

A high-speed photograph of water splashing, creating numerous droplets and bubbles against a blurred blue background. The water is captured in mid-air, with some droplets appearing as sharp, crystalline shapes while others are soft and out of focus.

# **Study on SPA Tourism in the REPUBLIC OF NORTH MACEDONIA**

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Република Северна Македонија

**Министерство за економија**



Republika e Maqedonisë së Veriut

**Ministria e Ekonomisë**

Сектор за туризам и угостителство  
Departamenti i turizmit dhe hotelierisë

**Disclaimer:** This study has been developed under the 2019 Tourism Development Programme. The opinions and views stated in this publication do not necessarily reflect the opinions and views of the Ministry of Economy of the Republic of North Macedonia

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## LIST OF ABBREVIATIONS

UNWTO	United Nations World Tourism Organisation
ESA	European Spas Association
APST	Agency for Promotion and Support of Tourism
GWJ	Global Wellness Institute
UNDP	United Nations Development Programme
FECC	Federation of European Carnival Cities
LED	Local Economic Development

## ABSTRACT

Spa tourism, as a specific type of tourism globally, has noted an increasing growth and it represents an important part of the tourism offer of many countries. In this study, analysis were made of the potentials of the spa resorts, scattered in various locations in the Republic of North Macedonia, so as to establish perspective of future development of the spa tourism in the country. Through the research, the existing state of the spa tourism in the country has been established, and this document has been improving the insufficient level of knowledge on the potential of wellness tourism and its promotion. At the same time, the study opens opportunity for new investments in our country for this type of tourism, by selecting locations for construction of new spa resorts.

Main objective of this study is touristic valorisation of the spa resorts and of the manners and measures for their enhanced involvement in the tourism offer. Specific objective of the study is mapping, photographing, and singling out spa resorts as potential tourist attractions, by means of proposals on future locations for construction of new spa resorts.

In addition to the touristic valorisation of the spa resorts, the study also offers measures and recommendations on future activities relating to the operation of the spa resorts, their promotion, as well as alignment and improvement of the legislation and placement of appropriate touristic signalisation.





## INTRODUCTION

According to the United Nations' World Tourism Organisation (UNWTO), the arrivals of tourists during 2018 internationally have reached 1,400 million. The tourism consumption has reached USD 1,700 million, and the tourism industry participates with 10% in the global gross domestic product. Each tenth worker in the world has been employed by this sector.

Both, globally and in our country, the statistics relating to the tourism in the past decades has noted a continuous growth. In the Republic of North Macedonia, data related to the number of tourists and overnight stays in 2018, are as follows:

- » the number of tourists reaches as much as 1,126,935, of which 37.2% are domestic tourists, and 62.8% are international tourists,
- » the number of overnight stays in 2018 reaches as much as 3,176,808, of which 53% fall out to domestic tourists, and around 47% to international tourists.

Spa tourism is one type of tourism that has significant impact in the modern global trends. We may define wellness tourism as a visit and stay to facilities that give opportunity for healing and relaxation, by using thermal waters.

The abbreviation "spa" comes from the first letters of the Latin phrase "Salus Per Aquam", meaning "health through water". Also, in English, the word "spa" implies thermal spring, bathhouse, a place where people use thermal mineral spring to heal by taking a bath or drinking such water.

The overview of the relevant modern literature related to tourism for the needs of this study showed that there are many authors globally, who deal with spa tourism and who have published professional literature in this field in different countries. Globally, many continental and regional organisations were formed, dealing with spa tourism, and publishing statistical data related to this activity. Hence, the study uses international experiences and data from the Global Wellness Institute, the European Spas Association, instances of promotion of spa resorts by the National Tourism Organisation of Slovenia, and others.

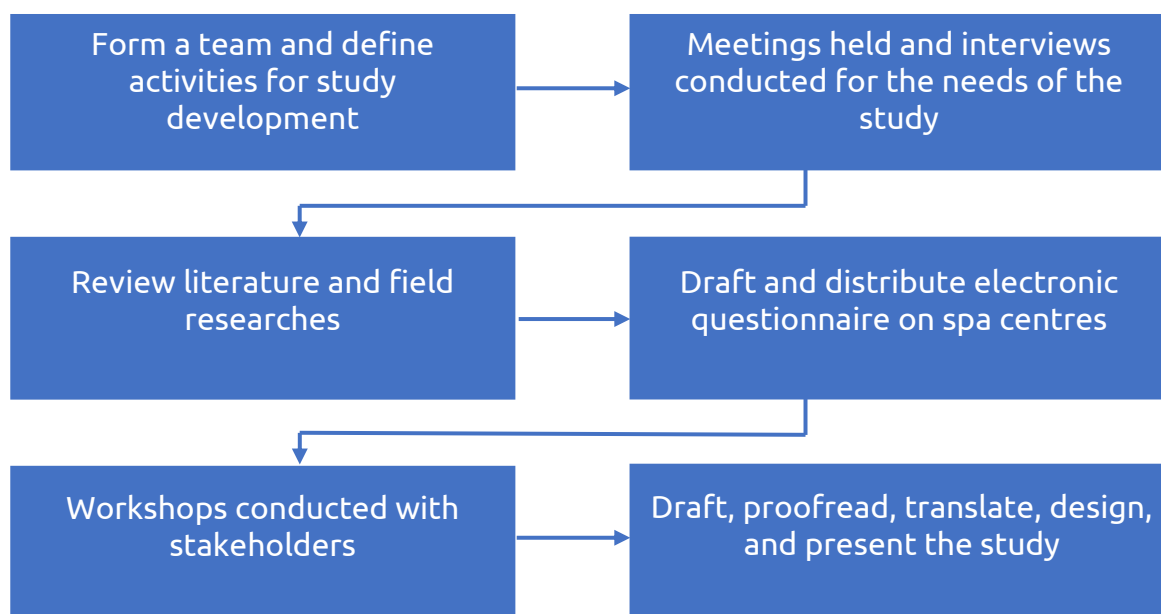
Given the modern manners and accelerated tempo of life, the needs of wellness tourism and spa resorts for recuperation and health condition improvement, as well as relaxation of tourists, as well as the increased demand in this sector, in the Tourism Development Annual Programme of the Republic of North Macedonia for 2019, drafted by the Ministry of Economy, a study has been included on spa tourism in the Republic of North Macedonia, as one touristic destination. The primary objective of this study is to develop touristic valorisation of unexploited facilities owned by the Republic of North Macedonia in the eight planning regions, the manners, and measures of their mainstreaming in the tourism offer, as well as their promotion. Main objective of the study is touristic valorisation of spa resorts and manners and measures of their inclusion in the tourism offer, by improving the promotion, aligning the legislation, touristic signalisation, as well as drafting proposals for future locations for construction of new spa centres.

## METHODOLOGY FRAMEWORK OF THE STUDY DEVELOPMENT

Целта Objective of this study is to do analysis, mapping and touristic valorisation of the spa resorts positioned in various locations in the Republic of North Macedonia. For the needs of the study, appropriate methodology was used, arising from the specific objectives, that is, positioning of spa resorts as tourist attractions, their promotion, alignment of the legislation and presentation of potential locations for construction of new spa resorts.

The study on spa tourism in the Republic of North Macedonia is an important document, pointing to potentials and opportunities of the development of tourism and spa centres in the country. The steps undertaken in the study development and the activities performed are the following: Form a team and define activities for the study development; meetings held and interviews conducted for the needs of the study (Ministries, municipalities, NGOs); review literature and field researches; draft and distribute electronic questionnaire on spa resorts; workshops conducted with stakeholders and draft, proofread, translate, design and present the study.

**Diagram 1.** Steps taken in the study development



In the study development, different research methods and instruments were used, such as: analysis of the content of Europe and world-related studies on spa tourism; analysis of the legislation related to tourism, catering and healthcare activities; analysis of statistical reports related to catering and tourism; qualitative researches (workshops with spa resort representatives); conduct of non-structured interviews with representatives of the local self-government, spa resorts, Ministries; creative thinking; field research of existing spa resorts by taking photos and visiting potential locations for spa resorts; desk analysis of relevant literature, bibliography and web sources; cartographic analysis and mapping of facilities; design, distribution and analysis of electronic questionnaire on spa resorts, and alike. The study has been developed in accordance with the existing tourism policy in our country, by consulting corresponding plans, programmes, and strategies at national, regional, and local levels, as well as the existing legislation.

For the needs of the study, secondary data sources were used by consulting relevant literature in the field of tourism and health, as well as the web. By using the web, materials have been collected, such as national strategies and sub strategies for tourism development, regional and municipal development programmes, laws directly or indirectly regulating tourism and healthcare,

for the needs of this study, which are further analysed in the research phase. Main method used in secondary research is the content analysis. Content analysis is a research method used for systematic assessment of the phenomenon explored, and in our case, the content of the legislation and strategic documents, as well as the tourism potential of spa resorts.

The primary data collected through the research related to this study, come from the electronic questionnaire and the field research. Also, the meetings and workshops held, as well as the non-structured (non-formal) interviews conducted led to collection of data, which further helped in the preparation of the questionnaire. For the needs of the study, a workshop was developed with representatives of the spa resorts, as well as the Aggrupation of Spas of the Association of Catering and Tourism within the Economic Chamber of the Republic of North Macedonia, to explain the study objectives. During that workshop, the spa resorts shared their recommendations, which are integral part of the spa tourism study. The electronic questionnaire, which is enclosed with this document, was used as a platform for data collection on spa resorts, and it was posted on the electronic platform google drive, with a short elaboration of the study objectives. It contains 16 questions and it was sent by email to the spa resorts and was responded by all of them. Based on the questionnaires responded and the data we received by the spa resorts, the study covered 4 spa resorts offering spa services, 3 wellness centres not offering spa services and 5 new locations with a potential of constructing spa resorts. The research team conducted their research in few months. Visit was paid to all spa resorts and potential locations for spa resorts, and the facilities were photographed. Through the field research, realistic data were possible to collect on the present situation, touristic capacities, and traffic connection of the facilities, as well as natural and cultural values located adjacent to the facilities were possible for visits.

In the entire process of developing the study, several coordination meetings took place with representatives from the Ministry of Economy – Tourism and Catering Section. During these meetings, the Ministry representatives were briefed on the current and future activities related to the study, so that recommendations and instructions were provided by them for successful implementation of the research.

Touristic valorisation of spa resorts in the Republic of North Macedonia were made, which are incorporated in the spa tourism offer in the country. For each spa resort, the following are provided: description of the tourist facility, adjacent natural and cultural values, traffic connection, etc. Based on the data collected from the primary and secondary research for the needs of the study, measures and recommendations are provided for future activities related to the spa resorts, the legislation was aligned, as well as promotion, tourist road signalisation and potential locations for construction of new spa resorts by investors were implemented, which would further increase the wellness tourism offer and would lead to creation of a specific tourism product in the Republic of North Macedonia.

# I. GLOBAL TRENDS IN SPA TOURISM

Spa tourism implies visit and stay into specialised facilities offering opportunities for healing and relaxation, by using thermal water. It is directly related to the use of thermo-mineral waters. In this section of the study, the material have been processed, relating to the historical development of the spa tourism, regional distribution of spa tourism worldwide and international experiences relating to spa tourism.

## 1. Historical development of the spa tourism

Relevant research worldwide shows that thermal springs started to be used for healthcare purposes as of VI century BCE (Before Common Era). The discoveries of the Asian archaeologists point to the data that thermal springs were used for bathing 5000 years ago. Similar is the situation with other continents, such as North and South America (Indians), Africa (Egyptians), Near East, Australia, and Europe (Greeks and Romans). In Eastern Europe, people would use thermal springs for bathing and other purposes for several thousands of years. In Europe, the Romans have left behind the greatest heritage of spas in the territories that used to be part of their Empire. Visitors staying in the baths of that time, not only enjoyed the water benefits, but they would have distinct types of party and therefore various theatre plays, athletic competitions and festivals would be organised and held in the places where spas were located. In the neighbouring Bulgaria, the tradition of using healing features of the mineral waters started as of the Thracians, which were famous after their utilisation for healing purposes.

In the Republic of North Macedonia, archeologic researches show that the thermal springs for bathing purposes were initially used by the Romans, and later by the Turks, who were famous spa appreciators.



Spa in the city of Bath in England, which represents one of the main tourist attractions of the city, attracting more than million tourists during the year.



As a volcanically active country, there are hundreds of hot springs in Japan, used for bathing and medical purposes by visitors. The traditional hot springs in Japan are called onsens, and the first Balneology Institute in this country was opened at Kyushu University in 1931.



The city of Rotorua in New Zealand is known for its hot springs that may be seen throughout the whole territory of the city.

At the territory of the former Soviet Union, in the greatest part of today's Russia, there are more than 3500 spa resorts. In USA there are 115 thermal springs and more than 1800 hot springs, and the first Hydrotherapy Institute in this country was opened in 1851 in New York. The types of utilisation of thermal springs are most diverse, starting from construction of aquaparks, such as Beshenova in Slovakia, arranging thermal lakes for tourism purposes, such as Heviz in Hungary, tourist attractions and conserved Roman Spas, such is the Esaline Hammam in Algeria, Bath in England, etc. Interesting data is that in 1553 in Venice, the first book was published on European spas, listing more than 200 hot springs.

In the Belgian city Spa, the thermal tourism started its development as of XVIII century, and its rise it denotes in the mid of XIX century, when the touristic infrastructure was built, lasting even nowadays. Similar is the situation in other European countries, such as Italy, Germany, etc.



Picture postcard from the Belgian city Spa. Such picture postcards in our country were published by Debar Spas, dating back in the first half (1930-ties) of the past century

Historically, the thermal tourism shall experience its greatest development in the second half of the XIX century, whose influence is testified by many factors, such as industrialisation, traffic communication development, economic condition, etc. In Spain, for instance, in 1816m the Spanish King Fernando VII, adopted a Decree obliging the spa resorts in this country to hire medical and administrative staff, to serve the visitors. The royal elite in England, during the XVIII and XIX centuries was regularly visiting spa resorts in Cheltenham and Lamington, and these resorts were important places for communication and meetings, discussing political, economic, and social topics.



In Serbia, Vrњacka Spa started its development in the second half of the XIX century, when the first villas, hotels and lodging facilities for visitors were opened..

