



SUSTAINABLE WINTER TOURISM DEVELOPMENT PROGRAMME

SOKOBANJA (Serbia) – VARSHETS (Bulgaria)

2020-2029



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INTRODUCTORY NOTES

The sustainable winter tourism development program Sokobanja – Varshets has been developed within the INTERREG Cross-Border Cooperation Programme Bulgaria – Serbia for the period 2020 – 2029.

The development of the project idea is a result of many years of partnership between the two municipalities and an upgrade of previously completed joint projects, and the project name “Winter Cross-Border Tour: Sokobanja - Varshets” clearly integrates the ideas, priorities and activities of the stakeholders in both cross-border regions.

Sokobanja and Varshets have certain common historical and cultural values and significant opportunities for cooperation, primarily in encouraging sustainable tourism development. Their further development is closely related to the extension of their tourist season, retaining the existing and identifying new markets and expanding target groups. For that purpose, the significant goal is the diversification and integration of high-quality service packages for tourists.

Varshets and Sokobanja are spas with a long history, with beautiful nature and potential for significant development of tourism. Still, modern concepts demand integrated arrangements in tourism.

The existing tourist packages include natural and historical attractions, cultural calendars of municipalities, local folklore and festivals. However, these packages are unpopular for several reasons - insufficient product attractiveness, lack of qualified animators, insufficient financial resources for advertising and marketing.

A new joint product for tourists could further stimulate interest and demand for other natural resources of Varshets and Sokobanja, in addition to medicinal springs, and to increase the number of visitors to both spa destinations and also the average length of stay of tourists.

Despite the relatively good tourist infrastructure, the usability of the capacities during the year is quite uneven and concentrated primarily during the summer period, which is an indicator of an insufficient and uncompetitive product during the winter period and also inadequate market segmentation and insufficient number of activities aimed at the target groups. This seasonal characteristic (strong summer season) results in insufficient use of accommodation facilities. In that sense, the development of a new cross-border tourism product - Winter Cross-Border Tour based on the combination of traditional tourism products and alternative forms of tourism will encourage greater and more even tourist occupancy throughout the year, and also employment in both municipalities.

Methodology of work

The research methodology included the use of various qualitative and quantitative methodological tools applied during different phases of Programme development. The making of Winter Tourism Development Programme included close cooperation with local governments, and the methodology itself included several phases:

- Defining the Winter Tourism Development Programme framework - the framework has been created in conformity with the ToR, a task set by Sokobanja Municipality, but with respect to the Law on the Planning System of RS, draft of the Rulebook on the Content and Method of Developing Tourism Development Programme of RS and strategic guidelines of Varshets municipality.
- Collecting data from direct participants in providing services for tourists in these two municipalities. An in-depth questionnaire has been created for the public sector and a questionnaire for the private sector in order to perceive the view of both sectors on the current situation. After collecting 14 questionnaires, an analysis of obtained data was performed. The obtained answers were processed in detail, and conclusions and recommendations were made based on the obtained results.
- Desk analysis of statistical data, strategies and comparative analysis of competitive destinations
- Verification and checking of drafts at workshops held in Sokobanja on 12/6/2020 and in Vashetz on 9/7/2020.

Planning basis for Programme development

The planning bases for the Programme development are plans and strategic documents at local, national, as well as European level. At the same time, the strategic documents at the European Union level are especially important since they need to be harmonized with European practice.

Europe 2020 - A European strategy for smart, sustainable and inclusive growth is the most important strategic planning document of the European Union, whose main goal is to raise the competitiveness of the European economy in a socially acceptable, i.e., economically and environmentally sustainable way. The Strategy consists of five main interrelated goals:

- employment
- research and development
- climate change and energy
- education and
- fight against poverty and social exclusion

The main values are based on economic activities, including tourist activities, which are:

- based on knowledge and information,
- promote efficient use of natural resources and
- encourage economic and territorial cohesion between the EU member states

As part of the Winter Tourism Development Program Sokobanja – Varshets CBC, the Programme contributes to achieving the EU Cohesion Policy 2014-2020, which has two main objectives: Investments in growth and employment and European territorial cooperation. The main objective of the European territorial cooperation (INTERREG) is the promotion of harmonious economic, social

and territorial development of the Union as a whole. The project is also in conformity with the EU Tourism Policy (2010) 352 Activity 5.1: Encouraging competitiveness in the European tourism sector - encouraging the extension of tourist season and encouraging diversification of tourist services offer.

