Beyond Borders – Introducing Smart Tourism and Sharing Economy

Stakeholder Collaboration and Benchmarking Analysis Within the Framework of the CBC Region

Contents

This is a short version of the complete study. The full version of the study can be found on iege.edu.mk

Executive summary

The purpose of the Study on Stakeholder collaboration and benchmarking analysis within the framework of the CBC region is to assess the current situation in the CBC region regarding stakeholder collaboration. More specifically, several aspects are analysed: type of stakeholders, their role in tourism sector and existing communication and collaboration. Benchmarking analysis is made on stakeholders' collaboration in Albania and North Macedonia. This Study is done as desk research, using secondary data (strategies, reports, development plans, action plans for tourism and/or economic development, reports from currents projects, news and announcements from relevant stakeholders). Also, many documents contributing to tourism sector are analysed, locating the input foreseen or reported on stakeholders' collaboration.

Part of the topic of collaboration or lack of collaboration are existing obstacles and challenges. The challenges in stakeholders' collaboration in the CBC region are elaborated, and specific models and measure are proposed to help overcome their lack of communication and collaboration. The status quo and future developments are described in two specific type of tourism – rural and sustainable tourism. These type of tourism were chosen based on the potential the CBC region has, and planned economic development.

Additionally, it is emphasized that collaboration among stakeholders in tourism in the CBC region should happen not only while drafting and developing strategic documents, and propose action plans. More importantly is to keep the collaboration and set continuous communication while implementing these documents (strategies, planning documents, action plans, projects, etc.).

This study creates clear picture on stakeholders' collaboration, setting the ground for next steps, using some of the proposed models and measures to further work and contribute to positive changes and enhance stakeholders' collaboration. Having an understanding on the importance of the topic and impact lack of collaboration is crucial to make next steps. The conclusions and recommendations can help the primary stakeholders to use this information when making future decisions, and guide them to better solutions in tourism development in the CBC region working jointly and sharing responsibility.

1. Introduction

1.1. Aims and objectives of the research study

The purpose of this study is to investigate the current situation in the CBC region regarding stakeholders' collaboration in a way that is practical and meaningful for tourism stakeholders. This study creates a comprehensive picture and emphasize the importance of collaboration, as well as consequences of lack of collaboration in tourism sector. Understanding the importance and focusing on possibilities is part of the conclusions and recommendation, which relevant stakeholders should find useful (especially the primary stakeholders – public institutions, who have greatest power and responsibilities).

The **main objectives** of this study are:

1. To collect and process info's regarding tourism stakeholders and profiling tourism stakeholder types in targeted cross-border area
2. To make benchmarking analysis of stakeholders' collaboration
3. To analysis potential of stakeholders' collaboration in rural and sustainable tourism in the CBC region
4. To create easily comprehensible material and recommendations for stakeholders in tourism in the CBC region
5. Propose models and measure to positively influence the stakeholders' collaboration when adapted and implemented in the CBC region

This study aims to create clear understanding of the topic and its importance, and influence relvants stakeholders when making decisions and create strategies and plans for tourism development in the CBC region.

1.2. Methodology

The methodology used for the first part of the research consisted of an overview of scientific literature, online articles, national strategic documents and websites. Primary and secondary sources based on desk-research are applied in the Study. The research data-gathering methods: literature reviews, secondary data from different sources. Secondary data collection

relies on a vast contemporary literature, documents and projects connected to the tourism development and the role and responsibilities of different stakeholders towards tourism development and implementation in the CBC region.

2. Literature review

2.1. Stakeholders in tourism

The importance of involving diverse stakeholders in tourism planning is receiving growing recognition. Tourism stakeholders can be described as "any group or individual who can affect or is affected by tourism development in a certain region" (Byrd, 2007, p. 6). They can include local residents, private business or public authorities, who might cooperate and collaborate to develop a common "vision" for tourism (Yuksel, Bramwell and Yuksel 1999, p. 351). This has led to increasing attention being directed to the stakeholder collaboration that brings together a range of different interests in order to develop and sometimes also implement tourism policies. Stakeholder collaboration has progressively become an important aspect in tourism planning and development, as many interests, visions and perspectives might derive from the wide range of stakeholders. Jamal and Getz (1995, p. 188) described cooperation in tourism development as "collaborative tourism planning based on inter-organizational, community domain aiming to resolve problems of its planning and development". The goal of cooperation is to balance the power between all stakeholder groups, namely to redistribute power from local authorities to the community (Tosun, 2000, p. 615).

A stakeholder is identified as "any group or individual who can affect or is affected by" tourism development in an area (Freeman 1984, p 46). The co-existence of multiple stakeholders is one of the defining characteristics of a tourism destination (World Tourism Organization, 2004) and the stakeholders may include: the various levels of government (international, national, regional and local tourism organizations); tourism developers and entrepreneurs, tourism industry operators; non-tourism business practitioners and the broader community, including local community groups, indigenous people' s groups and local residents (McCool & Moisey, 2008).

It is clear that a stakeholder is thus any an agency, organization, group or individual who has either some direct or indirect interest in what an organization does, especially in the community in which the organization operates.

In the literature, we can find two type of stakeholders: primary and secondary. Local government organisations, destination marketing organisations, hotels and tourism attraction operations/convention centres are identified as primary stakeholders within a tourism destination, while community groups, incentive planners and retail outlets are identified as secondary stakeholders. Also, competitors, residents and tourists are primary stakeholders, while chamber of commerce/advisory board, media and universities are classified as secondary stakeholders.

2.2.   Collaboration among stakeholders in tourism

Managing tourism with the involvement of regional stakeholders is an extremely difficult and challenging task. Aas, Ladkin and Fletcher (2005) summarise a number of challenges such as increased costs of management processes, difficult identification of legitimate stakeholders, and the stakeholders' limited capacity to participate. In addition, tourism is an open, multi-dimensional industry with a fragmented nature. Quite a number of stakeholder groups with various interests, complex mutual relations and different willingness to co-operate on implementation of policy priorities occur in a given destination.

Stakeholder collaboration has the potential to lead to dialogue, negotiation and the building of mutually acceptable proposals about how tourism should be developed. Lack of stakeholder collaboration in the planning process has also shown to increase the level of conflicts among the interested parties thus affecting the level of tourism destination competitiveness (Yuksel, Bramwell and Yuksel, 1999, p. 351).

Tourism planning will benefit only through input from a wide range of participants including local residents, private business and public authorities, as it is extremely difficult to formulate and implement a tourism plan without the strong support and involvement of all these groups. Many researchers propose that implementation of plans for tourist destination development depends on cooperation between the destination stakeholders. In many cases this was proven. The implementation of plans which are commonly adopted for the development of tourism destination is better in those destinations where there is a higher level of cooperation

between stakeholders, which is an essential prerequisite for the overall quality of tourism destination management. In the Study we will consider several cases relevant for the CBC region in the rural and sustainable tourism, focusing especially on the planning phase.

Tourism destination can be viewed as an organisation characterised by its relationship with various groups and individuals. Tourism destination includes different actors and different companies ranging from those responsible for the construction of buildings (e.g., planners, administrative body, design, construction, ...) over the very facilities (accommodation and restaurants, shops, ...) and intermediaries (travel agencies, customs, ...) to those organizations whose main function is to help the functioning of the tourism destination (tourist boards, government bodies, institutes and departments, ...) (Geić, 2007). These actors are "pieces of a puzzle" i.e. stakeholders of tourism destination, but same kind of importance must be appointed to each stakeholder so that key stakeholders can be identified. It is important to stress that they differ from stakeholder of a firm e.g. shareholders and employees are one of the stakeholders of a firm because tourism destination is on a higher level than a single firm. The main purpose of this Study is to determine and analyse possible implementation of stakeholder approach in CBC region.