The spa resorts in Serbia were places where royal families would spend their vacations, and in 1914 the first Law on Hot Springs was adopted. This only attests the view that in this part of the historic development, it was mostly about tourists from the rich social elite that would take part in spa tourism, and in smaller portion was part of poorer classes and local population. In this period, to assert the medicinal features of spa resorts and medical procedures conducted in those, doctors, and professors from leading universities of that time would conduct researches and would publish works, listing the medical benefits of using thermo-mineral water. On the other hand, in this period many travelogues, books and tourist guides related to spa resorts in Europe, and one of the first describing spa resorts in England was published back in 1841. Scientific researches related to the use of thermo-mineral water resulted in organising the first International Balneology Congress that took place in Budapest in 1937.





Pamukkale is one of Turkey's most famous tourist attractions

After the Second World War, spa tourism, as well as the conventional tourism, started to do its increasing development, both in raising the number of tourists and overnights and in increasing the number and quality of spa services offered in spa resorts, improving the material base and tourism infrastructure, introduce animation of tourists, new products, and alike.



Healing, prevention, rehabilitation, and recreation in natural healing facilities bring into spa resorts new services and products, as well as higher quality. The thermo-mineral waters are used for relaxation, bathing, inhalation, and part of them for drinking, mud baths and other procedures.

## 2. Regional deployment of spa tourism worldwide

Bath in thermal mineral springs represents a developing market segment, as globally continuous growth is noted of consumers requesting to connect to nature, get to know culture traditions and follow alternative manners of improvement and restauration of health, rehabilitation, and prevention. Following these trends, arising from accelerated tempo of modern life, private investors, as well as governments of many countries have been investing in this sector. The governments in the countries with long-year traditions of using bathing facilities, promote this type of service as a key spa tourist offer. They have been investing in renovation and reopening of obsolete and previously closed-up bath resorts, as well as advancement of service standards and staff trainings, so as to meet the expectations of international tourists.

The Global Wellness Institute - GWI defines the industry of spa resorts (thermal mineral springs) as entirety of establishments making revenue from wellness, recreative and therapeutic utilisation of waters that have particular curing properties. In accordance with this definition, the estimate is that globally there are 34,057 facilities (spa resorts) disposing of thermal mineral springs in 127 countries. The estimate is that these facilities have generated revenue of USD 56,2 billion in 2017, hence employing around 1,8 million staff members.

**Table 1.** Spa resorts offering spa services and wellness resorts not offering spa services, and revenue earned, 2017

Spa resorts	Number of facilities	Revenue (USD billion)	Average annual revenue per facility
<b>With spa services</b>	8,816	371.1	4.202.972
<b>With no spa services</b>	25,241	19.1	756.825
<b>Total – Spa industry</b>	34,057	56.2	1.648.904

**Source:** Global Wellness Institute (2018) Global Wellness Economy Monitor. Miami: Global Wellness Institute.

The greatest number of spa resorts are traditional facilities for bathing, swimming and use of curing properties of thermal mineral springs. They direct their work to local markets and charge relatively low prices and taxes for usage of water. Around 1/4 of the centres are with higher level of development, they have touristic infrastructure, they are tourist-oriented and offer various spa services as added value. These resorts offering spa services have higher share in the revenue of the spa resort industry (66%), compared to spa resorts not offering spa services (34%), and they also note higher increase of revenue (average annual growth of 7,4% against 0,5% for those with no spa services, during 2015-2017).

The Global Wellness Institute makes a distinction into several regions for spa resorts and spa tourism worldwide, as follows:

- » Europe: USD 21,7 billion – revenue, 5,967 facilities
- » North America: USD 0,7 billion – revenue, 302 facilities
- » Asia-Pacific: USD 31,6 billion – revenue, 25,916 facilities
- » Latin America-Caribbean: USD 1,6 billion – revenue, 1,406 facilities
- » Sub-Saharan Africa: USD 0,08 billion – revenue, 50 facilities
- » Middle East-North Africa: USD 0,4 billion – revenue, 416 facilities





Global regions for spa resorts and spa tourism worldwide are the following: Europe, Asia-Pacific, Latin America-Caribbean, Sub-Saharan Africa, Middle East-North Africa.

**Table 2.** Number of spa resorts and revenue earned per region (2015 and 2017)

Region	Number of Facilities		Revenue (in billion USD)	
	2015	2017	2015	2017
Asia-Pacific	20,146	25,916	29.23	31.60
Europe	5,613	5,967	19.74	21.73
Latin America and Caribbean	1,148	1,406	1.20	1.60
North America	237	302	0.57	0.73
Middle East and North Africa	324	416	0.24	0.41
Sub-Saharan Africa	39	50	0.06	0.08
<b>Total</b>	<b>27,507</b>	<b>34,057</b>	<b>51.04</b>	<b>56.16</b>

**Source:** Global Wellness Institute (2018) Global Wellness Economy Monitor. Miami: Global Wellness Institute.

The regional deployment of spa resorts is strongly concentrated in Asia-Pacific and Europe, reflecting the centuries-old history of water-based healing and relaxation in these two regions. Together, Asia-Pacific and Europe account for 95% of revenue in the spa industry and for 94% of revenue earned.

These two regions are followed by Latin America-Caribbean, then Middle East-North Africa, North America, and lowest percentage of participation globally as per number of facilities and revenues is owned by Sub-Saharan Africa.

**Table 3.** Top 20 spa markets as per number of facilities and revenues earned, 2017

Country	Number of facilities	Revenue (USD billion)	Ranked in 2017
China	3,900	17,501.1	1
Japan	20,972	12,795.5	2
Germany	1,265	7,151.9	3
Russia	838	3,667.2	4
Italy	768	1,718.3	5
Austria	181	961.1	6
Hungary	546	793.2	7
Brazil	207	718.0	8
Spain	293	683.1	9
Poland	203	674.5	10
Turkey	295	667.3	11
USA	280	631.0	12
Czech Republic	131	627.8	13
France	175	627.7	14
Switzerland	73	479.5	15
Slovenia	86	451.0	16
Slovakia	116	439.8	17
Taiwan	251	434.5	18
Island	154	432.6	19
South Korea	108	336.1	20

**Source:** Global Wellness Institute (2018) Global Wellness Economy Monitor. Miami: Global Wellness Institute.

From the table above, we may conclude that in top 20 spa markets as per number of facilities and revenues earned, the primate is held by China. It is followed by Japan, Germany, Russia, and Italy.



Secenji Spa located in Budapest is one of the largest spa resorts in Europe and it represents an important tourist attraction of the city.

The regional statistics on spa tourism and spa resorts in the region of Europe, as per GWI research, shows the following data:

- » Number of establishments in spa industry 5,967
- » Revenues of establishments in spa industry USD 21,7 billion
- » Employments in spa industry 438,424

**Table 4.** Top 10 spa markets in the region of Europe, 2017

Country	Number of establishments	Revenue (USD million)
<b>Germany</b>	1,265	7,151.9
<b>Russia</b>	838	3,667.2
<b>Italy</b>	768	1,718.3
<b>Austria</b>	181	961.1
<b>Hungary</b>	546	793.2
<b>Spain</b>	293	683.1
<b>Poland</b>	203	674.5
<b>Turkey</b>	295	667.3
<b>Czech Republic</b>	131	627.8
<b>France</b>	175	627.7

**Извор:** Global Wellness Institute (2018) Global Wellness Economy Monitor. Miami: Global Wellness Institute.

According to GWI research, regional statistics on spa tourism and spa resorts in Asia-Pacific show:

- » Number of establishments in the spa industry 25,916
- » Corporate revenue in the spa industry USD 31,6 billion
- » Employments in spa industry 1,244,661



People using spas so as to the natural healing have noticeable place in healthcare, and it is attested by the increasing visits to spa resorts. Therefore, the healthcare sector is interested in advancing spa resorts and hence, the economy (catering, trade, traffic).



**Table 5.** Top 10 spa markets in Asia-Pacific region, 2017

Country	Number of establishments	Revenue (USD million)
<b>China</b>	3900	17501.1
<b>Japan</b>	20972	12795.5
<b>Taiwan</b>	251	434.5
<b>South Korea</b>	108	336.1
<b>New Zealand</b>	120	285.2
<b>Philippines</b>	153	70.7
<b>Australia</b>	42	68.1
<b>Vietnam</b>	32	23.7
<b>Indonesia</b>	46	22.9
<b>Thailand</b>	58	16.9

**Source:** Global Wellness Institute (2018) Global Wellness Economy Monitor. Miami: Global Wellness Institute.

The regional highlights on spa tourism and spa resorts in North America, according to the GWI research show the following data:

- » Number of establishments in the spa industry 302
- » Corporate revenues in spa industry USD 0.7 billion
- » Employments in the spa industry 10,660

**Table 6.** Top 10 spa markets in North America, 2017

Country	Number of establishments	Revenue (USD million)
<b>USA</b>	280	631.0
<b>Canada</b>	22	97.1

**Source:** Global Wellness Institute (2018) Global Wellness Economy Monitor. Miami: Global Wellness Institute.

The regional statistics on spa tourism and spa resorts in Latin America-Caribbean, as per GWI research, show the following data:

- » Number of establishments in spa industry 1,406
- » Corporate revenues in spa industry USD 1,6 billion
- » Employments in spa industry 57,576

**Table 7.** Top 10 spa markets in Latin America-Caribbean, 2017

Country	Number of establishments	Revenue (USD million)
<b>Brazil</b>	207	718.0
<b>Argentina</b>	179	251.3
<b>Mexico</b>	587	216.0
<b>Costa Rica</b>	45	140.2
<b>Chile</b>	78	87.1
<b>Uruguay</b>	32	68.4
<b>Peru</b>	44	39.8
<b>Ecuador</b>	50	22.8
<b>Columbia</b>	52	21.1
<b>Guatemala</b>	18	8.3

**Source:** Global Wellness Institute (2018) Global Wellness Economy Monitor. Miami: Global Wellness Institute.



The regional statistics on spa tourism and spa resorts in Middle East-North Africa, according to the GWI research show the following data:

- » Number of establishments in spa industry 416
- » Corporate revenues in spa industry USD 0.4 billion
- » Employments in spa industry 20,324

**Table 8.** Top 10 spa markets in Middle East-North Africa region, 2017

Country	Number of establishments	Revenue (USD million)
<b>Tunis</b>	126	189.9
<b>Israel</b>	6	66.5
<b>Algeria</b>	181	45.4
<b>Iran</b>	46	34.3
<b>Morocco</b>	18	29.6

**Source:** Global Wellness Institute (2018) Global Wellness Economy Monitor. Miami: Global Wellness Institute.

The regional statistics on spa tourism and spa resorts in Sub-Saharan Africa, according to the GWI research show the following data:

- » Number of establishments in spa industry 50
- » Corporate revenues in spa industry USD 0,08 billion
- » Employments in spa industry 1,130

**Table 9.** Top 10 spa markets in Sub-Saharan Africa, 2017

Country	Number of establishments	Revenue (USD million)
<b>South Africa</b>	29	58.2
<b>Ethiopia</b>	4	7.1
<b>Namibia</b>	3	5.9
<b>Madagascar</b>	4	4.1

**Source:** Global Wellness Institute (2018) Global Wellness Economy Monitor. Miami: Global Wellness Institute.



### 3. International experiences related to spa tourism

The international spa tourism experiences that we may take as positive examples and practices are higher in number. The association of spa centres into national, regional, continental associations contributes to the development of spa tourism.

**European Spas Association.** According to the European Spas Association ([www.europeanspas.eu](http://www.europeanspas.eu)), there are more than 1,400 spa centres in Europe, with 10,000 facilities employing around 750,000 workers. The European Spas Association (ESA) was established in 1995 in Brussels, with 21 members from 20 European countries. To accomplish cooperation and exercise the interests of the European spa resorts, the Association has set the following objectives:

- » Monitor and analyse the state of spa resorts and health facilities in individual European member states;
- » Encourage the Exchange of experiences, best practices, and know-how;
- » Produce and develop health and welfare products and programmes, as well as prevention and rehabilitation strategies for all citizens of Europe;
- » Establish, promote, and improve standards in all spa resorts and health facilities within Europe;
- » Encourage research in spa resorts;
- » Define and harmonise joint training course programmes and establish the professional structure of the European spa industry;
- » Establish a framework for cooperation and marketing opportunities for its members, etc.

ESA has developed and adopted its own standards of service quality in European spa resorts and it has been issuing certifications recognised by tour-operators and health insurance in Europe. These standards are developed on the basis of more than 1000 quality and safety criteria for the medical use of springs, swimming pools, saunas, diagnostics, types of treatments, quality management, human resources, preparation and types of food, accommodation, environment, and other supplementary facilities in the spa centres.

**Karlovy Vary.** The development of spa tourism at local level, that is, in terms of integrated offer of tourist services and products at the destination level, we may present through the example of the destination of Karlovy Vary.

Spa tourism is widespread across European countries, and an interesting example of products that may be purchased and contribute to local economic development in a tourist destination developing this type of tourism is Karlovy Vary. Depending on the interest of tourists, taste and financial opportunities, there are several souvenirs and products that may be purchased at Karlovy Vary:

- » Aquila Aquiline is a complete line of face and body cosmetics, made of spring water from Karlovy Vary, rare minerals and other active ingredients contained in this line. This line offers a complete selection of face cleansing lotions, tonics, moisturising and nourishing facial creams, anti-aging creams, exfoliating shower gels, anti-cellulite creams, etc. These products are made by Ostrava – a local company, and these products may be found in almost any pharmacy in the Czech Republic;
- » Becherowka, herbal liqueur. If tourists want to try a bitter-sweet taste, then a bottle of Becherowka would be the right gift. This drink is made of about 20 varieties of herbs and other ingredients by recipe that is known only by the closest descendants of the first Becherowka producer - Jan Becher. In the centre of Karlovy Vary is also the Jan Becher

Museum and the first Becherowka factory. In the Czech Republic, there is hardly a household that does not have at least one bottle of Becherowka;

» Karlovy Waffles are also a symbol of Karlovy Vary. In the distant 1856, Karel Reitenberger began making them, and their shape and taste have not changed to this day. They are produced in a variety of flavours (chocolate, vanilla, hazelnut, coconut, apple, etc.) at any souvenir shop or street stalls can be bought fresh or packed in unified boxes at any time so visitors can enjoy bringing home as a souvenir;

» Karlovy thermal spring water cups. These cups are certainly a symbol of the city, as it is impossible to walk through Karlovy Vary without seeing them in every store or, simply, any visitor to Karlovy Vary walking around can be spotted with such a cup, full of spring hot water in his hand. These porcelain cups are specially designed to withstand temperature and CO<sub>2</sub>.



