society's development in general and stakeholders' network plays the key role.

Audiences

Stakeholders have established and keep audiences which are mostly local and national, but, still, they can easily use them to promote the identified ones. However, it is not certain that an audience collected on geographical principle will be the most proper one for alternative tourism sites. The first step should be taken in the direction of an in-depth study of the audiences.

Besides stakeholder's experience and good practices, also some weaknesses have appeared. The SWOT analysis displays some trends that are specific for the CBR but also problems and risks that are common for the two countries and the Balkans in general.

Figure 12. SWOT analysis of stakeholders

Strengths	Weaknesses	Opportunities	Threats
<ul style="list-style-type: none"> Continuing capacity building in sphere of tourism and environmental development Relatively developed IPA cross-border cooperation in the previous period 	<ul style="list-style-type: none"> Poor experience in elaborating and advertising new tourist products and routes No skills at using the local community support No skills at using the border as 	<ul style="list-style-type: none"> Enhanced tendency towards / potential for major cross-border cooperation activities Cultural/historic tourism and education activities promoting the 	<ul style="list-style-type: none"> HR problems and low local tourist flows regarding increasing depopulation trends and ageing of the population Infrastructure investments potentially adversely



<ul style="list-style-type: none"> • A good network on the local level and developed relations public-private stakeholders • Relatively high support from the local community • Strengthened legal and institutional local, regional and national framework for environment protection • Sustainable development approach increasingly taken into consideration by some local stakeholders • Visible private initiative in the tourist sector responding to the increasing demand for wellness, health, active, adventure and ecotourism • Stakeholders can promote mainly undiscovered area offering new and off-the-beaten-track experiences 	<p>economic and social tool</p> <ul style="list-style-type: none"> • With some exceptions, poor regional network, including trans-border • In some villages and tourist areas, inadequate infrastructure, public utility management (water, sewage, solid waste), and T&H facilities • No sufficient coverage of information centres • Low public investment opportunities (investing little, expecting a lot) • Low level of collaboration with non-governmental sector and scholars in the field of tourism • Projects oriented activities, so the policies are defined by funding programmes, not raising funds considers goals • Varying tourism development in the regions • Lack of co-ordination and effective communication 	<p>region as a multi-ethnic and attractive European location</p> <ul style="list-style-type: none"> • Expansion of alternative forms of rural tourism and organic farming with accommodation possibilities • Improving the existing tourist offer by activating cultural/natural/historical resources and potentials • Increasing the visibility of the crossborder tourism by linking individual offers around main tourist and cultural • Improving bilateral cooperation in marketing of the regional tourist destination • Development of specialized tourist programmes focused on “active” type of holidays and interaction with local people • Safeguarding local ICH, particularly crafts and culinary through sustainable tourism • Improving the integration 	<p>affecting the environment</p> <ul style="list-style-type: none"> • Lack of sufficient resources for current maintenance and preservation of the natural, cultural and historical heritage • Overexposure / overexploitation of specific sites / resources • Big municipalities are better prepared for utilization of public funds • Cross-border tensions based on historical heritage • Excessive commodification of living traditional practices • Relying exclusively on project funding resulting in short-lived tourist practices • Different stakeholders may have conflicting interests that can affect unity of purpose and decision-making, which can interfere with the tourism development • Political and economic
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4. RECOMMENDATIONS

Stakeholders collaboration and cooperation

It is essential not only to be understood but also to practice that stakeholders cannot operate separately. Each of them controls different resources, e.g. expertise, capital, attraction, hospitality facilities, etc., and cannot possess all the resources. To achieve success and sustainability of the tourist market, stakeholders need to work together to formulate and realize goals and create new opportunities. Furthermore, indicators to measure collaborative efforts are needed, and it is a matter of stakeholders' initial negotiation.

Stakeholders collaboration mediation

As far as the tourism sector relates to many other spheres like overall economic development, demographic issues, transportation facilities, hospitality industry, environmental policies, climate changes, etc., an organization to mediate and lead tourism collaboration is to be established or defined. The municipality tourist offices or private tourist agencies might act as a mediator between stakeholders at least on the local level.

Local stakeholders and national tourism policies

National tourism policy targets mostly foreign tourists and promote sites (rarely events) that might attract regional and global tourists, e.g. UNESCO monuments, natural parks, ski, sea and spa resorts, etc. When the national customers are in focus, they are offered products that supplement the national narrative – old capital cities, revival towns, ethnographic complexes. Local stakeholders must bear in mind that they should collaborate with national ones but also need to elaborate on local tourism

development strategies for different customers.

A solution: cross-border collaboration

CB collaboration is a solution to the local tourism problems that stakeholders face being in between the local resources and needs and the national policies. Regional CB economic, institutional, and cultural cohesion is the instrument that might boost all local stakeholders individually and as a network. All regional infrastructure features shall be used – cultural and natural resources, roads and transportation means, funding programmes, institutional ties, etc. Regarding tourism, local stakeholders must turn their sight from the national centres to the region and across the border.



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