3. Tourism stakeholders in the CBC region

We consider two types of stakeholders in tourism: primary and secondary stakeholders. Primary stakeholders are stakeholders without whose continuing participation the organisation cannot survive as a going concern. Secondary stakeholders are those stakeholders who influence or affect, or are influenced of affected by the organization, but are not engaged in transaction with organisation and are not essential for its survival.

This Study emphasises the importance of co-operation between the stakeholders for achieving tourism policy priorities and gaining the benefits of tourism. The stakeholder groups are compiled based on the approach of Morrison (2013) as follows:

- National bodies: Ministry of Economy, Minsitry of Tourism and Environment, and other governmental bodies;
- Local government: self-governments of the administrative centres of the CBC region;
- Regional development centres: South-West planning region and Diber region;

- Development agencies: regional development agencies established with the aim to support regional or local development;

- Private sector tourist organisations: entrepreneurs in the travel and tourism sector active in the field of accommodation, boarding, wellness, arrangement of travel services, etc.;

- Non-profit tourist sector organisations: associations, societies and clubs having some effect on the travel and tourism sector;

- Universities: universities and high schools having study programmes focused on tourism.

3.1. Relevant stakeholders in Albania

Public institutions

The **Ministry of Tourism and Environment[1]** is a department of the Albanian Government in charge of regulation concerning the environment, the sustainable use of natural resources, promotion of renewable resources, protection of nature and biodiversity, sustainable development and management of forestry and pastures, and the quality monitoring of water resources.

Subordinate institutions of the Ministry of Tourism and Environment are:

- National Tourism Agency (AKT)
- National Coastline Agency
- National Agency of Protected Areas (AKZM)
- National Environment Agency (AKM)
- Regional Environmental Directorates
- State Inspectorate of Environment and Forestry (ISHMP)

This Ministry is specifically established, working in two big fields – tourism and environment. Four main sectors are part of the Ministry: General directorate of policy and development in Environment, General directorate of policy and development in tourism, Directorate for regulations and licensing and Directorate for Economic and support services. There are special departments focusing on marketing and promotion of tourism, conception and feasibility, policy and strategy development, and project in tourism development.

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[1] https://www.mjedisi.gov.al/

The Ministry of Agriculture and Rural Development[2] is a department of the Albanian Government in charge of regulation of the economic activity in the agricultural sector of the country with a purpose of increasing the sector's production capacity. The ministry is responsible for agriculture, rural development, food safety and consumer protection, fisheries and aquaculture, and waters administration. This Ministry is concerned of rural development, where one of the measures is rural tourism. Development actions are proposed in the "Integrated Rural Development Program - 100 Village Program".[3]

The Ministry of Culture[4] is a department of the Albanian Government responsible for the implementation of government tourism, cultural affairs, youth and sports policy. This public institution is managing with all the museums, archaeological sites, festivals, etc. In the Consultation National Strategy for Development and Integration 2015-2020[5] tourism is mentioned in relation with cultural tourism. More specifically, it is foreseen improving the standards and quality of services provided in the Archaeological Parks, National and national museums, with a view to enhancing rehabilitative interventions and increasing tourist offers; and also, improvement and enhancement of cultural and tourist products offered by parks and museums.

Other institutions, which according to Article 8 of the Tourism Law, are responsible bodies in the field of tourism in Albania are:

a) National Agency for Tourism;

b) the Advisory Committee on Tourism to the private sector;

c) Standardization Committee for Tourism Activities";

d) National Coastal Agency;

e) branches for territorial tourism;

f) the Inspectorate covering the field of tourism;

e) units of local self-government.

Responsibility for the promotional activities in Albania lies with the National Agency of Tourism, whereas the coordination responsibility falls within the mandate of the Advisory Committee on Private Sector of Tourism. The Albanian National Tourism Agency carries out

[2] https://bujqesia.gov.al/

[3] https://bujqesia.gov.al/programi-i-integruar-per-zhvillimin-rural-programi-i-100-fshatrave-2/

[4] https://kultura.gov.al/en/

[5] https://kultura.gov.al/konsultimi-strategjise-kombetare-per-zhvillim-dhe-integrim-2015-2020/

its activity in support of and implementation of the Constitution of the Law No.93 / 2015, "On Tourism", DCM no. 298, date 20.04.2016 and other legal and sub legal acts in force.

The National Tourism Agency[6], is a public entity with the status of legal, public, budgetary entity, functions as an institution under the Minister responsible for tourism. The mandate of NAT is to promote Albania as a tourist destination in the Mediterranean basin across the world. National Agency for tourism (NAT) is composed of three main departments:

1. Marketing and Images Department
2. Public and Foreign Relation Department
3. Finance and Services Department.

NAT is mainly financed by the state budget, donors, and other legal sources. NAT's budget is a separate category of the Ministry. There are no clear legal provisions on the composition of the members of NAT. The Prime Minister's proposal, along with other lower Ministers' proposals, decides the composition of the NAT. The Advisory Council on Private Sector of Tourism is a body that is directly elected by the Minister of Economic Development. The Advisory Council consists of 12 members who have been chosen from all areas of tourism, including donors, private sector, civil society and academia. This Council is tasked with boosting cooperation between the state and the private sector as well as resolving as many issues as possible through the relevant groups of interest. This Council gathers at least four times a year, but they can conduct as many meetings as necessary if there is an emergency or another need for a meeting.

With the purpose of promotion and marketing, National Tourism Organizations in Europe were established first by the most developed countries, such as France (1910), Italy (1919), and West Germany (1948). However, the first ever NTO was established in New Zealand (1901) as the Department of Tourism and Health Resorts. In South-East Europe, NTOs were established much later, starting with Croatia (1992), Serbia (1994), Albania (2015), Montenegro (2007) and North Macedonia (2012). Their web page is very visual and interactive, inviting tourist to come and visit. Tourists can find information where to go, what to do in Albania, events and tours available.

The Advisory Committee on Tourism to the private sector was extablished in 2015. It is composed of representatives from national associations that operate in the field of tourism, higher educational institutions, chamber of commerce, representatives from associations or

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[6] http://www.akt.gov.al/

NGOs operating in the field of tourism, as well as representatives from international institutions/donors. The aim of this committee is cooperation between the state and the private sector, in order to solve problems through discussions with stakeholders. The mission of the Advisory Committee on Tourism to the private sector is to advice and give its recommendations on important issues in the field of tourism, on the priority policies of tourism, strategies and plans of tourism development, legislation, standards, certification and licensing.

The National Environment Agency[7] is a government agency in Albania under the supervision of the Ministry of Tourism and Environment. Before 2014 the agency was known as The Environment and Forestry Agency. AKM is dedicated to improving, conserving and promoting the country's environment and striving for environmentally sustainable development with sound, efficient resource management. The National Environment Agency is a central public institution under the authority of the Minister, who exercises its jurisdiction throughout the territory of the Republic of Albania, through the KTA headquarters and regional branches in the regions, which are the Regional Environmental Directorates. In support of the Prime Minister's Order No.55 dated 13.02.2014, the structure and the organization of the National Environmental Agency and the Regional Environmental Directorates, which are subordinate to the KTA, have been approved.