Karlovy Vary is a spa destination located in the Czech Republic and is visited by a large number of tourists throughout the year.

The examples above of moving the local economy through the use of thermal mineral hot spring benefits, proper marketing, and the image of the tourist destination, indicate the need for such activities in the spa resorts in our country, as well. These activities would be performed in favour of the development of the spa tourism and enrich the tourist offer and tourist experience of spa resort visitors in the Republic of North Macedonia.

**Promotion of spa tourism in Slovenia.** The promotion of spa tourism and spa resorts nationwide is of immense importance for its development. Through the example of the National Tourism Organisation of Slovenia, we can see that this country has paid serious attention to the spa resorts and their proper promotion on their official website ([www.slovenia.info](http://www.slovenia.info)).





The spa resort Chatezh in Slovenia is one of the most famous spa destinations countrywide.

On its official website, Slovenia promotes itself as a destination of hot springs and spas. The spa resorts in the country are presented and disaggregated into:

- » Healthcare resorts offering treatments
- » Prevention and medical wellness
- » Wellness
- » Aqua party and fun parks with hot springs.

**Spa centre management.** The management of spa resorts with the modern conditions of spa tourism development is of immense importance for the development of this type of tourism. The work process in spa resorts is very heterogeneous. It combines processes of healthcare, accommodation (hotel services), restaurant services (preparing and serving food to guests), additional services and protection.

The healthcare part of the spa is performed by doctors with specialisations in the field of medicine. The spa also has medical support staff needed to perform the job successfully, as well as appropriate infrastructure and equipment. This includes the use of additional spa services.

The accommodation part of the spa resorts is of immense importance, as it has to meet modern standards and should take into account the guests who may have diverse needs, that is, requirements for accommodation and movement from the hotel to the healthcare area.

The restaurant part of the spa resorts is a very important element. It refers to the successful and efficient execution of works in the preparation of quality and healthy nutrition according to the needs of the guests and proper and quality serving of guests.





Spa resort management encompasses processes of healthcare, accommodation (hotel management), restaurant (preparing and serving food to guests), supplementary services and protection.

Extra services and animation programmes and supplementary activities designed to meet the tourists' leisure time vary depending on the tourist infrastructure and human potential of the spa resorts.

In contemporary living conditions, characterised by rapid industrial development, dynamic technical and technological changes, as well as modernisation and urbanisation of settlements, the deterioration of the quality of the environment is increasingly evident. Therefore, many residents of such areas need to visit areas that are not endangered. Spa resorts are places where nature care is first-class. Protection would enable them to preserve the authenticity of nature and be widely visited. If bathing areas lose their value, their use shall be marginalised.

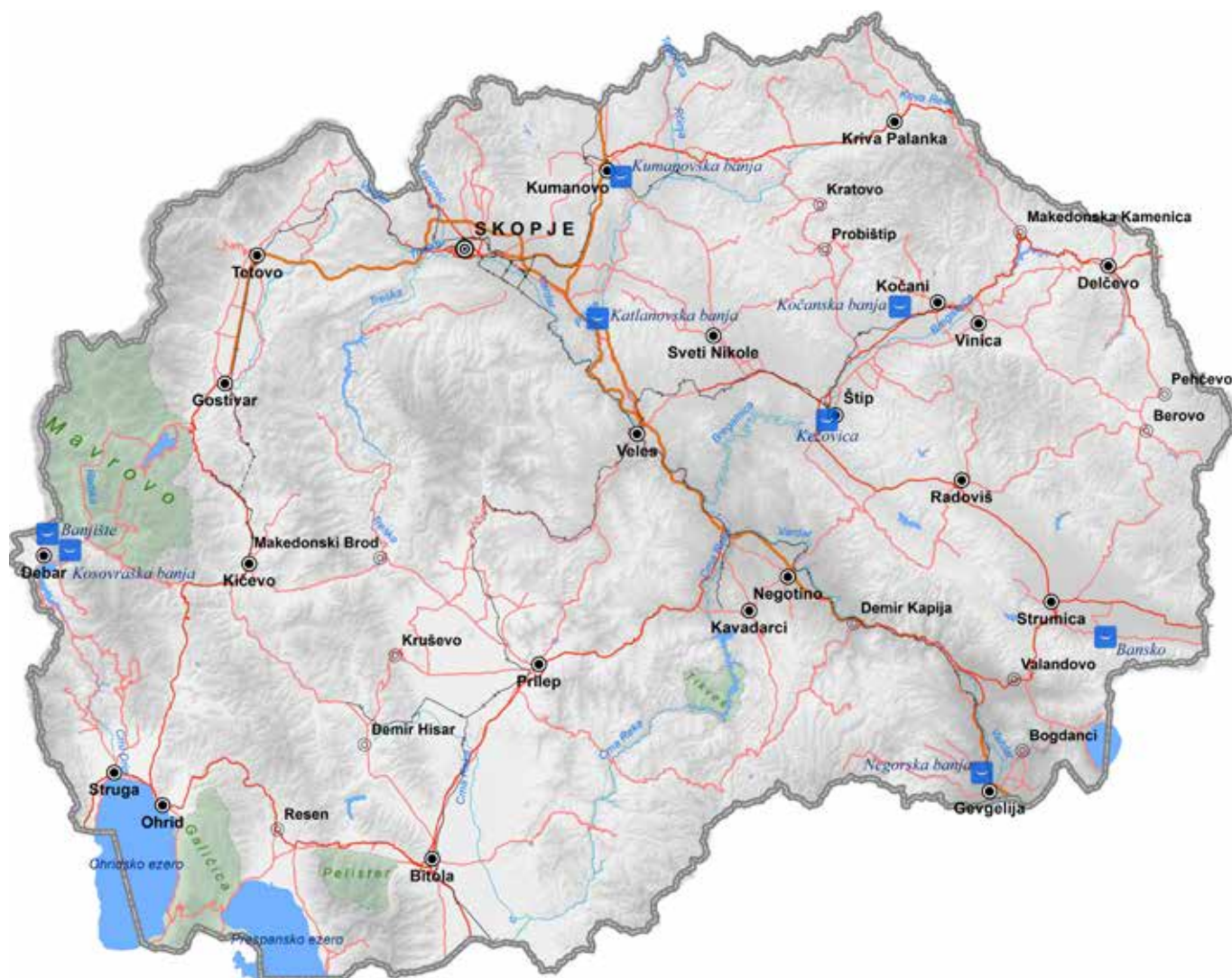


## II. POTENTIALS OF SPA TOURISM IN THE REPUBLIC OF NORTH MACEDONIA

Spa resorts are tourist motives attracting tourists with hydrological characteristics expressed primarily by the chemical and mineralogical composition and thermic characteristics, as well as the cost savings of the hot springs that provide minimal conditions for their use. In the Republic of North Macedonia, according to the Law on Mineral Resources, thermal mineral hot springs are groundwaters characterised by increased temperature (above 20 °C) and mineralisation (larger than 0.5 grams per litre).

Thermal mineral hot springs are among the natural resources with the label of express convenience for satisfying the tourist needs in the Republic of North Macedonia. There are more such hydrographic facilities in the area the country covers (25,713 km<sup>2</sup>). The number of thermal mineral springs in our country is over sixty, and for tourist and healthcare needs, that is, spa centres, only 8 are in use. Of them, 5 offer spa services (Debar Spas - Kosovrasti and Banjishte, Katlanovska Spa, Negorska Spa and Bansko Spa), and 3 do not offer any spa services (Kumanovska Spa, Kezhovica Spa and Kocanska Spa). The second group includes the spa in the village of Banje (Kocanska Spa), which is currently not in function. The Kumanovska Spa works only seasonally, and Kezhovica Spa works year-round.

There are several thermal hot springs in the country that are used by visitors and tourists, such as the spa in the village of Strnovac, however, it lacks medical staff and accommodation facilities, it only has a swimming pool and showers. There are also several potential locations for spa resorts.





**Table 10.** Overview of spa resorts in the Republic of North Macedonia

	Spa name	Location	Region	Cost saving of hot springs	Water temperature
1	Bansko	v. Bansko	South-East	40 l/sec	72°
2	Negorska	v. Negorci	South-East	1.1 l/sec	40°
3	Debar Spas	v. Banjishte v. Kosovrasti	South-West South-West	51 l/sec 68.8 l/sec	38.8° 48°
4	Kocanska	v. Banja	East	65 l/sec	64°
5	Kezhovica	v. Novo Selo	East	36 l/sec	64°
6	Katlanovska	v. Katlanovo	Skopje	1.5-2 l/sec	41°
7	Kumanovska	v. Proevci	North-East	2.5 l/sec	30.4°

It may be seen from the table that most of the spas resorts (5) in the Republic of North Macedonia, are located in the eastern part of the country, two are located in the western part and one in the central part.

In addition to the spa centres, there is a considerable number of hotels and spa resorts in the Republic of North Macedonia that offer specialised spa services to visitors and tourists.

The regional distribution of hotels offering spa services in the Republic of North Macedonia is as follows: Skopje Region 11, South-West Region 6, East Region 4, Polog Region 3, Pelagonija, South-East and Vardar Region 2 each, and North-East 1 hotel offering spa services. In total, there are 31 hotels in the country offering spa services. In addition to hotels offering spa services, there are specialised facilities in the country with built-in infrastructure and purpose-built spa services such as: Endomak, Silhouette, Aseana Royal Spa, Babor Beauty Spa, Bliss Beauty Centre & Spa, Dior Spa, Aura Spa & Beauty Centre, Sky Wellness as part of Cevahir Sky City, Synergy Fitness & Spa and others.

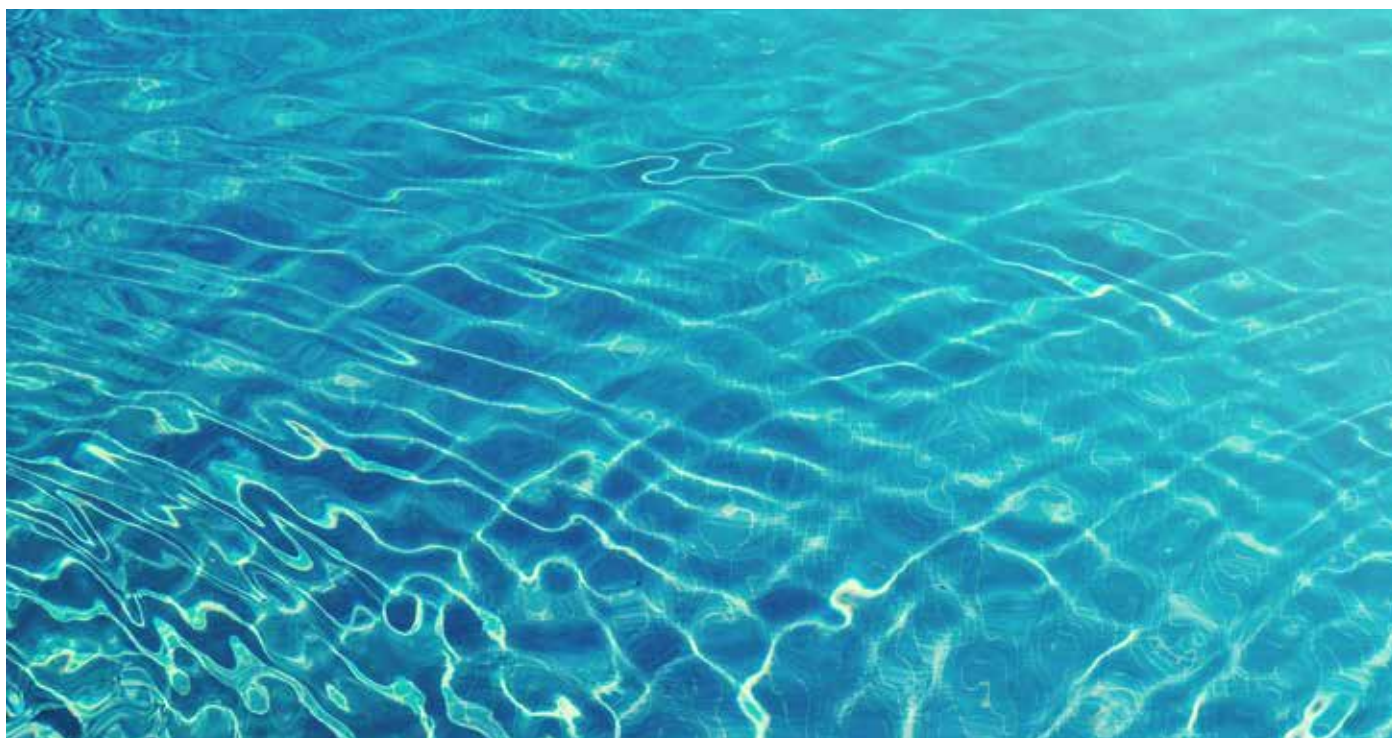




**Table 11.** Regional distribution of hotels offering spa services in the Republic of North Macedonia

Hotel	City	Region
1. Modern Apartments Spa and Restaurant	Demir Kapija	Vardar
1. Gardenia Hotel & Spa	Veles	Vardar
1. Hotel Epinal - SPA & Casino	Bitola	Pelagonija
1. Panorama Hotel & Spa	Krushevo	Pelagonija
1. Aleksandar Palace Hotel & Spa 2. Bushi Resort & Spa 3. DoubleTree By Hilton Skopje 4. Garden Spa Boutique Hotel 5. Hotel Panoramika Design & Spa 6. Hotel Russia 7. Park Hotel & Spa 8. Solun Hotel & Spa 9. Stone Bridge Hotel 10. TCC Grand Plaza Hotel 11. Marriott Hotel	Skopje	Skopje
1. Tino Hotel & Spa 2. Inex Gorica Hotel & Spa 3. Unique - Resort and Spa 4. Aleksandar Villa & Spa	Ohrid	South-West
1. Hotel Izgrev Spa & Aquapark 2. Mirage Hotel & Spa	Struga	South-West
1. Hotel Ramada Plaza	Gevgelija	South-East
1. Hotel Sirius Spa and Wellness	Strumica	South-East
1. Central Hotel, Fitness and Spa	Vinica	East
1. Aurora Resort & Spa	Berovo	East
1. White Stone	Radovish	East
1. Hotel Gogov	Pehcevo	East
1. Etno Selo Timcevski	Kumanovo	North-East
1. Hotel Radika	Mavrovo	Polog
1. Agropolog Hotel & Spa 2. NB Hotel & Spa	Tetovo	Polog

**Source:** Official websites of accommodation facilities.



## 1. Statistical data related to tourism in spa resorts

The volume and structure of tourist frequency shall be seen through the arrivals and overnight stays of tourists in spa resorts. The volume and structure of tourism frequency best reflect the developmental dimension of spa tourism in our country. They express the level of visits and stay, and through them we may determine the average stay.