The Winter Tourism Development Program Sokobanja – Varshets is also based on the national and local strategies and plans.

The Project contributes to the Serbian Tourism Development Strategy for the period 2016-2025, which recognizes Sokobanja as one of the 18 priority tourist destinations in Serbia with the following key products: health tourism, events, special interests and circular tours. Tourism is one of the strategic goals in the Strategy of Sustainable Development of Sokobanja 2015-2025, where the following have been identified as special goals: Sustainable Development of Destination and Increasing Competitiveness of Tourist Destination.

The Programme also contributes to achieving goals of the National Strategy for Regional Development of Bulgaria 2012-2022, Strategy of Sustainable Development of Tourism in Bulgaria, as a result of achieved principles of sustainable development and also the Strategy for Regional Development, Montana, 2014-2020.

The Programme also meets the objectives of the EU Strategy for Danube Region, focusing on strengthening innovation and entrepreneurship, preservation of natural and cultural heritage and resources in the Danube Region, to which both municipalities belong and improving connectivity. Numerous tourist and cultural attractions are located in the Danube Region, including both cross-border regions of Varshets and Sokobanja.

The Programme is a means of promoting and initiating project ideas in order to solve common challenges and needs in specific areas which is aimed to achieve true benefits for people and build efficient bonds between the authorities and organizations in the border region. The strategy emphasizes the importance of working together at all levels and suggests the cooperation-based way of working. The successful implementation of the project will support competitiveness and sustainability of the tourism sector in the region, and its unique natural and cultural heritage will be more attractive and permanently popularized.

General information on the municipalities

Sokobanja municipality is located in Eastern Serbia which is one of the least developed parts of the country. The total area of the municipality is 525 square kilometres. The municipality consists of the municipality centre - Sokobanja and 24 villages with a total of 16,021 inhabitants. Tourism is the most important economic sector in the municipality.

Sokobanja is one of the most famous and most popular spas in Serbia which has been dealing with organized health tourism for more than 170 years. The abundance of mineral water springs attracts those who need medical treatment (chronic bronchitis, bronchial asthma, psychoneurosis, high blood pressure, chronic rheumatism, fatigue...), but it is also a favourite place of healthy people who want to rest and walk through untouched nature full of fresh mountain air.

In the vicinity of Sokobanja there are several picnic areas, some of which are only 10-minute walk from the town centre. Numerous historical monuments prove that the territory of Sokobanja municipality has been populated since early times and that the healing properties of its water and air were known in ancient times.

The town was named after the Sokograd fortress, located 2 km away from the town centre, up the Moravica River. It is situated on a high cliff, and was built in the late Middle Ages on Roman foundations. Natural therapeutic factors in Sokobanja are thermal mineral water springs (with temperatures from 28 to 45.5 °C), used for bathing and inhaling and moderate continental climate characterized by favourable atmospheric pressure, moderate rains, little fog and few windy days, high concentration of oxygen, ozone and negative ions in the air and absence of air pollution. The mineral water springs are located in the central park and Banjica park.

A wide range of sports, cultural and tourist events are held in Sokobanja throughout the year.

Sokobanja municipality has lots of experience in the territorial cooperation at the national and cross-border level. Sokobanja is one of the 8 municipalities in the eastern Serbia which are founders of the Regional Development Agency - RARIS.

Varshets municipality is located in Bulgaria. It is situated in the south-eastern part of Montana region, 30 km away from the regional centre and 90 km from Sofia.

The municipality includes one town - Varshets and 8 villages. The population of Varshets municipality, according to latest data, consists of 7,737 people, and the largest part - 6,035 people (78% population) are concentrated in the town.

Tourism is the most important economic sector in the municipality. Varshets is a spa town in the Montana region, north-western Bulgaria, which has been dealing with organized spa tourism for more than 167 years. One of the oldest and most popular summer resorts in northern Bulgaria is famous for its medicinal mineral water springs, mild mountain climate, beautiful nature and a large landscaped park.