The **National Coastline Agency (AKB)**[8] is an institution of the Albanian Government responsible for monitoring the implementation of policies and regulations that promote sustainable tourism developments along the coastal region of the country. The Agency is organized at central level by the General Directorate and has four regional branches. Its main objective is to create a system of rules and standards which enable the proper administration of public spaces along the beaches and rural areas of the coast.

The **National Agency of Protected Areas**[9] is a government agency in Albania. Its main duties are focused on the management, protection, development, expansion and operation of the protected areas in the country, which today account for about 16% of the territory of Albania. AKZM was established on February 4, 2015 and took many of the functions and duties of former Forestry Police, which was abolished. The agency is under the authority of the Minister

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[7] http://www.akm.gov.al/
[8] http://www.bregdeti.gov.al/
[9] http://akzm.gov.al/

of Tourism and Environment. It specializes in defending Albanian agroforestry heritage, safeguarding the environment and landscape. It complied with the fulfilment of security services as well as the control of the territory, with particular reference to rural and mountainous areas. The AKZM have as primary role to safeguarding the wooded areas, but also have other numerous and varied institutional tasks, which is part of a wider context of protection of the environment and the territory, human health, animal protection, flora and landscaping, conservation biodiversity. It is also charged to protect the Albanian National Parks; marine protected areas and protected areas.

This institution is especially important for natural, mountain and rural tourism, and stakeholders who are active in these types of tourism. One ongoing project, managed and promoted by this institution is "Smile Albania" - Protect the Environment, Promote Tourism.[10]

Public institutions in Mat, Diber, Bulqize and Klos

Professional bodies/Associations in Tourism

National Association of Tourist Guides of Albania - NATGA[11] Founded February 2006, by the first group trained in Cyprus International Training Center of WFTGA, with the support of USAID project in Albania (EDEM). The National Albanian Tourist Guide Association (NATGA) is the voice of professional tourist guides who consider themselves as ambassadors of Albania. NATGA upholds and promotes international standards of tourist guiding skills and is a member of the WFTGA and FEG. Project that is ongoing in the CBC region, is Diber: Trails and Tradition[12], implemented by Albanian Local Capacity Development Foundation. During this project, Diber puts its inaugural class of tour guides through intensive training.

Albanian Tourism Association (ATA)[13] was established in April 2008 as an umbrella association dealing with the shortcomings of a competent and comprehensive representation of the private sector of tourism. ATA's mission is to function as a competent, professional association so as to serve as the united voice of the tourism industry, thus ensuring favorable framework conditions and offering services that guide these businesses to a high-quality

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[10] http://akzm.gov.al/smilealbania
[11] http://www.natga.al/?fbclid=IwAR3KhF9dz9P9q4_Ar6AMfsJW6OwsC9Akbxgoe8dlW_MLWB5PNj5JlJbPddY
[12] https://www.usaid.gov/albania/news-information/fact-sheets/fact-sheet-diber-trails-and-traditions
[13] http://ata.org.al/

product, tourism services, and effective business management by a well-trained staff and increasing income. The mission strives to enable optimal conditions for the Albanian tourism industry and to increase the competitiveness of Albanian tourism on the international market. As a professional association and representative of the tourism industry, ATA urges all the industry players to join their forces to foster an institution in which all of us, contribute professionally and become the main participants in the decision-making process, that will impact the future of our industry.

The implemented ATA concept as an umbrella association was based on 400 interviews with SMEs from the tourism sector such as hotels, restaurants, transportation companies, agents, etc. Based on these interviews, needs of the tourism sector were identified as well as competences and structures required to meet these needs and challenges.

Ever since through ATA the private sector has taken an active role in the further development of the Albanian tourism industry. In order to meet the prerequisite, which can be derived from the ATA vision, mission and objectives, the general assembly in April 2008 decided to establish a pillar-sector concept. ATA membership is structured according to sectors and regions. Today ATA is a competent partner for the public sector in the tourism development, monitors and contributes to this development, increases public and administration awareness of tourism and advocates in the interest of the tourism industry.

Association for Development of Cultural Tourism[14] – ADCT - established on December 2009 according to the Albanian law for non-profit organizations, as a professional organization focused in development of the cultural tourism and tourism in general, through the preservation and promotion of the cultural and natural heritage. ADCT is managed by the Council Board composed by three members. The role of the Board is to design and to adopt the ADCT long-term governing policies and strategies, to lobby to the international and national institutions and to provide funds for the Association. ADCT currently has a full-time employee, and involved external experts in various projects and activities. Also ADCT has a group of 10 volunteers who are students Cultural Heritage, Archaeology and Tourism from several public and private universities in Albania. The Vision of ADCT is to create a new vision for the development of cultural tourism and to create premises for a sustainable tourism in Albania, region and abroad through education, intercultural communication, cultural-tourism activities

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[14] https://www.annalindhfoundation.org/members/association-development-cultural-tourism-adct

and cooperation between all stakeholders. ADCT has cooperation with many national and international organizations that operate in the field of tourism and cultural heritage.

Businesses in tourism

Different type of businesses are present in tourism sector, offered variety of tourism services and products. One example in Albania is the company Albanian Tourist.[15] The goal of Albanian Tourist is to create an enjoyable travel environment for the emerging nation of Albania. Albania is a "young tourism country" and creating a high quality tourism structure for Albania is the goal of the company. Also the staff of Albanian Tourist would like the world to take a fresh look at Albania and explore it's unique culture, foods, mountains, beaches, and customs. They additionally seek to be the highest quality and respected tourism service provider in Albania. They offer tourist tours, advices, and trip planning activities.

Another good example is Albania Holidays[16] a leading Destination Management Company who is helping tourists in discovering an unknown but fascinating country. Albania has much to offer: a sunny Mediterranean climate, delicious food, kind and welcoming people, a laid back attitude, a rich history, an old culture, unique traditions, beautiful landscapes with mountains, rivers and a magnificent coastline. Visitors to the country describe Albanians as warm and inquisitive, happy to see foreigners. Albania Holidays can assist tourists to discover the country in the most authentic way by offering tailor made solutions for groups & FIT-s, with a focus on the local elements: history, culture, traditions and way of life. We provide professional arrangements for: tours, events, venue selection, team building activities, shore excursions for cruises and more.

Non-government organisations

Albania's tourism associations are key institutions in the development of the tourism industry. Albanian Tourism Agency Association (ATAA), Albanian Tourism Operators Union (ATOU), Albanian Hotel Association and other tourism related NGOs provide services of value to their members and provide legitimate voices for the sector in discussions with government. Priorities for future efforts identified by association include: relationship with the Government, collaboration in attracting foreign tourists and training management and staff.

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[15] http://www.albaniantourist.com/about_us_albanian_tourist.html
[16] https://www.albania-holidays.com/

3.2.   Relevant stakeholders in North Macedonia

There are five key stakeholders of tourism on a national level in North Macedonia. Some of them are state institution such as Ministry of Economy (tourism department) and Agency for Promotion and Support of Tourism. The other stakeholders of tourism are non-government organization such as HOTAM, ATAM, Economic Chamber for Tourism, Macedonian Chamber of Tourism, Economic Chamber of North-West Macedonia and Catering Industry and Tourism Association.