**Table 12.** Arrivals of tourists in spa resorts 2010-2018

	2010	2011	2012	2013	2014	2015	2016	2017	2018
<b>Total for RNM</b>	586,241	647,568	663,633	701,794	735,650	816,067	856,843	998,841	1,126,935
<b>Total for spa resorts</b>	28,574	27,441	27,430	28,405	29,532	29,169	28,276	32,189	31,244
<b>Domestic tourists</b>	24,688	23,401	23,826	24,380	25,534	25,533	24,525	28,227	26,778
<b>International tourists</b>	3,886	4,040	3,604	4,025	3,998	3,636	3,751	3,962	4,466

**Source:** State Statistical Office (2019), Statistical Annual Book of the Republic of Macedonia for 2019, Tourism in the Republic of North Macedonia 2008-2018. Skopje: State Statistical Office.

Table 12 shows that in the analysed period from 2010 to 2018, the number of tourists in the Republic of North Macedonia (RNM) is steadily increasing. Spoken in figures, in the last 9 years the number of tourists has increased by about 92%. The number of tourists who visited the spa resorts in the same period denotes a slight increase of 9.3%. Of the total number of tourists in 2010, spa resorts were visited by 28,574 tourists or 4.8%, and in 2018, 31,244 tourists or 2.8%. It is obvious that the percentage of tourists who visit the spa resorts within the total number of tourist movements in the country is insignificant, which is mainly due to the lack of long-term strategy for development of spa tourism, insignificant investments in spa resorts, poor promotion and so on. It can also be seen from the table that 85-86% of tourists who visit spa resorts are domestic, and only 14-15% are international tourists, which means that steps should be taken in the future to improve the quality of services in the spa resorts and expand their assortment, as well as devise a promotional strategy to attract international tourists.

**Table 13.** Overnight stays in spa resorts 2010-2018

	2010	2011	2012	2013	2014	2015	2016	2017	2018
<b>Total for RNM</b>	2,020,217	2,173,034	2,151,692	2,157,175	2,195,883	2,394,205	2,461,160	2,775,152	3,176,808
<b>Total for spa resorts</b>	216,526	220,640	216,516	222,362	224,374	215,541	227,919	245,074	237,551
<b>Domestic tourists</b>	189,324	193,274	190,749	195,665	199,159	192,750	201,781	217,064	206,804
<b>International tourists</b>	27,202	27,366	25,767	26,697	25,215	22,791	26,138	28,010	30,747

**Source:** State Statistical Office (2019), Statistical Annual Book of the Republic of North Macedonia 2019, Tourism in the Republic of North Macedonia, 2008-2018. Skopje: State Statistical Office.

Table 13 shows the number of overnight stays in RNM and in the spa resorts. Namely, in the analysed period from 2010 to 2018, the number of total overnight stays of tourists in our country has been continuously increasing, and for 9 years it has increased by about 57%, and the number of overnight stays in spa resorts has increased by 9.7%. Of the total number of overnight stays over the years, domestic tourists made 86-88% and international tourists 12-14%. As we mentioned earlier, tourism policy makers in the country need to take serious steps to improve the tourist offer in the spa resorts and promote it both, in the domestic and international tourism markets.

**Table 14.** Average length of stay in spa resorts 2010-2018

	2010	2011	2012	2013	2014	2015	2016	2017	2018
<b>Average for RNM</b>	3,45	3,36	3,24	3,07	2,98	2,93	2,87	2,78	2,82
<b>Average for spa resorts</b>	7,6	8,04	7,89	7,83	7,60	7,39	8,06	7,61	7,60
<b>Domestic tourists</b>	7,67	8,26	8,0	8,03	7,80	7,55	7,15	7,69	7,72
<b>International tourists</b>	7,0	6,77	7,15	6,63	6,31	6,27	6,97	7,07	6,88

**Source:** State Statistical Office (2019), Statistical Annual Book of the Republic of North Macedonia 2019, Tourism in the Republic of North Macedonia, 2008-2018. Skopje: State Statistical Office.

Table 14 provides an overview of the average length of stay in spa resorts from 2010 to 2018. It may be concluded that the average length of stay in the analysed period is 7,7 days, which is higher than the average length of stay of tourists in RNM, which was 3.01 in the past period. This is primarily due to the specifics of the spa tourism related to the duration of the therapeutic and medical treatments of the visitors. Domestic tourists in the spa areas spent an average of 7,76 days and international tourists 6,78 days.

**Table 15.** Arrivals of tourists per type of resorts in 2018

Arrivals of tourists	Domestic	International	Total
<b>Republic of North Macedonia</b>	419,590	707,345	1,126,935
<b>Skopje</b>	35,379	303,695	339,074
<b>Spa resorts</b>	26,778	4,466	31,244
<b>Mountainous resorts</b>	43,362	22,019	65,381
<b>Lakeside resorts</b>	256,255	247,918	504,173
<b>Other resorts</b>	57,816	129,247	187,063

**Source:** State Statistical Office (2019), Statistical Annual Book of the Republic of North Macedonia 2019, Tourism in the Republic of North Macedonia, 2008-2018. Skopje: State Statistical Office.

**Table 16.** Overnight stays of tourists per types of resorts in 2018

Overnight stays of tourists	Domestic	International	Total
<b>Republic of North Macedonia</b>	1,685,273	1,491,535	3,176,808
<b>Skopje</b>	56,371	509,441	565,812
<b>Spa resorts</b>	206,804	30,747	237,551
<b>Mountainous resorts</b>	99,085	40,827	139,912
<b>Lakeside resorts</b>	1,235,085	629,491	1,864,576
<b>Other resorts</b>	87,928	281,029	368,957

**Source:** State Statistical Office (2019), Statistical Annual Book of the Republic of North Macedonia 2019, Tourism in the Republic of North Macedonia, 2008-2018. Skopje: State Statistical Office.

Tables 15 and 16 show the number of tourists and overnight stays in RNM by type of resorts in 2018. Of the total of 1,126,935 tourists, 30% visited the capital city, 2.8% visited spa resorts, 5.8% visited mountainous resorts, 44.7% visited lakeside resorts and 16.6% visited other resorts. The structure shows that as many as 70.4% of the tourists have opted for the lakeside and the capital, with the least attendance at spa resorts. The number of overnight stays is almost the same. Namely, of the total of 3,176,808 overnight stays in the country in 2018, 58.7% were spent in lakeside resorts, due to the main motivation for traveling (vacation), and the remaining overnight stays were deployed as follows: 17.8% were in Skopje, 7.5% in spa resorts, 4.4% in mountainous areas and 11.6% in other resorts countrywide. From the tables it may be concluded that in the Republic of North Macedonia, the primacy for the number of tourists and overnight stays is held by the capital and the lakeside resorts, and the other destinations, especially the spa resorts, denote low attendance. Taking into consideration the natural potentials of the country for development of spa tourism, it is necessary that the state, as well as all interested parties undertake urgent measures for creation of quality development strategy for spa tourism, on the basis of which they would attract capital and other investments and would create a tourist product that would present RNM in the international tourism market.





## 2. Legal framework

The existing legislation in the Republic of North Macedonia, which is of interest for this study, we may divide into directly tourism-related and indirectly tourism-related.

The analysis of the legislation presented below shows that the laws as of the moment of their enforcement and up to today have went through many amendments and supplements so as to improve the legislation for the interests and needs of all stakeholders. .

The legislation directly related to tourism and that is of importance for this study is the following:

- » Law on Tourism Activity
- » Law on Catering Activity
- » Law on Tourism Development Zones
- » Law establishing Agency for Promotion and Support to Tourism
- » Law on Auto camps
- » Law on Mountain Trails
- » Law on Temporary Stay Tax

Beside the legislation and specific tourism-related laws, there is a number of books of regulations, regulating tourist and catering activity in the country, such as book of regulations on categorisation of catering facilities, book of regulation on traffic signs, equipment and signalisation 0related to tourist road signs leading to spa resorts, etc. As per the legislation indirectly related to the tourism development and are of special importance for the study, having in mind that spa resorts provide health activity, in addition to tourist activity the following laws were taken into consideration:

- » Law on Raw Minerals
- » Law on Healthcare
- » Law on Financial Investment Support
- » Law on Protection of Cultural Heritage
- » Law on Nature Protection
- » Law on Concessions and Public-Private Partnerships

In addition to the legislation that is indirectly related to spa tourism, there are also some rule-books regulating this activity, such as the Health Insurance Fund Regulations, with which the Fund signs contracts with spa centres and sends spa treatment users.

### 3. Strategy papers

In addition to the regulation in our country, while preparing the study, the development strategy papers were taken into consideration (programmes and plans) at national, regional, and local levels. Nationally, the strategies were analysed relating to tourism development, which treat the development of spa resorts and spa tourism, such as:

- » National Strategy on Tourism Development of the Republic of Macedonia, 2016-2020
- » National Strategy on Wellness Tourism of the Republic of Macedonia, 2012-2018
- » Physical Plan of the Republic of Macedonia – Physical Development Strategy.

Within the National Strategy on Tourism Development, the following analyses was developed on the spa resorts:

- » At the moment, the spa destinations around the mineral hot springs consist of accommodation facilities, such as hospitals with medical treatment space.
- » The visitors of such resorts are mainly Macedonians, or Macedonians living abroad, with a specific disease, who wish to improve their health condition.
- » The several hot springs used at the moment in the Republic of North Macedonia due to health purposes – are mainly located in the North-East and South-East region.
- » In the majority cases, several accommodation units were constructed around the hot springs for medical treatments.
- » Same as many other European spa destinations in the 1980s, the focus of the Macedonian spa destinations is exclusively intended for medical treatments of people with specific diseases.
- » There is a limited number of spa and wellness products offered in the majority of these spa destinations (excluding Banjishte).

As per the National Strategy for Wellness Tourism, there are 8 spas in the Republic of North Macedonia working mainly with domestic patients in scarce conditions offering basic health services (basic offer). Some have had no investment for many years, but on the other hand, each of the spas has the potential to growth.

At the regional level, the development programmes of the six planning regions with spa centres were analysed, in the areas relating to tourism and spa tourism. The following programmes were analysed:

- » Vardar Region Development Programme, 2015-2019
- » East Region Development Programme, 2015-2019
- » South-West Region Development Programme, 2015-2019
- » South-East Development Programme, 2015-2019
- » North-East Development Programme, 2015-2019
- » Skopje Region Development Programme, 2015-2019

At the local (municipal) level, the local economic development (LED) strategies of the municipalities where spa resorts are located, were analysed. In addition to LED strategies, other strategy papers on the development of municipalities, such as rural development strategies, tourism strategies, studies on the possible use of thermal springs, development plans developed through different projects were analysed.



## 4. Overview and condition of spa resorts in the Republic of North Macedonia

For the needs of the study, taking into account the global methodologies, the spa resorts in the Republic of North Macedonia are divided into two basic groups:

- » Spa resorts offering spa services, and
- » Spa resorts not offering spa services.

The first group includes the spa resorts: Banja Bansko, Debar Spas, Katlanovska Spa and Negorska Spa. The second group includes the following spas: Kezhovica, Kumanovska and Kocanska Spa (village Banje).

The spa resorts from the first group are affiliated to the Spa Aggrupation. Within the Catering and Tourism Association of the Economic Chamber of Tourism of the Republic of North Macedonia, a Spa Aggrupation was established in 2012, for the purpose of:

- » Considering matters related to resolving ongoing problems in the spa business operation;
- » Considering draft laws and other regulation, sharing opinions and proposals on matters of common interest for the members and raising initiatives for their adoption, amendment, and supplementation thereto;
- » Cooperation with competent authorities and institutions in the country, in accordance with the law and general acts of the Chamber and representing the interests of the Aggrupation members;
- » Coordination of the activities for organised participation at seminars, congresses, and other events of the members, countrywide and abroad;
- » Encouraging the enforcement of European rules and standards and permanent functional education and innovation of knowledge of professional staff in the field and other activities that would be mutually agreed by the Aggrupation members.

In the content below, a tourist valorisation was made of the two groups of spa resorts, so as to establish the tourism potentials at the disposal of the spas in the Republic of North Macedonia.



## 4.1. Spa resorts offering spa services

The spa resorts offering spa services are Banja BANSKO, Debar Spas, Katlanovska Spa and Negorska Spa.

### BANSKO SPA



Profile of the spa resort	Car Samoil, Bansko Spa
Accommodation capacity	✓
Conference Room	✓
Restaurant	✓
Cooperation with the Health Insurance Fund of RNM	✓
Medical Centre	✓
Diagnose mostly treated in the spa resort	
Basic spa services (Bathing)	✓
Additional SPA services	✓
Capacity of springs (l/sec)	52
Water temperature (°C)	72
Parking site (capacity/vehicles)	150
Additional activities	Organised excursions and events

**Historic development.** The Romans, through their construction activities, left visible traces on the territory of the municipality of Strumica. One of the most representative evidence of this is the Late Roman Thermal Spa facility in Bansko (Balneum), raised in the III and IV centuries. It is located about 12 km east of Strumica, at the foot of Belasica Mountain. The thermae was discovered in 1978 while digging the foundations of the Car Samoil Hotel. The facility used healing waters of Parilo spring, located 50 meters southwest, spotted long time ago by the Romans, and used as a great blessing in later times. So far, 11 rooms have been discovered in the spa, with different function, and primarily built of bricks combined with stone and mortar, achieving supreme harmony, with a total usable surface area of 623 m<sup>2</sup>.