The opportunities for the improvement of tourism in Varshets are related to the potential of preserved natural complex, the richness of the cultural and historical heritage, the existing accommodation and catering centres and infrastructure. Further development of Varshets municipality is closely related to the development of tourism and identification of new markets abroad, in order to attract foreign tourists. For that purpose significant goals are diversification and integration of tourist services packages, but promotion is also necessary.

The total number of beds in Varshets municipality slowly increases every year. There are 3 new SPA hotels. New small capacity objects are also being opened - houses for rural tourism, family hotels and tourist resorts. New attractive objects are being built as part of EU-financed projects. The utilization of accommodation facilities is low, despite relatively good tourist suprastructure, which is an indicator of insufficient and uncompetitive products.

The seasonal characteristic (strong summer season and very weak winter one) in both municipalities influence the poor utilization of tourist capacities on an annual basis. In that context, the development of new cross-border tourism product, primarily during the winter period will influence the higher tourist attendance, more even tourist demand during the year and greater occupancy and use of tourist capacities.

Analysis of the current state of tourism

The analysis of the current state of tourism is given by municipalities:

Sokobanja

Sokobanja is one of the five most visited tourist destinations in Serbia. The statistical presentation of tourist attendance is given in the following tables:

Arrivals:

| | | month | | | | | | | | | | | | Total |
|------|----------|-------|------|------|-------|-------|-------|-------|-------|-------|------|------|------|----------------|
| Year | Number | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | |
| 2010 | Domestic | 895 | 1628 | 3471 | 4825 | 4852 | 5489 | 7054 | 8231 | 4001 | 2935 | 963 | 925 | |
| | Foreign | 52 | 59 | 514 | 62 | 58 | 69 | 148 | 71 | 98 | 186 | 129 | 142 | |
| | In total | 947 | 1687 | 3985 | 4887 | 4910 | 5558 | 7202 | 8302 | 4099 | 3121 | 1092 | 1067 | 46.857 |
| 2011 | Domestic | 725 | 1534 | 3268 | 3925 | 4012 | 5340 | 6921 | 8056 | 3729 | 2754 | 879 | 821 | |
| | Foreign | 41 | 35 | 415 | 52 | 33 | 58 | 123 | 62 | 89 | 156 | 114 | 125 | |