Ministry of Economy (tourism department)

The tourism department within the Ministry of Economy is currently responsible for the tourism policy/strategic planning and licensing, research, categorization and cooperation. Until the establishment of the Agency for Promotion and support of tourism, the Ministry of economy through the Tourism department was in charge for preparation and implementation of the Program for general tourism advertising. In North Macedonia, there are two departments dealing with tourism within the Ministry of Economy: Tourism Department and the Agency for Promotion and Support of Tourism. Both of these two departments have two subunits that deal with research analysis and classification, the Unit for international cooperation, the Unit for Promotion and the Unit for Research. North Macedonia invests around 2 million euros for promotion and marketing, and another 100,000 EUR for funding the institutional operations of the Ministry.

Agency for Promotion and Support of Tourism

The Agency for Promotion and Support of Tourism was founded in 2008 by the law on establishing an agency for promotion and support of tourism.[17] Agency for Promotion and Support of Tourism is a government organization whose primary function is the promotion of Macedonian tourism resources and facilities abroad. The main purpose of the existence of the Agency for promotion and support of tourism of North Macedonia is to encourage and improve the tourist offer of North Macedonia. Agency is working on promotion of the whole tourism

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[17] *Law on Establishment of the Agency for Promotion and Support of Tourism in the Republic of Macedonia (Official Gazette of the Republic of Macedonia No. 103/2008; 156/2010; 59/2012; 187/2013 and 41/2014)*

industry around the world with the main goal to make the country recognizable tourist destination, easy to find on the world map by its quality tourism offer.

Professional bodies

HOTAM is a voluntary association of hotel and catering businesses in North Macedonia. It is a non profit and non government organization, however members are required to pay a small annual fee. All collected funds are used to cover the expenses, to promote and protect the members. Currently the association has 67 members –50 hotels (the majority of them at Lake Ohrid), 3 camping sites, 2 private accommodation facilities, 3 tourism education institutes, 6 restaurants and 3 tour operators. Its main objective is supporting, promoting and developing the Macedonian hospitality industry.

ATAM is the Association of Travel Agencies of North Macedonia – the majority of the members are outgoing agencies.

The Economic Chamber for Tourism (ECTM) was established on April 16, 2008, as the sixth chamber within the Association of Chambers of Commerce. Now, it has around 200 members –from travel agencies to transportation companies and accommodation facilities and restaurants. The members are divided into three categories: premium, regular and associate. The main goal of ECTM is to improve the business environment in the tourism industry and to create favorable conditions for its members. It is financed by voluntary membership fees.

The Macedonian Chamber of Tourism (TKM) is a non-profit organization. It unites on voluntary basis national, regional and local organizations and councils, companies from tourist-catering business, tour operators and travel agencies, professionals, companies and organizations related to the tourism industry. TKM was established in March 2008 as the first non-governmental trade tourism organization in North Macedonia. TKM performs the functions in order to coordinate, organize and manage the joint activities in North Macedonia in the tourism industry.

The Economic Chamber of North-West N. Macedonia (ECNWM), as a legitimate representative of the interests of the business community, aims to organize, advocate, promote and protect businesses both within North Macedonia and abroad, facing the challenges of competition at different levels, either on a domestic or international basis. Based on professionalism, high standards of work, determination, flexibility, transparency, consistency

and equal access, ECNWM significantly and reliably helps in promoting businesses and society in accordance with European values.

Catering Industry and Tourism Association is an independent and non-profit professional organization. Twelve representatives of the tourism and hospitality sector of North Macedonia are members of the Managing board of the Catering Industry and Tourism Association. This association operates within the Economic Chamber of North Macedonia.

Municipalities of Ohrid, Struga, Debar, Vevcani, Centar Zupa, Mavrovo-Rostuse

4. Collaboration among stakeholders in the CBC region

4.1. Benchmarking analysis of stakeholders collaboration in tourism planning in CBC region

The importance of involving diverse stakeholders in tourism planning is receiving growing recognition. Effective tourism destination planning is a complex process, due to the existence of a wide variety of stakeholders with a wide range of opinions, multiple problem visions and different interests. Despite the complexity of the planning process one feature acknowledged for successful destination management planning is a high level of stakeholder engagement and cooperation. The implementation and success of a tourism plan often relies on the support of destination stakeholders. It is becoming widely recognized that success of tourist destinations requires planning. While collaborative planning may be time consuming and difficult (Bramwell and Lane, 2000, p. 9), it is justified as it can potentially lead to avoiding the costs of resolving conflicts in the long term, it is politically legitimate, and it can be based on knowledge and capacities of stakeholders (Yuksel, Bramwell and Yuksel, 1999, p. 351). Despite the complexity of the planning process one factor acknowledged for successful destination management planning is a high level of stakeholder engagement, especially of local community (Tosun and Timothy2003; Tosun, 2006). The implementation and success of a tourism destination plan often relies on the support of stakeholders in the community (Byrd, 2007; Timur and Getz, 2008).

Who should be involved in the tourism development process? Four distinct groups are identified: the present visitors, future visitors, present host community, and future host community. The host community can be further divided into residents, business owners, and government officials. The management view of the stakeholder theory indicates that all stakeholder groups should be involved in the entire tourism development process.

It is commonly recognized that there is a big gap between the planning for sustainable tourism and its actual implementation. Many tourism development plans never turn into reality due to, amongst other things, a lack of information to support planning, and a lack of effective instruments to enable implementation (Briassoulis, 2002). It also means that understanding why the gap exists between ideology and practice is a critical step on the way to transforming the concept of sustainable tourism into the daily practice of the tourism industry in CBC region.

The key reason for the growing interest in stakeholder collaboration/cooperation in tourism development is the belief that tourist destination and organisations may be able to gain competitive advantage by bringing together the knowledge, expertise, capital and other resources of several stakeholders (Bramwell, Lane 2000). Collaborative planning according to Gray (1989; Bramwell, Lane, 2000, p. 273) is defined as "a collective process of resolving conflicts and advancing shared visions involving diverse stakeholders". According to Jamal and Getz (1995, p. 188) in a tourism context, collaborative planning is a process that involves joint decision making among autonomous, key stakeholders in order to resolve planning problems or to manage issues related to the tourism planning and development.

In the following tables results from desk research and analysis of relevant documents in Albania and North Macedonia is presented, emphasizing the parts where stakeholders' collaboration is mentioned. Several type of documents have been included in this analysis, such as strategies for tourism, development, having in mind aspects as rural tourism, biodiversity, culture, etc.[18]

A description of the national management structure of the tourism industry is important as it serves to illustrate the nature of government policy and the decision-making process which regulates the operation of the tourism industry. The tourism management system in Albania ranges from the national to the local level. At the national level, tourism activities fall under the jurisdiction of the Ministry of Urban Development and Tourism. At this level, there are some directories operating as an integral part of the Ministry structure: the general directory of tourism development, directory of politics and tourism planning, directory of marketing and tourist promotion. Albanian National Tourism Organization is a governmental organization too under the Ministry of Urban Development and Tourism. At the local level, each municipality has a Department of Tourism which exercises administration over tourism operations. This description of the management structure of Albanian's tourism industry clearly indicates the top-down nature of tourism planning. The strategies for the tourism development in national level are: National Strategy of Tourism (2003), National Strategy of Tourism (2006), Sectorial Strategy of Tourism (2007- 2013), Guidance for the sustainable development of Tourism in Albania.

Table 1. Analysis of relevant documents in Albania

Type of document	Mentioning of "stakeholder" and "collaboration"

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[18] Special section are selected and presented in bold letter in blue color.