Interior heating was designed and carried out using a special system that used hot water to heat the floors and walls. The spa was designed, like most Roman buildings, in the spirit of the needs of Roman health culture. The Roman Thermae also had a dressing room (apodyterium), where clothes were stored and hung. In a space called (diphtherium) was used by both, the sick and the enjoyers would apply oil on their bodies. The room called the tepidarium was between the hot bath (caldarium) and the cold bath (frigidarium). The walls are preserved at a height of 2 metres to 6.70 metres. Preservation is greatest in the rooms that served as a sauna and cold-water pool - frigidarium. The swimming pool and bathtub, which had a depth of about 1.5 m, occupied the main place in the thermae, and the staircase entered the pool itself. The daylight that would go in through the windows made the interior private and urban, and the pink oil and amber gave the steam an opiate. In addition to the therapeutic treatments, the spa was a place for young athletes and unemployed citizens alike. Current archaeological investigations indicate that the sanctuary existed before, as evidenced by the newly discovered older buildings. Built for the needs of people in antiquity, spas were also the centre of social life. There were gardens around them, as well as gymnasiums, libraries, and, of course, temples dedicated to the gods that protected human health. Strumica archaeologists have been constantly discovering new findings at the Roman Thermae site - Bansko Spa, including the marble statue of the god Mercury, who was said to have healing powers.

Thermal springs have remained attractive to people from this area until the late Middle Ages, as the "Turkish bath" toponym speaks. The second well-known toponym is "The Fair" which states in one opinion that these sources and Christian believers besides praying, were entertained and were doing trade here. With minor technical interventions, these Roman thermae may be completely reconstructed, thereby restoring it to the function it had more than one and a half millennia ago.

**Traffic connection.** The Bansko Spa is an intersection of important roads. This spa is connected to Strumica by traffic communication. It may be reached by an asphalt road. From the village of Dabile, a branch is separated towards Berovo through the Maleshevo Mountains. The other leads to the Petrich border crossing in the Republic of Bulgaria. The construction of the road from the junction near to Kuklish enables connection of the Valandovo - Dojran Region with the spa. To the north, the spa is connected via Radovish and Shtip with Skopje, which is very important for this complex.

**Natural values.** The immediate proximity of the spa at the foot of Belasica, as well as the proximity of the city, are a good opportunity for the mountain to be used for recreation and picnics. There are wonderful promenades and places with beautiful vegetation of diverse forest from which



the beautiful view of the Strumica Valley extends, which is a particular pleasure. Near the spa resort, there are several natural sites such as Smolare Waterfall, Gabrovo Waterfall, Mokrievu Springs and others. Near the village of Bansko there is also the Monospitovsko Blato, which is a large swamp and is characterised by great biodiversity and trails for the movement of visitors and bird watching. Traditionally people used to ride boats within the swamp. Strumica Valley is rich in gardening and other crops which gives it superior quality. This enriches the spa's tourist offer. The diversity of forest vegetation creates an interesting colour that refreshes the visitors. The proximity of Belasica Mountain is an exceptional quality, where the wildlife is diverse. The following types of game are represented: wild boar, deer, rabbit, pheasant, partridge, and others. They are important for the development of hunting tourism as a complementary selective form of this activity.

**Hydrography characteristics.** The spring capacity is 52 litres per second and the water temperature is 72°C. The spring of Bansko Spa belongs to the group of sodium - sulphur, alkaline and nitrogen waters containing rare minerals. It is of juvenile origin, that is, it comes from a great depth and has no atmospheric influences. The abundance of water temperature does not change, which is of particular importance for its use. This especially relates to tourism development.

**Healing prospects.** The following diseases are successfully treated in the spa resort:

- » Sciatica and polyarthritis;
- » Diseases of respiratory organs (bronchitis, asthma);
- » All types of rheumatic diseases;
- » Diseases of the digestive organs (ulcer, gastritis, intestinal diseases);
- » Post-fracture bone condition;
- » A post-jaundice condition;
- » Nerve diseases;
- » Female gynaecological diseases (infertility, ovarian inflammation, etc.).

All of the above diseases are treated today in the public health organisation, Natural Bansko Spa sanctuary, that is, hotel Car Samoil. The hotel is equipped with modern facilities for patients - therapy and medical rehabilitation. There is an option of sports-recreational and entertaining character, using Chinese therapy, pool, and hydrotherapy.

**Cultural values and manifestations.** Near to the spa resort, there are a number of objects of cultural importance. The church "St. 40 Martyrs of Hospitaliers" is located in the village of Bansko, which was built in the IV-V century after the fall of Samoil's state, that is, it was demolished in the XI-XII century and today only some of its insignificant remains may be seen. In the fertile Strumica Valley near to the village of Banica lies the tomb of Struma, the legendary daughter of the Roman emperor Tibet. The Carevi Kuli Fortress, located on the plateau of the hill that rises above Strumica, is a real tourist attraction. The picturesque frescoes in the churches should be amongst the mentioned elements from the cultural and historical values: St. Constantine and Elena (1834), St. Atanas (1824), St. Gjorgji (1842), St. Nikodin (1878), St. Ilija (1879), St. Leontius in Vodoca (1018), St. Mother of God Eleusa from 1080 in the village of Veljusa, as well as many other values present in this region.

One of the oldest national events in Strumica is the Strumica Carnival, which is a member of FECC (The Federation of European Carnival Cities), a festival that successfully fits into the global family of the most famous traditional events. Important are both the International Art Colony and the Risto Shishkov Chamber Theatre Festival.

**Catering.** Bansko Spa is an integral part of the Hotel Car Samoil, which has accommodation facilities, a restaurant, conference room, parking site and offers additional services.

## DEBAR SPAS (KOSOVRASTI AND BANJISHTE)

**Historical development.** It is known that the people since ancient times valued especially the thermal springs in Banjishte. Their hot water was considered magic-healing, and they often would seek treatment in it for their illness. The first written record of the spa in the village of Banjishte occurred at the end of the 17th century. It is a limestone plaque that was placed in the lower pool and reads in old Ottoman letters: «Benefactor and Worshiper Hadji Muhyiddin, son of Numan Effendi of the Oruch Zode family 1211 (between 7-7-1796 and 26-6-1797)”. This shows that the two old pools that still exist nowadays and are in use, were raised by Haji Muhyiddin between 1796 and 1797. Since then, until the end of Turkish rule in 1912, nothing else has been constructed there. Up to until the liberation from the Turks, the spa was mainly used by the local population and little by Debar inhabitants.



Profile of the spa resort	Debar Spas (Kosovrasti and Banjishte)
<b>Accommodation capacity</b>	213 rooms, 522 beds
<b>Conference Room</b>	✓
<b>Restaurant</b>	130 tables, 550 seats
<b>Cooperation with the Health Insurance Fund of RNM</b>	✓
<b>Medical Centre</b>	✓
<b>Diagnose mostly treated in the spa resort</b>	Spondylosis, rheumatic diseases, post-operative rehabilitation, other diseases of the nervous and locomotor system, as well as orthopedic diseases and trauma states.
<b>Basic spa services (Bathing)</b>	✓
<b>Additional SPA services</b>	✓
<b>Capacity of springs (l/sec)</b>	50
<b>Water temperature (°C)</b>	40
<b>Parking site (capacity/vehicles)</b>	90
<b>Additional activities</b>	Organised excursions and events

The other spa, Kosovrasti, during that period and up to 1912 almost did not exist at all. There were not any attempts invested to arrange the pools, or to construct the accommodation facilities in these springs. In fact, there were primitive pools, but they were under open skies, surrounded only by plain raw stone, and because they were located near the Radika River, they would be flooded during the periods of high waters. Spas experienced significant development between

the two world wars in terms of landscaping and constructing the accommodation facilities. It is known that in the period between the two world wars, pools had been leased.

In 1925, the first hotel with 10 rooms and about 30 beds was built in Debar Spas. The hotel had a convenient location and was positioned on the right side of Banjishka River through the current larger bridge, that is, the former hanging wooden bridge, which connects the middle part of the village. The hotel was long used by the owner, and immediately after the liberation and following the expropriation, it was handed over to the farmers' cooperative from the village of Banjishte. For some time, the cooperative used it as a hotel under the name "Krcin", but right after the cooperative affiliated to the Debar farmers' cooperative, it was demolished and sold as construction material in 1950.

In 1930, the adaptation of private houses in Banjishte began more noticeably, in order to offer those to visitors, who massively begun to arrive from other cities and villages, especially from Struga, Ohrid and Kichevo regions, and later from Prilep and Bitola. Unfurnished rooms were often rented out in private households. The guests would carry along bed linen and stayed in rooms with family or in groups, in very poor conditions. Such issuance of unfurnished rooms lasted until 1960, and then all households began to introduce furnished rooms and offered them to visitors. In 1981, 32 households were renting more than 260 beds.

**Traffic connection.** Debar Spas, Banjishte and Kosovrasti Spa are located at the foot of Krcin Mountain, in immediate vicinity of Debar. Kosovrasti Spa is located 5 km north of Debar on the shore of the artificial Spilje Lake. The hotel facilities are built adjacent to the thermal spring on the right side of Radika River, at an altitude of 590 m. The spa in Banjishte is located on a small elevation at the foot of the forested Krcin Mountain. The spa is located 4 km northwest of the town where Banjishka River leaves the Krcin Mountain and enters the Debar Valley at an altitude of 870 m. Both spas have a good geographical position. Large bulk sediments are located where the water from Kosovrati Spa flows into Radika. Spilje Lake gives this spa a special highlight.

Debar Spas in the north-east are connected to Mavrovo and Gostivar, and through Tetovo to Skopje. In the south they are connected to Struga, Ohrid and Bitola. Modernisation of this highway and construction of access roads to the spas have facilitated their accessibility. A new road is the route through Peshkopia to Tirana. Through the Blato border crossing and the Republic of Albania, it leads to Italy. The traffic connection is enriched with both Skopje (150 km) and Ohrid (70 km) airports, which is another positive traffic connection with Debar Spas.

**Natural values.** Krcin Mountain in the immediate vicinity, followed by Korab and Bistra, as an integral part of the Mavrovo National Park, gives Debar Spas special natural conditions for tourism development. The wildlife here occupies a key place for tourism development, and the abundance of fish stocks in Debar Lake and Radika River is attractive to visitors.

**Hydrography characteristics.** The largest amount of water comes from the Kosovrasti spring. Its energy saving is 68.8 l / sec. Second in strength (51 l / sec) is the Nova Kaptaza spring near to Banjishte Spa. The lowest temperature of 36 ° C is in the Upper Pool in the village of Banjishte, and the highest in the Kosovrasti spring of 48°C. The chemical composition of the waters in Debar Spas show that they mostly contain sulphates, followed by bicarbonates and chlorides.

**Healing prospects.** The healing effect of Banjishte spring results in the use of water for bathing and drinking purposes. Bathing healing treatments include:

- » All types of subacute and chronic inflammatory rheumatism;
- » Degenerative rheumatism of all joints and spine rheumatism;
- » Rheumatic fever in the period of sedation with joint pain and without heart failure;
- » All forms of rheumatic disease (especially sciatica);
- » All extra-articular rheumatism;



- » Muscle weakness following joint trauma and bone fractures;
- » Partial stiffening of the joints;
- » Condition of polio suffered;
- » Chronic ovarian inflammation as well as other gynaecological diseases;
- » Primary and secondary infertility and
- » Skin diseases.

The following diseases are cured by drinking the water:

- » Long-term gastric disease with increased acidity and decreased acidity;
- » Long-term inflammation of the stomach;
- » Ulcer of the duodenum and stomach;
- » Long-term constipation;
- » Long-term large intestine disease;
- » Long-term disease of the gallbladder with sand and smaller stone;
- » The condition after suffering infectious jaundice;
- » Sand and smaller stone in the urinary tract;
- » Long-term inflammation of the urinary tract;
- » Long-term inflammation of the respiratory organs;
- » Pulmonary disease;
- » Disease of the joints due to increased urinal acid;
- » Mild forms of diabetes;
- » Anaemia due to lack of iron.

The following diseases are successfully cured in Kosovrasti Spa:

- » Subacute and chronic rheumatism;
- » Rheumatism in the joints and spine;
- » Degenerative and deformative rheumatism;
- » All types of sciatica and neurology;
- » Gastritis with increased and decreased acid and ulcer in the stomach;
- » Gallbladder and kidney tract diseases;
- » Many types of gynaecological diseases;
- » Diverse types of skin diseases.

**Cultural values and events.** There are seven mosques in the city of Debar, and there are 43 mosques in its surroundings. There are the following mosques in the city: Hunkar, Tekke, Bayram Bey, Budulec, Namazyar, Konjare, Venec and Saat Kula.

One kilometre east of Debar, in the village of Rajcica, is the monastery of St. Gjorgji the Victorious. It is interesting to note that the monastery is manually made of mitre (a crown, part of the Orthodox bishops' garments) worn by the bishops of the MOC, as well as bishops in Bulgaria, Serbia, Greece, Romania, and the Ecumenical Patriarchate in Constantinople. Near to the spa resorts, there is the monastery of St. Jovan Bigorski, a rare example of anthropogenic tourist motif. It can

independently attract the attention of the tourist mass. It is located in the beautiful valley of the picturesque river Radika River.