| | In total | 766 | 1569 | 3683 | 3977 | 4045 | 5398 | 7044 | 8118 | 3818 | 2910 | 993 | 946 | 43.267 |
| 2012 | Domestic | 838 | 1768 | 2456 | 4125 | 4386 | 5569 | 6841 | 8193 | 4059 | 3002 | 983 | 874 | |
| | Foreign | 75 | 51 | 603 | 93 | 75 | 147 | 187 | 61 | 152 | 169 | 140 | 196 | |
| | In total | 913 | 1819 | 3059 | 4218 | 4461 | 5716 | 7028 | 8254 | 4211 | 3171 | 1123 | 1070 | 45.043 |
| 2013 | Domestic | 905 | 1965 | 1964 | 4091 | 4382 | 5426 | 6854 | 8092 | 4005 | 2867 | 958 | 800 | |
| | Foreign | 61 | 42 | 598 | 95 | 82 | 159 | 199 | 65 | 164 | 189 | 152 | 203 | |
| | In total | 966 | 2007 | 2562 | 4186 | 4464 | 5585 | 7053 | 8157 | 4169 | 3056 | 1110 | 1003 | 44.318 |
| 2014 | Domestic | 1129 | 2325 | 2004 | 4911 | 4998 | 6542 | 7111 | 8183 | 4470 | 3009 | 1284 | 876 | |
| | Foreign | 82 | 58 | 658 | 142 | 119 | 241 | 289 | 120 | 182 | 248 | 187 | 234 | |
| | In total | 1211 | 2383 | 2662 | 5053 | 5117 | 6783 | 7400 | 8303 | 4652 | 3257 | 1471 | 1110 | 49.402 |
| 2015 | Domestic | 1171 | 2456 | 2152 | 5018 | 5136 | 7033 | 7289 | 8264 | 4526 | 3115 | 1293 | 894 | |
| | Foreign | 94 | 62 | 654 | 157 | 124 | 258 | 302 | 125 | 193 | 254 | 192 | 265 | |
| | In total | 1265 | 2518 | 2806 | 5175 | 5260 | 7291 | 7591 | 8389 | 4719 | 3369 | 1485 | 1159 | 51.027 |
| 2016 | Domestic | 1235 | 2691 | 2008 | 4986 | 5422 | 7204 | 7947 | 8382 | 4732 | 3105 | 1418 | 845 | |
| | Foreign | 152 | 81 | 635 | 195 | 135 | 264 | 344 | 138 | 173 | 253 | 187 | 272 | |
| | In total | 1387 | 2772 | 2643 | 5181 | 5557 | 7468 | 8291 | 8520 | 4905 | 3358 | 1605 | 1117 | 52.804 |
| 2017 | Domestic | 1247 | 2623 | 2021 | 5065 | 5707 | 7315 | 7923 | 10100 | 4555 | 3693 | 1588 | 678 | |
| | Foreign | 149 | 85 | 702 | 208 | 162 | 259 | 180 | 263 | 113 | 189 | 111 | 226 | |
| | In total | 1396 | 2708 | 2723 | 5273 | 5869 | 7574 | 8103 | 10363 | 4668 | 3882 | 1699 | 904 | 55.162 |
| 2018 | Domestic | 1553 | 2617 | 4065 | 8514 | 12957 | 11541 | 12285 | 15479 | 8949 | 5243 | 2742 | 2029 | |
| | Foreign | 615 | 414 | 1439 | 877 | 1144 | 1300 | 1513 | 1656 | 1689 | 907 | 510 | 1129 | |
| | In total | 2168 | 3031 | 5504 | 9391 | 14101 | 12841 | 13798 | 17135 | 10638 | 6150 | 3252 | 3158 | 101.167 |
| 2019 | Domestic | 1757 | 3178 | 4750 | 9646 | 13250 | 16278 | 16205 | 17663 | 12130 | 7488 | 3413 | 2384 | |
| | Foreign | 628 | 488 | 1695 | 1440 | 1601 | 1869 | 2207 | 2263 | 1746 | 1104 | 708 | 977 | |
| | In total | 2385 | 3666 | 6445 | 11086 | 14851 | 18147 | 18412 | 19926 | 13876 | 8592 | 4121 | 3361 | 124.868 |