National Strategy For Sustainable Development of Tourism 2018 - 2022[19]	Sustainable tourism development is a shared responsibility of a considerable number of stakeholders, including state institutions (central and local), tourism enterprises, civil society organizations, educational institutions, media and citizens. Critical role in achieving this objective play international institutions to channel development assistance funds in Albania. **This strategic document aims to strengthen integrated spirit by bringing together a number of stakeholders to the** **objectives and implementation of the action plan.** Tourism development will be **based on the approach of cooperation.** The key to having a successful tourism product and is sustainable cooperation and involvement in the development of tourism of all stakeholders. - The level of involvement of the local population and local government, interest groups and local businesses is essential to ensure a successful process of planning and development at the destination. - At the national level, cooperation between administration (Ministry), tourist organizations and associations and experts improves the decision-making process. - At the business level, cooperation between "competitors" can improve supply quality and therefore competitiveness, for example, in the international market. - Cooperation with local government units is necessary to support tourism development at local and regional level. Part of the planned activities in the Strategy are: - Development of joint activities for the integration of different **stakeholders** (national, local, private businesses) in tourism marketing process. **Strategic Direction**: Increasing public investment Sustainable tourism development is the shared responsibility of a considerable number of state institutions at the central level as well as national. This strategic document **aims to strengthen integrated spirit by bringing together a number of stakeholders in achieving objectives**. The strategy requires that public investment planning in line ministries to take into account the objective of tourism, guiding investments in areas with tourism potential, namely in areas with rapid return on investment skills. Applying a comprehensive approach to the management and development of tourism, providing impact space and action for all stakeholders. One of the alternative approaches to tourism management is the establishment of management units (destination management organizations) **public - private partnership structure**. Without prejudice to the final form strategic document suggests **a consultation cycle between all stakeholders** to discuss the most appropriate model to organizations that will be established with the purpose of effective management of tourist destinations.

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[19] https://mjedisi.gov.al/strategjia-e-turizmit/

National Strategy for Development and Integration 2015-2020[20]	The Strategy lists the main challenges the sector faces, including the implementation of standards, the quality of tourism services and facilities, the development of tourism products, **the lack of co-operation and effective coordination between actors that are or could be an integral part of the tourism industry**. Among the specific challenges include: (1) the need for greater integration of tourism planning and tourist destinations; (2) Address weaknesses related to the range and quality of tourism products; (3) developing a more favorable legal and institutional environment for the absorption of domestic and foreign private investors; (4) **the need for a more comprehensive and strategic approach to tourism development in Albania**, ensuring sustainability and providing income and employment opportunities.
Strategies for biodiversity protection[21]	The recreational values that bring biodiversity and landscape diversity are a resource that can be used to foster tourism development. This is the duty and responsibility for the protection and development of these values for present and future generations. If we are not able and responsible for the protection of biological and natural diversity, there is a risk of losing their values, which help tourism as a means of promoting development in Albania. Hunting, fishing, mountaineering and other activities that are attractive to tourism require that Albania take the necessary measures to protect its environment and biodiversity. In recent years, the development of the concept of eco-tourism is an important and important aspect which creates the possibility of economic benefits. Albania is under threat due to inadequate practice and development related to mass tourism. With the current model of quantity-based development, the anticipated growth of tourism development in the region will continue to harm the landscape, will affect soil erosion by exerting pressure on endangered species. At the same time, the straining or over-utilization of the available water resources, the increase in the amount of waste and the discharge of pollution into the sea, among others, is also a cultural disruption. Building related to the development of tourism has also caused great damage also in fragile coastal and marine ecosystems in the country. Given the growing number of visitors, it is clear that the impact of land and landscape tourism is huge.

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[20] https://mjedisi.gov.al/strategjite-e-sekt-nderl/
[21] https://mjedisi.gov.al/strategjite-e-sekt-nderl/

Cross-cutting Strategy for Rural and Agricultural Development 2014-2020[22]	The document establishes the basis of an integrated planning and aims at the development of rural tourism and other tourism-related activities, such as cultural tourism, natural and mountain tourism, wine tourism, etc., reconstructing traditional buildings and houses for business purposes, such as accommodation, food, leisure, trade, etc. According to the strategy, achieving the aforementioned goals will be made possible through the promotion and marketing of the country's tourism image as a tourist destination of particular interest; diversifying the tourism product by expanding across the territory to ensure integrated tourism development; development of certification and standardization systems in tourism in order to contribute to the improved quality of services and products in the sector. **The Strategy considers the Urban-Rural Partnership as an integrated approach to achieving balanced development**. Urban agriculture development includes; the development of urban agriculture in areas with moderate urbanization and localized generally on the periphery of residential areas and will be one of the future policies. Agrotourism will be one of the tools not only of tourism promotion, economic development, but also of increasing the sustainability of tourism and the preservation and promotion of local and cultural identity.

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[22] https://mjedisi.gov.al/strategjite-e-sekt-nderl/

A Cultural Strategy for Albania[23]	The Albanian Ministry of Culture is working on the development of a cultural strategy with a view to guide policy actions in the years to come, to justify requests for additional budgetary resources as well as to encourage private investment in the arts and culture. The strategy also serves to consult with stakeholders in culture policy whether in the **public or private sector to develop a much needed spirit of collaboration and shared understanding** on the role of culture that will serve to build a modern Albania that is inclusive, prosperous and forward looking.

Raising awareness on the economic and social value of cultural investment - Historically there is a lack of trust in public administration thus requiring a careful and consistent approach in developing and implementing policies associating stakeholders and citizens. It is important to associate citizens on heritage development and management with a view to galvanise local support.

In the preparation of the Strategy different stakeholders were included - A workshop was organised by the Ministry of Culture on 9 February 2018 with local stakeholders to discuss initial findings (SWOT analysis) required to justify the proposed policy strategy.

Recommendation for further development and implementation of the Strategy **- to set up a process of continuous consultation and collaboration with stakeholders including local authorities**. This is crucial with a view to build a consensus on the strategy as well as to ensure its implementation in the years to come independently of political changes.

Action planned: **Set up an advisory group composed of CS stakeholders to monitor implementation of the cultural strategy**.

The communication strategy should serve to raise awareness on the economic and social significance of the cultural investment as well as the objective of developing a collaborative mindset between the CS on the one hand and the business, technology and universities on the other hand. It will also serve to build trust with stakeholders, citizens and other policy departments. It is important to give visibility to the sector's contribution to local economic and social development. Finally, it will contribute to improve Albania's image and attractiveness. |

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[23] https://rm.coe.int/a-cultural-strategy-for-albania-implanting-the-cultural-bug/1680794665

Tourism Development Plan in the Diber Region[24]	An essential element of ALCDF (the Foundation for Local Capacity Development) is empowering experience of service users, increasing the confidence of all rural stakeholders to participate in an open and competitive market environments. ALCDF has two main functions: - Mediation, which means the relationship between people to make market information more transparent and accessible. - The subsidy to finance the initiatives of local actors, such as the testing of innovations and promoting them. The mechanisms that support local efforts to bring to market cultural and natural products. The first step in this process is to identify a need for the tourism sector of the sectors of local government and civil society in each region. The second step is to develop a support plan assist local actors in whatever way resources permit. Small business development; mechanism through which visitors contribute to the local and national economy, numerous training should be organized, as well as the rise of tourism stakeholders, encouraged and supported by the local government in order to develop this mechanism. Created with the support of local authorities to focus on promoting and marketing of regional tourism and support the transmission of information. **Creating connections with all tourism stakeholders at national and international level**. **Inter-regional through closer cooperation** between the local unit, Dibra District, as well as other stakeholders. Units for inter-regional long-term priorities should be formed.