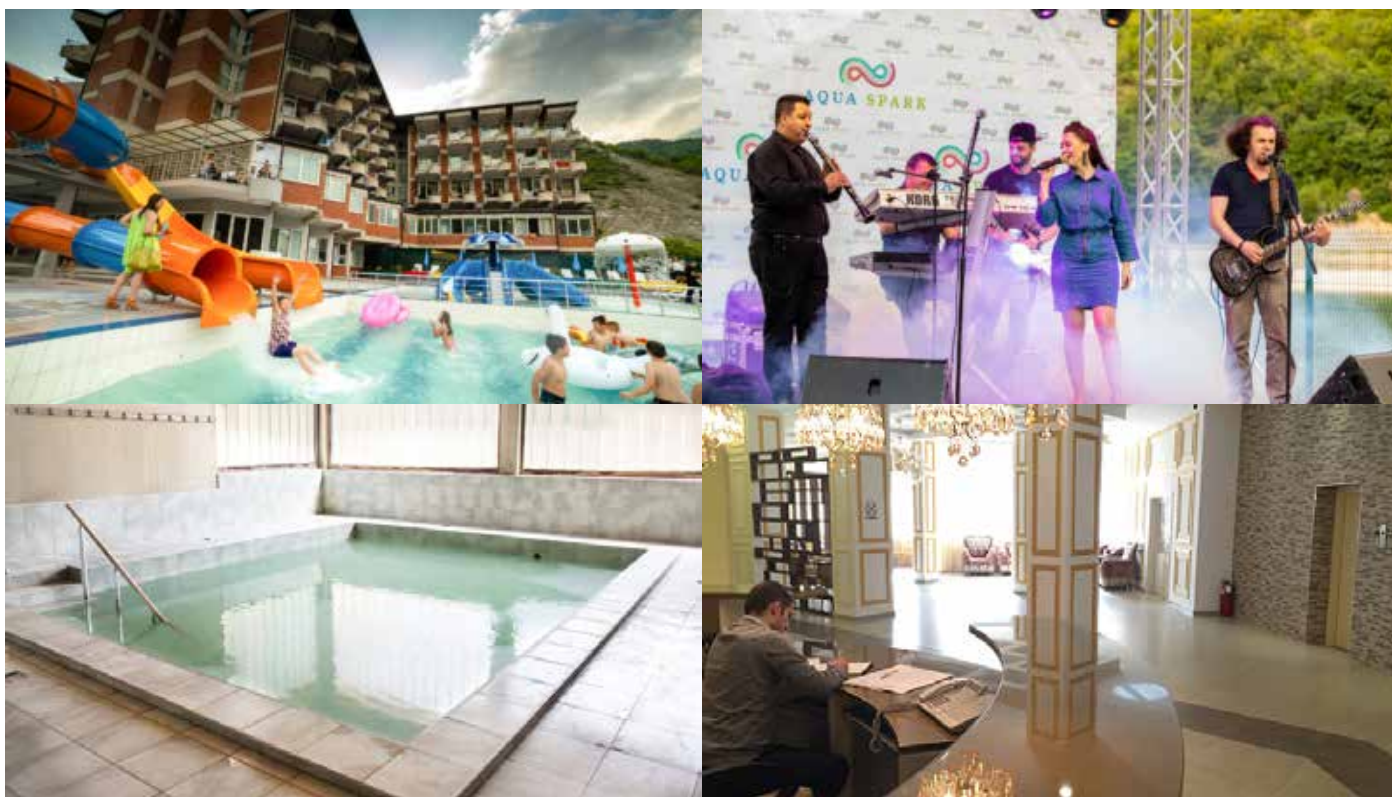
We would distinguish the following events: The Festival “Pesnite na Penestija” (Penestija songs), Days of Goce, Days of Sheep and Goat Breeders and Galichnik Wedding.

**Catering.** We shall mention the hotels as part of the spas’ accommodation capacities. The first hotel, Hotel & Spa Banjishte is ideal place for those who want to relax and enjoy the clean mountain air, the natural thermal mineral spring with optimum temperature for the human body and the delicious food. Due to its respect for history and tradition, in order not to disturb this timeless beauty and harmony that seems to have reached its maximum in this sacred place, Banishte Hotel has its traditional architecture from the outside, but the interior has a luxurious interior, offering top standards of accommodation and hotel services, which can meet a variety of guests’ needs. At an altitude of 880 meters and surrounded by beautiful nature, it is today a modern medical centre, where the healing effects of thermal mineral water, combined with the most contemporary medical methods help cure and treat dozens of diseases. The hotel has a professional medical and hotel team that takes care of the guests while staying in this hotel in the best feasible way. Banishte has 122 rooms available, with a total capacity of over 300 people. The rooms are grouped into several categories, depending on the services they offer, and the most modern are the four suites. The spa also has a restaurant with a capacity to accommodate up to 400 people, which also has a summer terrace and a children and adult entertainment corner. The hotel has two pools with thermal mineral water, fitness room, massage room, beauty centre, free Wi-Fi internet, beautiful park, hiking trails and parking site for cars and buses.



The second hotel, Hotel & Spa Kosovrasti is a modern hotel with 72 modern rooms, all viewing Debar Lake. Surrounded by beautiful nature, this hotel is currently the only “green” hotel in the country and the region, taking care of nature, and for its heating needs, it uses only solar and geothermal energy from the thermal mineral water itself. The mountainous surroundings, the lake, the Radika River canyon, the hiking trails, are the most suitable place for relaxing walks, as well as for those seeking adventure and challenges. Health-rich water for decades has been great for those in need of spa treatment. The hotel has a professional medical team that applies the old and traditional natural, as well as new scientific knowledge to perform therapeutic treatments, monitors the achieved results and compares them with the planned ones. Particular attention is

paid to motivating the patients for their continuous active participation in the performance of all envisaged activities. The hotel has two indoor pools and one outdoor, restaurant with terrace, park, parking site, football field and more. The hotel also includes Villa Kosovrasti with 11 rooms which is in the immediate vicinity of the hotel itself. The spa also has an outdoor aqua park that uses mineral water. Bungalows with separate thermal water pools are currently under construction.





## KATLANOVSKA SPA



Profile of the spa resort	Katlanovska Spa
<b>Accommodation capacity</b>	108 rooms, 227 beds
<b>Conference Room</b>	✓
<b>Restaurant</b>	41 tables, 125 seats
<b>Cooperation with the Health Insurance Fund of RNM</b>	✓
<b>Medical Centre</b>	✓
<b>Diagnose mostly treated in the spa resort</b>	Z96.6 Presence of an implant (in medical rehab as extended hospital treatment) and M51 Radiculopathy lumbar disc disease (in specialist-consultative health care)
<b>Basic spa services (Bathing)</b>	✓
<b>Additional SPA services</b>	✓
<b>Capacity of springs (l/sec)</b>	5,6
<b>Water temperature (°C)</b>	56
<b>Parking site (capacity/vehicles)</b>	80
<b>Additional activities</b>	Organised events

**Historic development.** Katlanovska Spa dates back to ancient times, from the time of the Roman Empire. The foundations of the old building, as well as the ancient Roman currency, tell us that the Romans built several pools to utilise the water. During the Turkish rule, Katlanovska Spa was a healing place for all the diseased persons. The Turks renovated the Roman pools, and built a new pool, with 12 baths and various other buildings adjacent to the mineral springs and that is how they would get treated.

**Traffic connection.** Katlanovska Spa is located near the village of Katlanovo, where Pchinja River deeply sinks its riverbed into the Spa's Hill. To the west of the spa the Skopje Valley extends, and to the east the Black Peak (758 m) rises. The spa is located on the right side, near to Pchinja River, at 230 m above sea level. The traffic connection of Katlanovska Spa is very good. Located in the immediate vicinity of the E75 highway, which is only 2 km south of it, it is possible to be reached quickly, comfortably and at all times from all nearby centres. This is possible from the Skopje-Veles-Gevgelija route, or Kumanovo and Macedonian-Serbian border.



**Natural values.** Katlanovska Spa is a complex of recreational spa healing place. What is also important for the guests is Pcinja River, with its natural beauty and the wonderful canyon. The gorgeous nature surrounding it, the high tops with diverse forest are a superior quality. The abundant and diverse flora and fauna in Katlanovska spa and its surrounding, particularly around Pcinja River, is mostly represented. Here you may find all kinds of deciduous woods, such as: oak tree, hazel wood, hornbeam, dogwood, mackerel, and elm tree. In the Katlanovo Swamp there are grass plants, such as reeds and some other grasses. The most common of the fauna is the small game.

**Hydrography characteristics.** Given the content of hydrogen sulphur and the temperature, this water belongs to the order of alkaline, earth-alkaline, and sulfuric hyperthermal waters.

**Healing prospects.** The following diseases are successfully cured in Katlanovska Spa:

- » Distinct types of rheumatic diseases;
- » Diseases of the stomach and intestines;
- » Diseases of the female genitals;
- » Nerve diseases;
- » Chronic kidney and urinary tract diseases;
- » Skin diseases;
- » Blood vessels diseases;
- » Metabolism diseases;
- » Some respiratory tract diseases;
- » Cardiovascular diseases.

**Cultural values and manifestations.** There are more anthropogenic tourist values in this area. The spa was used even during Turkish rule. Thus, a plate from that time (1898) was unearthed on the wall of the old bath with the following Turkish-Arabic inscription: «Memorialise the benefits of this warm water, let the water be undried for the world that is under development and construction. It has been running through the stone ever since God blessed it.» Katlanovska Spa located near



Skopje, a city whose numerous and varied events are very important for this spa resorts. Various events in Skopje contribute that the guests of this spa attend those collectively or individually, which is one of the positive elements for enriching and utilising the guests' free time.



**Catering.** The Katlanovska Spa has accommodation facilities, a restaurant for the staying guests, as well as a separate restaurant with a capacity of 30 seats for outside visitors and guests.

Katlanovska Spa is a contemporary and modern spa resort with a large pool with thermal mineral water, a private pool with thermal mineral water, individual baths with thermal mineral water, Finnish sauna, oxygen spa capsule. The spa resort performs relax body massage, manual lymphatic drainage, royal massage, medical massage, Katlanovska spa mineral pilling and various body and face treatments with high quality professional cosmetics. Thermal mineral water in its composition is a real-world rarity. It has a high percentage of minerals and is one of the most beautiful waters in the Balkans, Europe, and the World.





## NEGORSKA SPA



Profile of the spa resort	Negorska Spa
<b>Accommodation capacity</b>	134 rooms, 288 beds
<b>Conference Room</b>	✓
<b>Restaurant</b>	390 seats
<b>Cooperation with the Health Insurance Fund of RNM</b>	✓
<b>Medical Centre</b>	✓
<b>Diagnose mostly treated in the spa resort</b>	Knee Arthrosis, Discopathy and Spondylosis
<b>Basic spa services (Bathing)</b>	✓
<b>Additional SPA services</b>	✓
<b>Capacity of springs (l/sec)</b>	8
<b>Water temperature (°C)</b>	42
<b>Parking site (capacity/vehicles)</b>	90
<b>Additional activities</b>	Organised events

**Historic development.** Unlike some spas in the Republic of North Macedonia, such as Katlanovska, Strumica, and others, which are known to have been used by the Romans, the Negorci thermal mineral springs started to be used only in recent times. The first data on this thermal mineral spring is given by the famous Yugoslav geographer Jovan Cvijic who visited this area in 1898. In 1902 Robert Hereเนส wrote about it. However, both indicate that there are only thermal springs here, but no facilities that will enable their usage. The next year of 1903, the commander of a stronger garrison in Gevgelija, Shukri-Pasha, built a spa at the stronger spring, or a two-pool building and rest rooms. The pools still exist today, one of which is larger and has a round shape of 2.60 metres and a depth of 1.20 meters, and the second one is smaller and has a cube shape. The first was used for bathing by Shukri-Pasha's women, and the second was used for bathing only by Shukri-Pasha. There were rooms above the pools, and there was a spacious terrace designed for pasha's teferic (leisure).

**Traffic connection.** The traffic connection of the spa is an essential factor for tourism development. Since the Negorska Spa is located in the immediate vicinity of the E75 highway, it is directly connected to this road. It is a great precondition for accelerated development of international, and especially transit tourism. There is a high-quality asphalt road heading from Gevgelija to the spa, which further heads to the neighbouring villages Negorci and Prdejci. There is a regular city bus service running on this route.

**Natural values.** Negorska Spa is located in Gevgelija Valley, about 4 km from Gevgelija. The spa is located at the foot of Kozuf Mountain, 60 meters above sea level. The spa complex covers an area of 36 hectares, fully wooded, greened, and relatively well landscaped. Kozuf Mountain (Dautica 2123 m), which belongs to the high mountains, is located near to this spa, and offers opportunities for development of picnic-recreational activities. Beautiful landscapes and lush vegetation make for pleasant walks. There is a ski resort on Kozuf Mountain, and there is the Smrdliva Voda picnic area. The spa resort has a variety of exotic trees and flowers. All spa facilities (mineral springs, hotels, restaurants) are located in a forest park. The most widespread and most common is black ash tree, which grows up to 30 meters high.

**Hydrography characteristics.** The spring capacity of Negorska Spa is 1.8 l/s, and the water temperature is 40°C. As per its chemical and physical properties, the water in this bath belongs to the category of homothermic poorly mineralised poorly radioactive waters. The main chemical composition of water is sodium sulphate.