Source: Tourist Organization of the Municipality of Sokobanja

This statistical review shows that the number of tourists has been constantly growing in the last 10 years, and that in 2019 the number of tourists is three times higher than 10 years ago. Also, seasonality during the year is noticeable. The peak of tourist attendance is in the period June-August. It can be said that the tourist season lasts from April to September. In the rest of the year, the number of tourists is many times lower.

Overnights:

| | | month | | | | | | | | | | | | Total |
|------|----------|-------|-------|-------|-------|-------|-------|-------|--------|-------|-------|-------|-------|----------------|
| | Number | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | |
| Year | Nights | | | | | | | | | | | | | |
| 2010 | Domestic | 2451 | 2969 | 5284 | 14122 | 18095 | 31156 | 36952 | 42851 | 18267 | 10012 | 2596 | 2643 | |
| | Foreign | 128 | 106 | 1065 | 256 | 224 | 417 | 668 | 426 | 415 | 358 | 214 | 392 | |
| | In total | 2579 | 3075 | 6349 | 14378 | 18319 | 31573 | 37620 | 43277 | 18682 | 10370 | 2810 | 3035 | 192.067 |
| 2011 | Domestic | 2222 | 2894 | 5163 | 13741 | 17999 | 31026 | 35621 | 41492 | 17901 | 9421 | 2102 | 2535 | |
| | Foreign | 125 | 98 | 985 | 195 | 194 | 376 | 643 | 379 | 391 | 359 | 201 | 384 | |
| | In total | 2347 | 2992 | 6148 | 13936 | 18193 | 31402 | 36264 | 41871 | 18292 | 9780 | 2303 | 2919 | 186.447 |
| 2012 | Domestic | 2353 | 3095 | 5328 | 14862 | 18564 | 31278 | 35642 | 41562 | 17983 | 9685 | 2214 | 2753 | |
| | Foreign | 176 | 136 | 1092 | 226 | 242 | 406 | 772 | 444 | 469 | 362 | 271 | 463 | |
| | In total | 2529 | 3231 | 6420 | 15088 | 18806 | 31684 | 36414 | 42006 | 18452 | 10047 | 2485 | 3216 | 190.378 |
| 2013 | Domestic | 2401 | 3006 | 5274 | 14232 | 18451 | 29541 | 33878 | 40125 | 18542 | 9781 | 2111 | 2756 | |
| | Foreign | 165 | 124 | 986 | 214 | 241 | 398 | 732 | 428 | 416 | 293 | 223 | 398 | |
| | In total | 2566 | 3130 | 6260 | 14446 | 18692 | 29939 | 34610 | 40553 | 18958 | 10074 | 2334 | 3154 | 184.716 |
| 2014 | Domestic | 2602 | 3394 | 5968 | 18564 | 20159 | 32639 | 39856 | 43689 | 21737 | 12956 | 3562 | 3006 | |
| | Foreign | 207 | 182 | 1204 | 395 | 342 | 545 | 965 | 492 | 521 | 376 | 279 | 461 | |
| | In total | 2809 | 3576 | 7172 | 18959 | 20501 | 33184 | 40821 | 44181 | 22258 | 13332 | 3841 | 3467 | 214.101 |
| 2015 | Domestic | 2951 | 3758 | 6422 | 20540 | 23961 | 34851 | 41052 | 45203 | 22531 | 13985 | 4125 | 2965 | |
| | Foreign | 201 | 196 | 1185 | 425 | 387 | 631 | 1058 | 512 | 541 | 396 | 280 | 473 | |
| | In total | 3152 | 3954 | 7607 | 20965 | 24348 | 35482 | 42110 | 45715 | 23072 | 14381 | 4405 | 3438 | 228.629 |
| 2016 | Domestic | 3002 | 3952 | 6502 | 21010 | 25243 | 36451 | 40354 | 45230 | 25806 | 14763 | 4241 | 3364 | |
| | Foreign | 245 | 215 | 1112 | 542 | 409 | 627 | 1189 | 438 | 559 | 386 | 301 | 492 | |
| | In total | 3247 | 4167 | 7614 | 21552 | 25652 | 37078 | 41543 | 45668 | 26365 | 15149 | 4542 | 3856 | 236.433 |
| 2017 | Domestic | 3124 | 5575 | 9704 | 22737 | 29546 | 39871 | 43214 | 50272 | 25215 | 17842 | 6469 | 1581 | |
| | Foreign | 286 | 236 | 1127 | 556 | 414 | 731 | 760 | 947 | 462 | 297 | 239 | 725 | |
| | In total | 3410 | 5811 | 10831 | 23293 | 29960 | 40602 | 43974 | 51219 | 25677 | 18139 | 6708 | 2306 | 261.930 |
| 2018 | Domestic | 4485 | 9750 | 32454 | 37085 | 63775 | 64759 | 75730 | 90937 | 48562 | 27353 | 13102 | 7553 | |
| | Foreign | 981 | 909 | 4814 | 2175 | 3530 | 3958 | 4810 | 6902 | 4849 | 2582 | 1364 | 2169 | |
| | In total | 5466 | 10659 | 37268 | 39260 | 67305 | 68717 | 80540 | 97839 | 53411 | 29935 | 14466 | 9722 | 514.588 |
| 2019 | Domestic | 6630 | 11350 | 17546 | 48259 | 67135 | 81515 | 85165 | 95280 | 62606 | 41615 | 15110 | 8717 | |
| | Foreign | 1079 | 1000 | 3736 | 4392 | 4799 | 5647 | 7605 | 6621 | 5298 | 3451 | 1793 | 2073 | |
| | In total | 7709 | 12350 | 21282 | 52651 | 71934 | 87162 | 92770 | 101901 | 67904 | 45066 | 16903 | 10790 | 588.422 |

Source: Tourist Organization of the Municipality of Sokobanja

The growth in the number of overnight stays on an annual level is also evident, with the turning point being 2018. when tourist attendance doubled. To a large extent, this sudden growth is a consequence of the issuance of tourist vouchers by the RS Government, but given the significant and tourist growth of foreign tourists, the use of online reservation systems such as booking.com, AirBNB and the like has greatly contributed to the increase in tourist attendance.