[24] http://www.dibra.gov.al/

Municipality of Burrel - Strategy of Sustainable Development 2012-2030[25]	The Strategy plan represents a major effort to bring about a major change in the way governance and quality in the decision making process and cooperation between public and private actors. It has already laid the foundation for functional partnerships and has sparked a civic pride to residents. Enough knowledge of the contributions from the community, municipal and governmental and non-governmental agencies are heard and considered in the process of drafting the plan, which has provided the necessary community ownership and local decision-makers and their commitment to the implementation, monitoring and institutionalized updating and transparent Plan. It draws and guides the municipality and community in the consolidation of a communication platform of debate and cooperation between stakeholders in the development of open and inclusive municipality.
	The Strategic plan highlights the vision and strategic goals that our community for its development, and guides consolidating municipal and community efforts to develop a supportive and favorable environment for EU integration, community development, regional development and business. Municipality and stakeholders in the process, aimed through the plan and approach of its preparation, may:
	- provide a guiding document for determination of future directions of economic growth for the community and local government,
	- create an example of a **strategic decision process that incorporates collaboration among local politicians and the business community**,
	- efforts to facilitate cooperation between public and private partners for a coordinated development of the municipality,
	- establish a framework for decision-making on important issues such as the environment and public services, urban planning and infrastructure cooperation with business,
	- create a new experience and establishing a culture of economic development planning.

Analysis of Macedonian documents in tourism

Table 2. Analysis of relevant documents in North Macedonia

| *National Tourism Strategy Draft by Kohl & Partner[26]* | Consumers are seeking advice from other consumers through the internet. Skilled consumers are increasingly likely to know more about niche products than many travel professionals. There will also be growing investment in internet strategies for promotion and in new research techniques.

Additionally public / private partnerships are becoming more important in tourism marketing as governments seek to increase both **stakeholder involvement** and marketing budgets.

There are five key stakeholders of tourism on a national level in North Macedonia:
• **Ministry of Economy** (tourism department)
• **HOTAM** (voluntary association of hotel and catering businesses in North Macedonia).
• **ATAM** (Association of Travel Agencies of North Macedonia the majority of the members are outgoing agencies).
• **Agency for Promotion and Support of Tourism**
• **Economic Chamber for Tourism**

At the same time strategic tourism development plans are often missing or weakly prepared on a local level. Additionally, several donors are financing tourism-related activities on a local level (planning and/or implementation) but those activities can be relatively uncoordinated and **often important stakeholders are not aware of the projects and its content.**

In order to improve the tourism know-how and service quality in North Macedonia six measures are recommended in the Strategy and one of them is:

Annual tourism conference
An annual tourism conference, with changing topics and organized by the government would be another possibility to enable **know-how transfer among Macedonian tourism stakeholders.** |

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[26] economy.gov.mk

National Strategy for rural tourism 2012-2017[27]	This study uses an approach of involving **all stakeholders** in analyzing the potential for sustainable development of the regions. Investments as one of the main drivers of regional development are addressed through key determinants of investment success: access to finance, human resources and locations for potential investments that have physical resources that are appropriate for the development of Rural Tourism. The study describes that for more serious branch development, integrated activities are needed from all stakeholders, rural residents, potential investors and local, regional and national authorities in order to provide conditions for the competitiveness of Macedonian rural tourism. The analysis of the situation in the Republic of North Macedonia is focused on the following strategic areas: • Legal framework and administrative capacities • Accommodation and catering facilities • Human resources • Creation of products in rural tourism and their promotion One of the recommendations of the studies is to increase the accommodation capacity **through coordinated investments of the stakeholders.** **Specific objective 1.1** - Save the authenticity and identity of territorial characteristic of geographic destination with selection of thematic elements that will be integrated in the buildings and reconstruction of facilities. **Specific objective 1.2** – Enabling infrastructure prerequisites for investments in rural tourism **Specific objective 1.3** – Enabling coordinated construction of authentic objects by individual business entities and other stakeholders. Projects should be carried out by the planning centers for each region individually, **in cooperation with the local population**, who only recognizes and nurtures the unique regional characteristics. The regional approach through the **cooperation of the local institutions** will contribute to the Unification and quality of the tourist services, as well as the recognition of the tourist products for a particular region.

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[27] http://tourismmacedonia.gov.mk/wp-content/uploads/2018/08/NAcionalna-strategija-za-ruralen-turizam.pdf

Program for Tourist development for 2019[28]	The following activities are planned according to the Program for Tourism development for 2019: 1. **International and bilateral cooperation in tourism** Increased and intensified cooperation in the field of international communication with large and important tourist organizations and institutions that contribute to the development of tourism such as the World Tourism Organization, European Travel Commission, Central European Initiative, etc., participation in fairs, as well as bilateral cooperation in the area of tourism (signing of agreements, regional conferences meetings, etc.), as well as payment of membership fees for the World Tourism Organization. 2. **Education and trainings in tourism and catering** The Ministry organizes trainings by engaging all relevant institutions, faculties, international organizations as well as representatives from the private sector. The Ministry of Economy plans to organize this activity together with the tourism faculties in the Republic of North Macedonia, the chambers of commerce, while the entire project will be under the auspices of the World Tourism Organization. 3. **ECO ACTION and Campaign for cleaning of waste leading to tourism** Prior to the start of the tourist season The Ministry of Economy will foresee activities for cleaning the waste from roads leading to tourist centers (regional, national and local roads) as well as the distribution of promotional material for the importance of the environment. This will be done in cooperation with the private sector, non-governmental organizations, tourism associations and tourism faculties. 4. **Organizing an International Tourism Conference** International conferences are one of the main tools for improving the tourist climate, by organizing such conferences there can be joint approach in improving the tourist offer in North Macedonia. Ministry of Economy, in cooperation with the Faculties of Tourism, Tourism chambers and associations as well as the private sector will engage in the organization of the conference on improvement of tourism climate and infrastructure.

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[28] http://www.economy.gov.mk/doc/2591

National Strategy for Development of Health Tourism 2012-2018[29]	Development of successful health tourism requires joint development and cooperation between the health and tourism sector. The PEST analysis of the factors that can influence the development of the health tourism in the North Macedonia done in this document pointed out the need for **permanent cooperation** with renowned university centers around the world. According to the Strategy, the Institutional Support to the Development of Health Tourism should include: Participation in the development of strategies, programs and action plans for development of health tourism in cooperation with ALMP and other relevant stakeholders. The ALPT is tasked with providing support and promotion of tourism in general and thus of health tourism. To this end, the activities of the ALMP are targeted at several segments: Development of strategies, programs and action plans for health development tourism in cooperation with the Ministry of Health and other relevant entities.
Substrategy for Development of Sport tourism with action plan 2015 - 2018[30]	The obstacles and problems that need to be overcomed are of a different nature in the field of sports tourism. According to the frequency we systematized them to: financial nature, weak initiative, co-operability and logistics. Of particular importance is the indication of the necessity of introducing standards of professionalism between stakeholders. The idea of **forming a cluster of all stakeholders** in sports tourism in its functioning is mostly determined as an excellent idea that leads to the conclusion that there is a willingness to approach in this kind of organizational form approaches with greater enthusiasm. The communication between the stakeholders of this space is **not at the highest level and needs to be improved.** The developmental principles of sports tourism are: • **Partnership between all stakeholders in the field of sports and tourism**; • Balanced territorial development of the Republic of North Macedonia through the improvement of the sports and tourism infrastructure, a selective approach in the development of tourism by introducing authenticity and creativity in the specific tourist offer, preserving and promoting the protected spaces and units and putting into function of sports activities; • Improving and diversifying the catering offer in the field of specialized services related to sports and tourism activities; • Improving the quality of the services in the offer through the application of the latest norms and standards **At the moment, according to this Document, the involvement of stakeholders in the creation of tourism products from sports tourism is minimal.**