**Healing prospects.** The mineral waters of Negorska Spa are known for treating many diseases, including:

- » Diseases of the locomotor system;
- » Rheumatic fever condition;
- » Chronic inflammatory rheumatism;
- » Chronic evolutionary polyarthritis;
- » Bechterew's disease - early stage;
- » Degenerative rheumatism (arthrosis, spondylosis);
- » Extra articular rheumatism;
- » Consequences of trauma and military injuries;
- » Urinary diathesis in more severe exacerbations;
- » Cardiovascular diseases;
- » All forms of coronary artery disease;
- » Arterial hypertension in a labile and light form;
- » Recovalescence of myocarditis of rheumatic and other origin;
- » Recovalescence of rheumatic endocarditis;
- » Neurological diseases;
- » Neuralgia and polyneuritis;
- » Consequences of poliomyelitis;
- » Gynaecological diseases;
- » Inflammatory processes of a non-specific nature in a calm state;
- » Ovarian dysfunction followed by hypoplasia of the genital organs and abnormal menstruation;
- » Certain forms of sterility, primarily of inflammatory and single-celled origin;

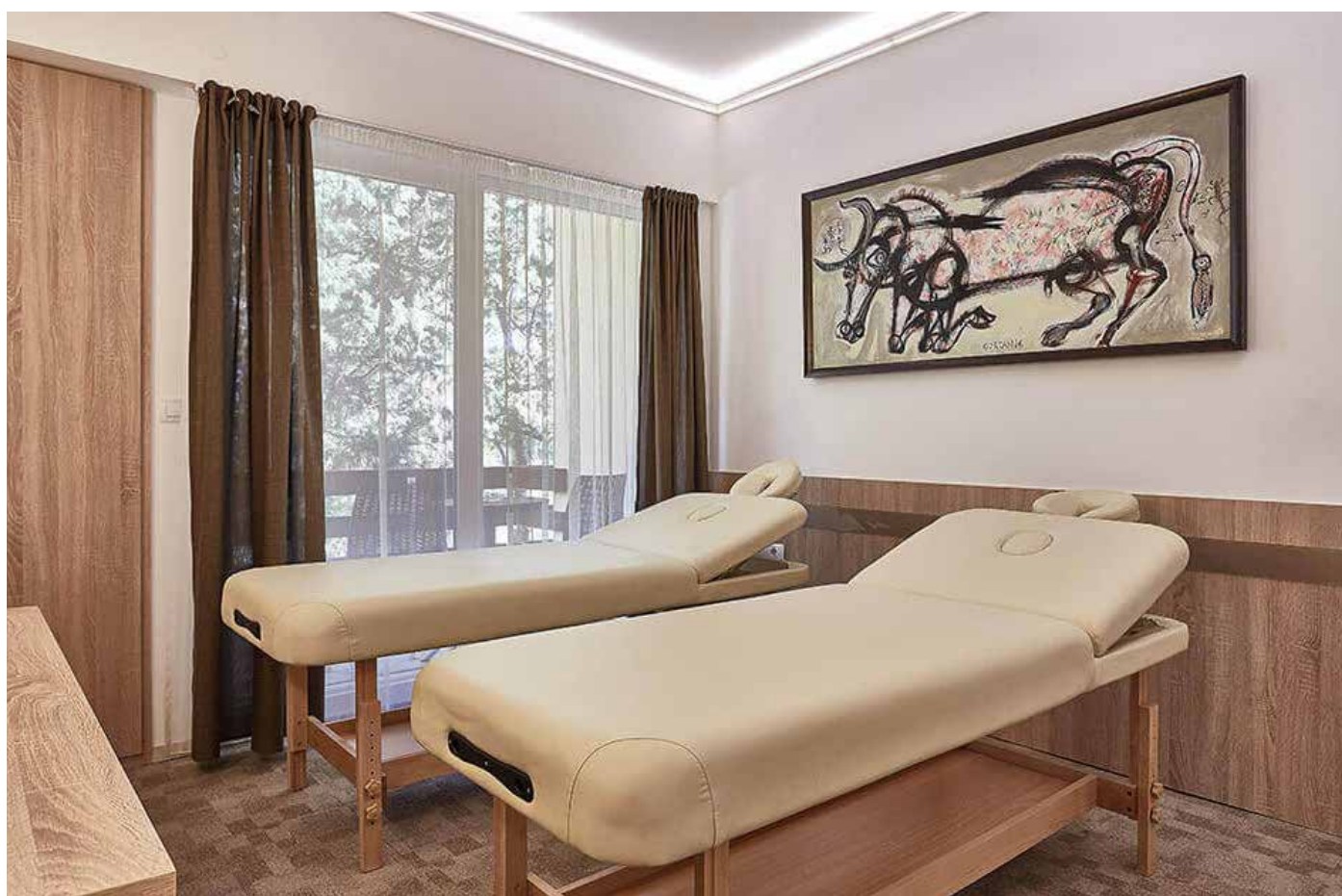


- » Respiratory diseases;
- » Chronic bronchitis - tracheitis and laryngitis;
- » Milder forms of bronchial asthma;
- » Gastrointestinal diseases;
- » Chronic gastritis;
- » Stomach ulcer and duodenum;
- » Gallbladder inflammation, and
- » Large intestine inflammation.

About 500 meters south of the mineral springs, there is a mineral swamp (mod) on a larger surface. It is unique in our country and is successfully used in the wellness spa complex.

**Cultural values and events.** Adjacent to the spa, in the village of Negorci, there is the well-maintained church St. Atanas. As important we would single out the pool in the spa called Shukri-Pasha's Pool, which dates back to the XIX century and was built in the style of Turkish bath and attracts the attention and interest of the guests. 15km from Negorska Spa and up to the highway in the village of Marvinci lies a fortress town of an ancient history, but in the process of excavation and examination. In the future it shall remain to be an attractive place to visit. The archaeological site of Vardarski Rid near to Gevgelija dates back to the 5th century BCE. It is a site that is a large ancient city with many architectural buildings of different time periods. They were raised during the entire first millennium BCE. On the way to the site of Smrdliva Voda on Kozuf Mountain is the church of St. Ilija, in the village of Konsko, famous for its beautiful frescoes.

Tourists are recommended events organised in the surrounding places. Such are: Dojran handshakes, Children Festival Kalinka, in which, part of the participants are invited to visit the spa, then International Dog Exhibitions, Smokvijada and Valandovo Folk Festival.





**Catering.** The spas dispose of 2 restaurants and summer garden, whereby visitors may taste healthy food and Macedonia's south cuisine specialities. One of the restaurants is within the summer garden and is of commercial type (A la carte). The other restaurant is within the hotels, and this restaurant is within boarding – where guests are served breakfast, lunch, and dinner on board overnight stays. This restaurant has a capacity for receiving 250 guests. Visitors to restaurants and summer gardens can enjoy the pleasant music of various Macedonian bends and other cultural and folk performances and events.

The spa complex Negorski Spas offers accommodation in 3 hotels:

- » Hotel Jasen with accommodation capacity of 136 - 142 persons in 68 rooms.
- » Hotel Ilinden with accommodation capacity of 86 - 88 persons in 40 rooms, and
- » Hotel Bozhur with accommodation capacity of 56 - 58 persons in 26 rooms.



Quality accommodation ensures a pleasant stay, both for those guests who need unique thermal-mineral water, physical therapies, and for those in need of rest and recreation. The three hotels are of varying degrees of quality and category.

The spa complex also has three football fields, jogging and hiking trails in the ash tree woods, cycling trails and a gym.







## 4.2. Spa resorts not offering spa services

Spa resorts that not offering spa services include Kezhovica, Kumanovska and Kocanska Spas (village of Banje, municipality of Cheshinovo-Obleshevo).

### KEZHOVICA SPA



Profile of the spa resort	Kezhovica
Accommodation capacity	✓
Conference Room	/
Restaurant	/
Cooperation with the Health Insurance Fund of RNM	/
Medical Centre	/
Diagnose mostly treated in the spa resort	/
Basic spa services (Bathing)	✓
Additional SPA services	/
Capacity of springs (l/sec)	36
Water temperature (°C)	64
Parking site (capacity/vehicles)	20
Additional activities	/

**Historic development.** There are traditions and legends telling that the discovery of mineral waters comes from the shepherd Kezho who had wounds to his body. Digging around the spa, he discovered hot water and began to wash his wounds. They were healed in a while. Hence the name of this spa is Kezhovica. At the time of the Turkish Empire, surface springs were used on the coast and in the riverbed of Bregalnica River, outdoor, enclosed only with canvas to serve as



compartment between the women's and men's space. They were called canvas hammams (baths). In addition to bathing, the population used mineral water for washing and whitening of canvases. They are still traditionally used today by the population of Novo Selo.

During the Kingdom of Yugoslavia, a small capacity town bath was built for the needs of the population, and during the Bulgarian occupation a new bath was constructed and called «Bulgarian Bath», in which the town spa was built. After the liberation, the bath was expanded. In 1951, a four-room ground floor building with 10 beds for guests to use for spa treatment and recreation was constructed. In the 1970's of the past century new rooms were upgraded and these rooms are renovated nowadays.

**Traffic connection.** Kezhovica Spa is located southwest of Shtip in the immediate vicinity of the Novo Selo region, on the right bank of Bregalnica River. The traffic connection of Kezhovica Spa is relatively good. It is connected with the main communication Veles - Strumica - Kocani - Shtip, as well as the railway line Veles - Shtip - Kocani. A regular bus service runs on this route.

**Natural values.** In the area of Kezhovica Spa, there are three clearly distinguished natural units such as: high flat area, Ovce Pole Plain and Bregalnica River Valley. Plachkovica Mountain with its



height occupies a prominent place for spa tourism, in the natural auxiliary elements of Kezhovica Spa. The caves on Plachkovica Mountain have not been fully explored, but they are nonetheless very attractive for visiting tourists. Most famous cave is Kjup and it is the most accessible. The most beautiful is the Great Cave with a length of 600 m, as well as Ajduchka Cave and Turtel Cave.

**Hydrography characteristics.** The water energy saving of both springs reaches 36 l/sec. The water temperature is 64°C, meaning that it belongs to the group of hyperthermal waters.



**Healing prospects.** Thermal mineral springs of the spa resort of Kezhovica are largely efficient in the cure of:

- » Neurological diseases and sciatica;
- » Disruption of the nervous vegetative system;
- » Rheumatism;
- » Disease of the joints;
- » Diabetes;
- » GIHT disease;
- » Allergic diseases and other skin infections;
- » Chronic respiratory diseases;
- » Bronchial asthma;
- » Infertility, reduced potential of both sexes and
- » Atherosclerosis and hypertension.

**Cultural values and events.** Of the cultural values important for Kezhovica Spa, we shall highlight the most vital ones. The Isar archaeological site is a fortress town located on a dominant elevation between Bregalnica and Otinja rivers. It is a fortress originating from the second half of the 13th and the first half of the 14th century, surrounded by a defensive wall with a main entrance on the east side. Before 1332, on the slopes of Isar under the walls of the fortress or, more precisely, at the entrance of the fortress, the church was constructed of St. Archangel Michael, as one of the main patrons of the city. In 1341, a church dedicated to St. Nikola, known in literature as the Siphian Church. The Bezisten was built before 1662 and served as the main bazaar. The construction of the Church Ascension of St. Mother of God in Novo Selo-Shtip, was initiated by the famous builder Andreja Damjanov in 1836 and was completed in 1850. At the foot of Plachkovica Mountain, in the



area of Upper Kozjak near to Kozjachka River, the old town of Bargala is located. It dates back to the 5th to the 6th century. It has so far unearthed the episcopium of the city with several objects: an episcopal basilica, an episcopal residence and other rich architectural decorative plastic.

Most noteworthy events organised in the city of Shtip are Makfest, Shtip Cultural Summer, Pastrmalijada, etc.



**Catering.** Kezhovica Spa resort is managed by the Public Enterprise of the city of Shtip, named Isar. The spa resort disposes of 10 rooms with the capacity of 30 beds. The spa resorts charges entry tickets to the spa, as well as overnight stay and tourist tax. Within the spa resort, there is a small catering facility with a kitchen and capacity of 20 seats, which works seasonally and with shortened working hours, and visitors may prepare meals on their own. There is a machine for purchasing snacks, hot and soft drinks.





## KUMANOVSKA SPA



Profile of the spa resort	Kumanovska Spa
Accommodation capacity	/
Conference Room	/
Restaurant	/
Cooperation with the Health Insurance Fund of RNM	/
Medical Centre	/
Diagnose mostly treated in the spa resort	/
Basic spa services (Bathing)	✓
Additional SPA services	/
Capacity of springs (l/sec)	2,5
Water temperature (°C)	30
Parking site (capacity/vehicles)	10
Additional activities	/

**Historic development.** Kumanovska Spa dates back to Turkish Empire. But, there are not any particular data on when the spring was discovered and when did it commence its spa operation. The village of Proevci was ownership of beys, and the local population would work as farmers at the beys' properties. In the aftermath of Balkan wars, the municipality of Kumanovo has built a more contemporary swimming pool for the guests and for recreational purposes.

**Traffic connection.** Kumanovska Spa is located 3km southeast of Kumanovo, near to the village of Proevci. The site on which the thermal mineral spring of Kumanovska River emerges, over which steeply rises Proevsko Hill. The Kumanovo Spa is located near to the E-75 highway and the Athens-Skopje-Belgrade International Railway. The proximity of the Skopje-Kumanovo-Kriva Palanka road route through Bulgaria links it with Turkey. Then the connection to the eastern part of the country

through Sveti Nikole, and the proximity of the Kumanovo Spa International Airport Skopje give it many positive features.

**Natural values.** The Kumanovska Spa springs are located along the stream of Kumanovska River, which flows into Pcinja River. Beside these natural tourism values, Kumanovska Spa is characterised by two beautiful artificial lakes, Glazhanjsko Lake and Lipkovsko Lake. These lakes are vital for the development of the spa tourism, as they have beautiful nature, with abundant vegetation, forest, and abundance of various fish breeds, and they enable sunbathing and fishing.

**Hydrography characteristics.** According to the established ionic composition, the mineral water from the region of Proevci belongs to the group of leading groups of mineral waters in the world and it is called the Queen of waters. The amount of water, which was measured on 4 occasions, is about 2.5 l / sec. The water has a temperature of 28°C in the tap and 30.4°C in the bath.



**Healing prospects.** Kumanovska Spa helps the cure of the following diseases:

- » Nerve diseases,
- » Diseases of the digestive organs,
- » Diabetes,
- » Gallbladder disease,
- » Sand in the kidneys and
- » Diarrhoea.

**Cultural values and events.** The Matejce Monastery is 1,005 metres above sea level, situated in the southeast of Skopska Crna Gora. It is at 17 km distance from Kumanovo, it is presently abandoned, and activities were commenced for asphaltting the road leading to it. St. Gjorgji Church in Staro Nagorichane is picturesque, hence attracting special attention. The antique locality in the village of Lopate is much valuable, as well as recently constructed churches and mosques, hence, those may be included in the cultural offer of Kumanovska Spa. Interesting is the data on the mummies from Lipkovo, discovered during the construction of the artificial accumulations. Events



significant to the spa resort are Tumba Fest – festival of comic songs, Comedy Days, Sub-Kozjak Poetry Meetings, and the International Bicycling Competition, which is organised in Kumanovo annually, then April Literature Meetings and Kumanovo Evenings.

**Catering.** Adjacent to the spa, there are villas for accommodation, restaurants, and entertainment facilities such as a children's park. A modern spa resort is currently under construction, with indoor and outdoor pools and accommodation facilities, as well as additional spa services. In the past, mineral water was used for the needs of the Ku-Ba Hotel near to the spa and Olympic-length pool. The hotel is currently not operational.