The average number of stays in the summer season is 5 days, while in the winter season the average length of stay is 3 days.

The most represented group of tourists are married couples with children, especially residents of large cities in Serbia, participants in seminars and congresses, athletes and nature lovers. According to the data of the Tourist Organization of the Municipality of Sokobanja, about 60% of the guests are from Belgrade, 20% from Vojvodina and the other 20% from the rest of Serbia.

As for foreign tourists, the largest number are from Bulgaria and the former Yugoslav republics, followed by Hungary, Romania, Greece and Austria.

The main target groups in the winter, according to Tourist Organization of the Municipality of Sokobanja data are:

| | | | | | |
|-------------|------------|-------------|----------------|----------------|-------------------|
| By age | 1-15 | 16-30 | 31-45 | 46-65 | over 65 |
| | 25% | 10% | 50% | 10% | 5% |
| By location | Up to 50km | Up to 100km | Up to 150km | Up to 200km | over 200km |
| | | 3% | 2% | 5% | 90% |
| By interest | bussiness | sport | weekend /relax | winter holiday | speecial interest |
| | 5 | 10 | 65 | 15 | 5 |

According to the data of the tourist sector, in the winter period, the motive for coming to hotels and private accommodation differs. In private accommodation, couples with children usually come on weekends or winter holidays, while in hotels a significant part are athletes on training, children in educational camps or on organized holidays and to a lesser extent seminars.

The way of tourist arrival is shown in the following tables:

| Vehicle | By car | By bus | By air plane | Other |
|---------|--------|--------|--------------|-------|
| | 75% | 20% | 5% | |

On the territory of Sokobanja there is a well-organized taxi service and local bus lines to tourist attractions in the summer. Throughout the year, there are enough daily departures from the bus station in Sokobanja to Belgrade and Nis. From Nis, there are international departures to major cities of neighboring countries. During the summer (May, June, July and August) there are bus lines: Sokobanja - Zajecar, Sokobanja - Novi Sad, Sokobanja - Leskovac and Sokobanja - Zrenjanin.

The proximity of the airport in Nis (60 km) affects the fact that tourists who come to Serbia and Sokobanja from abroad, mostly come using this airport, which has a significant number of lines of low-budget companies. About 89% of tourists use Nis Airport, 10% Belgrade Airport and about 1% Sofia. However, not all potentials and possibilities of the proximity of the airport in Nis have been used, and in the future we should work on a larger commissioning of this airport for the needs of tourism development in Sokobanja

According to the research conducted by the survey, the motivation of tourists to come to Sokobanja during the winter is as follows:

| | |
|---|---|
| 1 | Relaxation with wellness & spa facilities at affordable prices |
| 2 | Active vacation |
| 3 | Preparations of athletes - the existence of significant sports facilities with the possibility of altitude training |
| 4 | Sports events - mountaineering actions |
| 5 | Price competition - solid accommodation and gastronomic offer |

Accommodation facilities

Sokobanja has significant accommodation capacity, but not all are available during the winter. After the summer season, a large number of accommodation facilities are closed, accommodation capacities are halved and amount to about 3,300 beds in the winter.