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[29] http://tourismmacedonia.gov.mk/wp-content/uploads/2018/08/Nacionalna-strategija-za-zdravstven-turizam.pdf

[30] http://tourismmacedonia.gov.mk/wp-content/uploads/2018/08/FINALNA-STRATEGIJA-ZA-SPORTSKI-TURIZAM.pdf

Sub-strategy for Traditions and Events of NM, 2014[31]	Participation of stakeholders in the creation and implementation of the event. The events have the potential to strengthen their **co-operation and interconnectivity, which are, in fact, key support for encouraging the development of tourism in municipalities or local communities**. The result of this concept of horizontal and vertical co-ordination is tourism development by preserving the authenticity and at the same time satisfying the needs of both the domicile population and the tourists, which is the basis for the sustainable development of the community. The stakeholders that should be involved are: Business sector, Local government and Organizing Committee.

Tourism outcomes in North Macedonia refer to the need of government support and encouragement in the line of accomplishing positive impacts with larger extends. Yet, the state intervention should be based on balanced background regardless the applied forms. So it is irrelevant whether the state interferes directly through the Ministry of economy, or indirectly by the foreign policy. The main aim is to implement different measures and instruments in order to manage tourism flows in the line of fulfilling the projected goals. The general conclusion is that Macedonian tourism suffers from lack of coordinated activities and organizational forms functioning on horizontal and vertical line, unclear set of goals, aims and field of interest within the public, as well as the private tourism sector.

In both tables it can be seen that the term "stakeholder collaboration" is mentioned in several documents. Some of the phrases used in the analysed documents are:

- Permanent cooperation
- Involvement
- Co-operation and interconnectivity
- Partnership between all stakeholders
- Communication between the stakeholders of this space is not at the highest level and needs to be improved
- Co-operability and logistics
- Development of strategies, programs and action plans for development of health tourism in cooperation with ALMP and other relevant stakeholders
- Coordinated investments of the stakeholders
- Integrated activities are needed from all stakeholders
- Approach of involving all stakeholders

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[31] http://tourismmacedonia.gov.mk/wp-content/uploads/2018/08/Potstrategija-za-tradicii-i-nastani.pdf

- Know-how transfer among tourism stakeholders
- Strategic decision process that incorporates collaboration among local politicians and the business community
- Creating connections with all tourism stakeholders at national and international level
- Inter-regional through closer cooperation
- To set up a process of continuous consultation and collaboration with stakeholders including local authorities
- The Strategy considers the Urban-Rural Partnership as an integrated approach to achieving balanced development
- The public or private sector to develop a **much needed spirit of collaboration and shared understanding**.

In these documents the importance of cooperation among all stakeholders is recognized, as well as already existing problems, and past mistakes of not including all stakeholders in the process of planning, and implementing tourism strategies and plans, in both countries North Macedonia and Albania.

4.2. Benchmarking analysis of stakeholders' collaboration in tourism implementation in CBC region

Poor cooperation among the stakeholders is emphasized as a limitation for implementation of tourism development plans. This is expected, given realization of these kinds of plans requires the cooperation of all stakeholders, not just those that are directly related to the development of tourism, as well as comprehensive and long-term consideration of future tourism development.

For individual success in tourism, cooperation among different stakeholders is necessary. There are a number of benefits and risks for every stakeholder in tourism, as well as certain tradeoffs. Currently there is a lack of communication and synergy among different stakeholders in the development process of both Macedonian and Albanian tourism. Planning and management of tourism has been rather centralised in a way which can contribute to achieving pre-determined governments' objectives. Although the process of decentralisation of government functions (including planning) has recently started, so far, it has resulted in lots of misinterpretations and misuse at the local level. Moreover, the struggle between different

exogenous interest groups and locals over control of resources has often been ignored by both local and central governments. Thus, we have the situation that in CBC region tourist destinations where local population is not empowered in a real sense, involvement is restricted to elites in the community, resulting in consideration of their interests rather than the interests of the community itself.

Further researches should be conducted related to the finding and defining possible models for establishment of functional destination management organisations in CBC region. The existence of tourism community systems should be considered as an existing supporting infrastructure, but also their inadequacy for fulfilment of the tasks set before the organisation of a DMO. Furthermore, possibilities for development of public and private, and private and private, partnerships within the framework of the destination management model should be researched, with particular emphasis on involvement of the widest local public and local interest groups, as an equal participant in the process of tourism destination management.

Although the plans are a presumption of a system-coordinated development, they are effective only when they get implemented. According to opinions of the tourism organizations directors, marketing and promotional activities plans are better implemented than those for tourism development. There are some limitations for implementing tourism development plans, noted in relevant literature sources:

- lack of financial resources,
- human resources limitations,
- lack of product development strategy,
- insufficient knowledge on market trends, and
- poor cooperation among stakeholders.

As explained previously, this first step in the tourism planning is crucial for the implementation phase. It can be expected positive impact and involvement of stakeholders in the implementation of the tourism action plans, based on the notion that they participated in it development.

4.3. Challenges in stakeholders' collaboration in the CBC region

Challenges in stakeholders' collaboration are directly influencing the implementation process of the developed strategies and plans for tourism in the CBC region. There are several

challenges, which can become risks if not managed properly. Here is a list of the current challenges and some comments concerning them:

- Changing very often the strategies without fulfilling the objective of the previous one (this is the case of Albania and North Macedonia. More, the strategy of North Macedonia is still considered a draft, proposed version, not officially adopted);

- When crucial strategic documents are being developed, foreign experts or international companies are in charge of the drafting version. Still, it should be noted, that not always they have the real "feeling" and understanding of the circumstances of the country/region, when conceptualizing the document. And, on the other hand, not including properly, or only artificially, other relevant stakeholders pose one of the greatest challenge in tourism sector;

- Lack of funds invested in tourism, and more specifically not at all funds allocated to contribute to collaboration of stakeholders is another great challenge in the CBC region;

- Lack of proper education, and being in touch with world trends and industry requirements is also a challenge for the stakeholders in the CBC region. Lack of appropriate training on a quality service cannot establish a relation marketing meaning a tourist destination loyalty;

- In the strategies for tourism development stakeholders and their collaboration is mentioned. However, it was not laid down practically how can cooperate all small enterprises operating in the tourism industry to develop successful tourism;

- If all stakeholders cooperate, they can build a detailed CBC branding and image management strategy based on visual and national identity;

- Centralization of decision making in governmental power structures often creates a barrier for the cooperation with the private sector;

- Sustainable tourism development is mentioned in the strategies but only in theory. No concrete steps are foreseen such as, meetings, conferences, studies that should enrich this field which at the same time is a sure economic development in long-term and a very important issue for the preservation of the identity of a country;

- Specializing in type of tourism appropriate for CBC region and jointly develop tourism products is still a challenge, but can be also considered a great possibility for stakeholders in Albania and North Macedonia.

For CBC region one very attractive solution resides in establish a long-term strategy for the development of sustainable tourism, involving all the stakeholders and planning concrete steps to finally achieve a good position as a tourism destination.