## KOCANSKA SPA (VILLAGE OF BANJE)



Profile of the spa resort	Kocanska Spa (village of Banje, municipality of Cheshinovo-Obleshevo)
Accommodation capacity	/
Conference Room	/
Restaurant	/
Cooperation with the Health Insurance Fund of RNM	/
Medical Centre	/
Diagnose mostly treated in the spa resort	/
Basic spa services (Bathing)	/
Additional SPA services	/
Capacity of springs (l/sec)	65
Water temperature (°C)	64
Parking site (capacity/vehicles)	/
Additional activities	/

**Historic development.** Although this spa does not use its potentials today, it should be noted that it is a spa used by the Romans. During the Ottoman rule in our region, the spa was also used by the Turks, as mentioned by the traveller Evliya Çelebi back in 1662. This means that the spa has a long tradition and that it has noteworthy features in the tourist attraction. Until the Second World War, the spa had only one pool used by both, men, and women, and after the war, another pool and accommodation facility were built. Currently, the spa is not open to visitors and is managed by the municipality of Cheshinovo-Obleshevo.

**Traffic connection.** The village of Banje is located in the eastern part of the Republic of Macedonia, 7 km from Kocani on the right side of the highway Kocani-Shtip. It is located at the foot of Osogovo Mountains and lies on the last branches of the hills of these mountains, which descend slightly towards the valley at an altitude of 340 m above the sea level. On the east side its neighbouring

the village Trkanje, and on the west side the village of Spanchevo, on the south the village is bordered by fertile rice fields in the Kocani Valley, which is closed by Plachkovica Mountain. Kocani Bath is located near the highway connecting with Shtip (30 km) and Veles (70 km), and then exits on the Skopje-Gevgelija highway, that is, this spa is connected to Central Macedonia. To the east, the spa is connected to Vinica (10 km), Makedonska Kamenica (30 km), Delcevo (55 km), Berovo (60 km) and the Bulgarian border (65 km), and to the west it is connected to Probishtip (36 km) and Kratovo (48 km). The existing railway, built in 1926, also has a traffic significance. Through this railway line the spa is connected to Shtip-Veles-Skopje.

**Natural values.** Kocanska Spa is rich in flora and fauna. In its vicinity, to the north are Osogovo Mountains (Carev Vrv, 2,085 above sea level), where diverse varieties of deciduous forests may be seen, such as: oak tree, elm tree, hornbeam, ash tree, hazel wood and alike. Rice and agricultural varieties are grown in the south, in the Kocani Valley. The wildlife is represented by a variety of game such as deer, mouflon, wild boar, and others. Landmark of this region is the stork bird, and the region has made two theme parks for visitors to honour the storks.

**Hydrography characteristics.** The springs in Kocanska Spa are characterised by specific hydrologic, that is, chemical - mineralogical and thermal properties, as well as by the amount of water that springs in this area. The amount of water in the spa was long unsatisfactory. With drillings performed, the amount of thermal mineral water amounts over 65 litres per second. The water temperature is 64°C, which means that it is a very favourable value. It allows for use for spa purposes, as it is hyperthermal water. By chemical composition, the bath belongs to the group of poorly mineralised thermal waters. It is predominated by hydro carbonates, poor in alkaline and low in radioactivity level. Most of the cations contain sodium, potassium, calcium, and magnesium, and of the anions chlorine, sulphates, hydro carbonates, silicon-oxides, aluminium-oxides, iron oxide and others. It also contains rare minerals, such as lithium, caesium, rubidium and the like.



**Healing prospects.** The Kocanska Spa water is used to cure the following diseases:

- » All types of rheumatic diseases;
- » Diseases of the gallbladder tract and gallbladder;
- » Urethra diseases;



- » Gynaecological diseases;
- » Inflammation of nerves;
- » Diseases of the gastrointestinal tract and duodenum;
- » Conditions following injuries to the bone system and other diseases.

**Cultural values and events.** There are many anthropogenic tourist resources in the immediate vicinity of the spa, such as St. Gjorgji Church in Kocani; St. Panteleimon Monastery Complex, built in the XIX century, located in the village of Pantelej, at a distance of 12 km from Kocani. Every year on 9 August, there is a church-folk congregation organised, which attracts thousands of visitors; Crkvishte Archaeological Site, located in the village of Morodvis near to Kocani, and containing remains of four churches and valuable objects belonging to diverse cultures, from the time of Justinian I onwards. Cyril and Methodius Brothers, the founders of Slavic literacy from 845-855, staying in the Bregalnica area (Morodvis), they began to spread Christianity in Slavic language. Of immense importance for the development of the Kocani Spa are the manifestation tourist values such as: May Theatre Screens, the Art Colony, and the most famous event of this area - Days of Kocani Rice.

**Catering.** Currently, there are no catering services as the spa is not operational and it does not contain any catering facilities.





### III. MEASURES AND RECOMMENDATIONS FOR FUTURE ACTIVITIES

The study suggests measures and recommendations for future activities related to spa tourism and spa resorts, such as aligning the legislation relating to spa tourism and spa resorts, promotion of spa resorts, potential locations for placement of information boards and road signs and potential locations for new spa resorts provided in the text below.

#### 1. Measures and recommendations for aligning the legislation

Regarding the alignment of the legislation that is directly and indirectly related to the study, there are some shortcomings that should be supplemented in the future.

From the health and economic aspects of the legislation, the following should be amended:

- » Regulation of the status of spa resorts as natural health resorts under the applicable Law on Health Care. This initiative should be implemented by the Spa Group and the Ministry of Health;
- » Prior planning and reporting of spa centers by the Health Fund for medical healing and rehabilitation on the allocation of vouchers to insured persons, which spa centers could create appropriate development policy;
- » Adoption of a Rulebook on the structure of mineral water that differs from the water in the other pools, because the spa centers use healing waters;
- » Regulation of the Tariff Schedule for determining the fees for licenses, concessions for detailed geological explorations and concessions for the exploitation of mineral resources, considering the health activities performed by the spa centers.

On the other hand, arranging the spa resorts should also be integrated in the Law on Tourism Activity and Law on Hospitality Activity. In the countries of the region, natural healing spas besides health facilities are also used as important tourist resorts (spa and wellness centers), because these natural healing spas use a natural factor - mineral waters, for which an appropriate concession is paid, as determined by line authorities. This is considered to be a severe problem for tourist service, which prevents the spas from offering it as a service and further develop it.

#### 2. Measures and recommendations for future promotion of spa resorts

In the study, tourist valorisation of spa resorts in the Republic of North Macedonia took place. The promotion of spa resorts in the country may be done in several manners:

- » International promotion through participation in tourism and spa fairs with joint offer of spa resorts of the country;
- » Promotion of the official website for tourism promotion of the Republic of North Macedonia and the Agency for Promotion and Support to Tourism (APST);
- » Development of promotional materials such as brochures and tourist guides to spa resorts in the country;
- » Regional promotion through membership in regional and continental spa associations; and
- » Local promotion, through the official websites of the municipalities, regions, and spa resorts.

On the other hand, this study that aimed at analysing spa tourism, may be distributed and offered to domestic and foreign investors, who are willing to invest in potential and existing spa resorts, by using electronic media, setting up official websites of the institutions, social networks, dissemination of printed materials during international tourism fairs, international conferences and conventions, business meetings, through international associations and spa tourism associations, embassies and consular offices, etc.

### 3. Potential locations for construction of spa resorts

In the introductory part of the study, it was highlighted that the number of thermal mineral springs in the Republic of North Macedonia is over 60, and those are used for tourism and health-care needs, that is, 8 spa resorts are used.

**Table 17.** Registry of concession contracts for exploitation of mineral resources, 2016

According to the Ministry of Economy's 2016 Exploitation of Mineral Resources Concession Contracts Registry, there are concessions for 15 geothermal and thermal mineral springs in the Republic of North Macedonia. Of these, 4 locations are in the East Region, 4 in the South-East Region, 3 in the North-East region, two in the South-West Region and one in the Skopje and Vardar Regions.

Ord. No.	Type of mineral raw material	Location	Municipality	Region
1	Thermal mineral water	Kisela Voda, v. Mrezicko Rimjanka	Kavadarci	Vardar
2	Thermal mineral water	Banjski Rid - Katlanovo	Petrovec	Skopje
3	Thermal mineral water	v. Dolno Kosovrasti	Debar	South-West
4	Thermal mineral water	v. Banjishte	Debar	South-West
5	Thermal mineral water	Zdravevci (Dobra)	Kratovo	North-East
6	Thermal mineral water	v. Proevce	Kumanovo	North-East
7	Thermal mineral and thermal water	Rudo Pole, v. Strnovec	Staro Nagorichane	North-East
8	Geothermal water	Smokvica	Gevgelija	South-East
9	Geothermal water	v. Bansko	Strumica	South-East
10	Thermal mineral water	Negorski Spas, v. Negorci	Gevgelija	South-East
11	Geothermal water	v. Negorci	Gevgelija	South-East
12	Thermal mineral water	Vinicka Vada	Kocani	East
13	Thermal mineral water	Kezhovica and Ldzi	Shtip	East
14	Geothermal water	Istibanja	Vinica	East
15	Geothermal water	D. Podlog - Banja	Kocani	East

Field surveys for the needs of the Study that should identify potential locations for construction of future spa resorts in the Republic of North Macedonia are as follows:

**Zdravevci.** The spring named Topolovik is located in a clean environment, on the slopes of Osogovo Mountains and forms part of one of the largest geothermal systems in the Republic of North Macedonia – the Zdravevci geothermal system, Kratovo area. This spring is used for bottling Good Water.

**Istibanja.** The village of Istibanja is located on the regional road Kocani – Delcevo. It is situated between the bed of Bregalnica River, distanced 7 kilometres from Vinica and 10 kilometres from Kocani. It is considered a plain district, spread at an altitude of 380 metres. It is known for its thermal springs in the vicinity, as well as for many medicinal herbs in the surroundings.

**Mrezicko.** Thermal springs near the village of Mrezicko have been known since Roman times, and this spring is used for bottling Kozuvcanka. The village is hilly, at an altitude of 500 metres. The village is about 30 km from the municipality of Kavadarci, where it belongs.

**Smokvica.** The village of Smokvica is flat, 90 metres above sea level, and 15 km from the town of Gevgelija. The thermal spring near the village is currently used for heating purposes in greenhouse production.

**Strnovac.** Near the village of Strnovac in the municipality of Staro Nagorichane, just 17 kilometres from the city of Kumanovo, there is a thermal mineral spring, a swimming pool, simple showers, and dressing rooms. There is also a seasonal catering facility in the summertime. Asphaltting the road to the pool itself would increase the visit.

In addition to these potential locations, there are several more in the country that should be further explored (valorised) in the future in terms of their natural and tourism potential and inclusion in spa tourism.





## 4. Potential locations for placement of information boards and road signs

According to the Law on Road Traffic Safety, the Ministry of Transport and Communications in cooperation with the Ministry of Interior has prepared a Rulebook on Traffic Signs, Equipment and Signalisation. According to this Rulebook, tourist signs and other signalling are intended to inform traffic participants of cultural, historical, natural and tourist landmarks and other facilities and contents in settlements.

Regarding tourist road signs intended to lead to spa resorts, there are currently road signs marking Katlanovska and Negorska Spa (set on E75 international highway), as well as signs for Kumanovska Spa (set in the city of Kumanovo), and for Spa in Banje village (municipality of Cheshinovo-Obleshevo), there is a road sign that is placed on the regional road Kocani-Shtip.

Studies for the needs of this study have shown that better road signage and marking of spa resorts in the country is needed, as well as replacement of existing and old plates with new ones.



The recommendation is to put up road signs to the spas in several locations, to mark the access to the spa resorts, such as:

- » Bansko spa
- » Kumanovo spa
- » Kezhovica
- » Kocani spa

**Negorksa spa.** Set up road signaling at the following locations:

- » Signs before turning towards Negorski Spa on local road Gevgelija - Negorci (on both left and right entrances)
- » Sign in Negorci road circle
- » Signs in the vicinity of Prdejci village for commuting immediately after leaving the Friendship Highway

- » Gevgelija signs from exit Friendship Highway to the roundabout on Gevgelija Boulevard to turn right onto Negorski Spa
- » Signs immediately after exit from the Highway Friendship before entering Gevgelija toward Gevgelija Boulevard
- » On the Highway Friendship before entering Gevgelija on the left and right
- » On the Highway Friendship in front of village Prcejci on the left and right
- » At the Highway Friendship near the village Smokvica on the direction Skopje-Gevgelija and at the entrance to the highway
- » On the Highway Friendship on the road from Strumica, Valandovo to Gevgelija
- » On the Highway Friendship near Veles and Demir Kapija on the route Skopje - Gevgelija

**Katlanovo Bath.** Installation of road signaling at the following locations: Kumanovo, Miladinovci junction, at the entrances to Skopje.

**Debar spas.** Installation of road signaling on the following locations: Kafasan Border Crossing to Struga, Blato Border Crossing to Debar, Ohrid-Stuga Road, Gostivar-Mavrovo Road.

Improvement of road signaling would contribute to increased attendance, promotion of spa centers and better navigation of space by visitors, primarily international travel and foreign tourists.

## Questionnaire for the spa resorts

1	Spa resort	
2	Accommodation capacities	Rooms - Beds -
3	Conference Room (capacity)	
4	Restaurant	Tables - Seats -
5	Cooperation with Health Insurance Fund of RNM	Yes No
6	Medical Centre	Physical medicine Rehabilitation Other -
7	Which diagnose is mostly treated in the spa resort	
8	Basic spa services (Bathing)	Bathtub Bathroom/shower Swimming pool Sauna Turkish bath Jacuzzi Other -
9	Supplementary spa services	Massage Fitness Beauty/weight loss treatments Offer of service package per unit price Other -
10	Spring capacity (l/sec)	
11	Water temperature (°C)	
12	Parking site (capacity/vehicles)	
13	Additional activities	Organised excursions or events Animation of visitors Sports activities Other -
14	Potential locations for placement of information boards and road signs	
15	Recommendation for promotion of spa resorts	
16	Recommendations for alignment of legislation	
	Date, drafted by	



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