5. Conclusion and recommendations

Further researches should be conducted related to the finding and defining possible models for establishment of functional destination management organisations in CBC region. The existence of tourism community systems should be considered as an existing supporting infrastructure, but also their inadequacy for fulfilment of the tasks set before the organisation of a DMO. Furthermore, possibilities for development of public and private, and private and private, partnerships within the framework of the destination management model should be researched, with particular emphasis on involvement of the widest local public and local interest groups, as an equal participant in the process of tourism destination management.

Although all the governments in CBC region stress the importance of collaboration with regional stakeholders in the tourism development plans, we can see significant differences in this effort in particular regions. The level of collaboration is dependent not only on the existence of regional and local DMOs (if there are any) and their support by the government; it is also influenced by the importance of tourism for the regional economy and the existence of "strong stakeholders" willing to cooperate and participate in tourism development.

Plans are an important instrument for managing tourism development, as they are prerequisite for systemic and coordinated development. However, they become effective only after implementation. In the CBC region there are still destinations that do not have development plans, and thus their development is left to "uncontrolled" decisions, which carries a great danger, especially in terms of development sustainability. On the other hand, even destinations that have plans face major setbacks in their implementations. It can be concluded that these destinations face the threat that they will not be ready for tourism development which can result in a number of long-term adverse effects related to certain aspects of sustainability, especially socio-economic and environmental.

The adopting and implementing the principles of sustainable development through effective partnerships and practices, success in achieving sustainable tourism development can be realized. All stakeholders should have the opportunity to have the same level of knowledge/ understanding of the issues. This may require that specific stakeholders be given opportunities for education about the topics that are to be addressed in the decision making process. Once everyone in the process has the same level of knowledge, decisions can be made that utilizes the collective wisdom of all the stakeholders.

Limitations which are present and influence the stakeholders' collaboration were related to:

- lack of financial resources,
- human resource limitations,
- passive attitude towards market demands,
- insufficient knowledge on market trends,
- poor cooperation among destination stockholders and
- the lack of product development strategy.

It was concluded that the government and its institutions should play more active role to support and promote the development of rural tourism hand in hand with agriculture. If the various and valuable conditions are used properly, the sectors would contribute to the development of rural areas, to the economy as a whole, to the reduction of unemployment in rural areas, to curbing immigration. They would stop the depopulation of rural areas, increase the standard of living in rural areas, and have impact on the development of agriculture too. In such a way it could become simultaneously an additional source of farm income for those who would offer this kind of tourism, but also could create or boost local market for local traditional and organic products (as it was shown in the case studies). In addition to economic benefits, rural tourism also contribute to the development of society by developing human resource as well as the preservation of cultural values and promote environment-friendly approaches.

The local governments have concluded that a long road is often faced when trying to transform the concept of sustainable tourism from theory into practice because there are many barriers constraining the tourism industry from implementing sustainable practices. The local government is aware of sustainable tourism principles, but they find it hard to accommodate them in practice. Additionally, not all the stakeholders have a good understanding of what is required to develop successful sustainable tourism. Despite great effort made by local

government to implement these plans and policies, this research shows they have limited effectiveness in driving tourism enterprises towards sustainable tourism.

Regional and local authorities have a critical role in tourism sector. It is important that the various functions of regional and local authorities can influence in tourism and its impact, should engaged in this process. There should be a communication process that goes in two directions between the objective and the higher and subordinate bodies, whether local, regional or national.

Management authorities should establish effective communication and consultation within the destination, through newsletters, websites. A strategy and an action plan should be prepared as important tools for addressing the form of tourism in the destination, identifying priorities and coordinating stakeholder activities. Specially the main challenges and opportunities identified in this Study should be taken into consideration, and interpreted according to local circumstances. This is a dynamic and continuous process where objectives, goals and actions are monitored and reviewed over time in the light of the obtained results and changed circumstances.

There is a lack of 'space' for local communities and tourism enterprises in setting out, as well as implementing, plans and policies on sustainable tourism development and environmental management (furthermore the environmental resources are almost all public goods). Local government has assumed responsibility for driving the sustainable tourism agenda. But the roles and responsibilities of local government in working towards sustainable tourism have not been well defined, and that these have been confounded by issues surrounding the practical implementation of the concept.

Recommendations

Sustainable tourism is the future of economic development in the CBC region. Sustainable development requires that both levels of governments should take their responsibilities and collaborate on development. The holistic and equitable principles that underpin sustainable development imply the need to bring together a wide range of stakeholders to develop and manage tourism in a sustainable manner. Local governments and

policymakers should consider this in designing appropriate tools and strategies to encourage sustainable tourism development. An understanding of the attitudes and responses of the tourism enterprises, tourists and local community towards sustainable tourism initiatives will assist in the successful implementation of policies designed to encourage the adoption of sustainable tourism development principles. There are some fundamental principles when implementing sustainability principles, which also have a particular impact on tourism as below.

➢ Approve a holistic and integrated approach - In planning and developing of tourism, it is necessary to consider impact at different levels. Moreover, tourism should be well-balanced and well-integrated with a whole range of activities that affect the society and the environment.

➢ Long-term plans - Sustainable development is to provide for the needs of future generations, as well as the present generations. Long-term planning requires the ability to support actions over time.

➢ Improvement of a plan and proper pace of the development - The level, the pace and the form of development should reflect and respect the character, resources and needs of host communities and destinations.

➢ Participation of all parties - A sustainable approach requires wide and committed participation in decision-making and the implementation of practices by all those involved in the outcome.

➢ Continuous monitoring - Sustainability consists, above all, in understanding impacts and in being aware that these impacts exist at any time, in order to make the necessary changes and improvements.

Furthermore, national and local government should engage all the stakeholders in the formulation of a strategy and policies for sustainable tourism, in order to represent all their perspectives and interests related with the sector.

The following activities should be implemented in the CBC region:

• Ensuring effective coordination of actions and an ongoing dialogue between stakeholders.

• Sustainable tourism planning and destination development requires the ability and institutional capacity to integrate multiple policy areas; considering a variety of natural, cultural and human assets.

- A destination cannot successfully implement the principles of sustainable tourism strategy without the right laws and regulations in place. Legislation should protect all the public resources used in tourism industry as the prime tourism offer. In such a way the destination can have a greater opportunity to be differentiated from its competitors.

- Local government should have a role not only in setting the direction for, but also in promoting sustainable tourism objectives within the destination.

- To achieve sustainable tourism, small and medium scale tourism enterprises have to be given more voice in government planning and policy. By doing so, it will increase tourism enterprises' responsibility towards sustainable tourism development.

- Finally, it is essential to consider that the strategy of sustainable tourism should involve the management of all tourism resources in a way that fulfills economic, social and aesthetic needs while maintaining cultural tourism.

Another mechanism for realizing more sustainable tourism requires the involvement of businesses to embrace sustainability. The Sustainability Agenda requires to influence businesses by encouraging them to think in the long term and to provide broader economic, social and environmental benefits while at the same time ensuring vitality and competitiveness where a prime demand of touristic businesses is to remain competitive. Associations and businesses have a particularly important role; thanks to the impact they have on the actions of their members. In order to take real progress on the road of sustainable tourism, tourists themselves should reflect the concerns of sustainability in their choice of travel and behavior. Responsible behavior by tourists to the environment and local communities is particularly important in the impact of tourism in developing countries, which may consequent from the behavior of tourists themselves but also from their choices, operators and businesses which adopt good practices.