| | Name of object | Type of objects | Number of beds: | Facilities |
|----|------------------------------------|--------------------------------|------------------------|--|
| 1 | Hotel "Moravica" | Hotel*** | 193 | Table-tennis room and billiard pool, trim cabinet, internet cafe, football, basketball and volleyball field, conference hall with 220 seats. |
| 2 | SB "Banjica" | Resort | 260 | massage, sport facilities: basketball, football, volleyball fields, internet cafe, 2 conference halls with 400 and 100 seats, health service |
| 3 | Garni hotel "Soko Terme" | Hotel*** | 20 | massage, sauna, salt room, fitness gym, 2 indoor and 1 outdoor swimming pool, beauty salon |
| 4 | Nataly spa | Apart lodgings | 50 | Wellness - massage, jacuzzi, steam bath, Finish sauna, tropical rains, kneipp benches, hot benches, salt cave, swimming pool, restaurant. |
| 5 | Special hospital Sokobanja | commercial part of hospital | 100 | massage, sauna, salt room, pearl bath, fitness gym, 1 indoor thermal swimming pool, sport fields, health path, wellness, fitness and Soko-life programm, beauty salon |
| 6 | Hotel „Zdravljak“ | Hotel* | 298 | 2 indoor swimming pools, sauna, Hairdresser, sport facilities: basketball, football and volleyball fields, 4 tennis courts, bowling, internet cafe, 2 conference halls with 210 and 40 seats <i>Note: The facility is leased and does not work all year round</i> |
| 7 | „Turist“ | Konak | 120 | <i>Note: The facility is leased and does not work all year round</i> |
| 8 | Hotel“Сунце“ | Hotel | 270 | 2 indoor pools, 1 outdoor pool, wellness and spa center, 3 congress halls with 120, 80 and 30 seats <i>Note: The building is in the final phase of construction. It is expected to open in the next period</i> |
| 9 | Pansion “Aleksandar” | Pansion | 20 | |
| 10 | Pansion “Palma” | Pansion | 40 | |
| 11 | Pansion “Čikago” | Pansion | 57 | |
| 12 | Pansion “Splendid” | Pansion | 19 | |
| 13 | Pansion "Župan" | Pansion | 24 | |
| 14 | Pansion “Kaskade” | Pansion | 10 | |
| 15 | Pansion "Lav" | Pansion | 31 | |
| 16 | Pansion Sunny | Pansion | 29 | |
| | | Total number of objects | Number of beds: | |
| 10 | Providers of private accommodation | 120 | 1800 | |
| 11 | Rural households | 8 | 35 | |

The situation is similar with catering facilities, which function and work in a significantly smaller number in the winter. In addition to a variety of daily offers, Sokobanja also offers evening entertainment, primarily on weekends.

The display of facilities that work outside the summer season is given in the following table:

| | | Number of entities: |
|----|---|---|
| 1 | Number of restaurants | 8 |
| 2 | Number of pizzeria | 3 |
| 3 | Number of traditional / Etno restaurants | 1 |
| 4 | Number of fast food | 11 |
| 5 | Number of bars/cafes | 7 |
| 6 | Number of internet bars/cafes | 0 <i>Most facilities have free wi-fi</i> |
| 7 | Number of beer pubs | 1 |
| 8 | Number of specialized objects / wines, chinese food, mexican food, etc... | 0 |
| 9 | Number of night bars | 2 |
| 10 | Number of disco clubs | 1 |
| 11 | Number of catering companies | 3 |

Tourist attractions

| Attraction | Short description | Number of visitors in 2019: | Possibility of tourist valorization in the winter |
|--------------------------------------|--|-----------------------------|---|
| Turkish bath Amam | It was built by the Turks on the foundations of the Roman baths in the 16th century, and it is the only original Turkish bath in operation in Serbia. It is part of SB Sokobanja | cca 20.000 | √ √ √ |
| Skating rink and toboggan run | Skating rink, dimensions 16 * 14 and toboggan run, with synthetic ice, which can be used all year round. | Built in 2020 | √ √ √ |
| Medieval town Sokograd | It was built at the end of XIII and the beginning of XIV century at the foundations of the old roman fortress. | around 50.000 | √√ |
| Picnic place Lepterijska | Protected natural asset (2nd degree of protection - landscape of exceptional features. Here is the church, a natural phenomenon of the Most Holy Mother of God in the rock, the medieval town of Sokograd and the lookout Popovica | cca 60.000 | √√√ |
| Ozren mountain | Very attractive mountain for hiking, biking and staying in nature. In the central part there is a landscaped area with sports fields and a cafe. It is a very attractive natural monument Ripaljka / large and small. There are several attractive picnic areas and mountain walking routes. | cca 70.000 | √√√ |
| Picnic place Vrelo-Borici | Vrelo is connected by stairs to the Borići picnic area, located in a pine forest and equipped with wooden furniture and a children's playground. There is a Summer Stage facility built on Vrelo | there is no precise data | √√ |

| | | | |
|--|--|--------------------------|-----|
| Mountain Rtanj | A very attractive mountain that represents a natural phenomenon of karst relief and attracts a significant number of visitors. Declared a Special Nature Reserve by the old state due to endemic and relict flora and fauna as well as the specific shape and composition of the relief. Many mountaineers visit Rtanj throughout the year individually or in organized actions. | cca 50.000 | √√√ |
| Vrmdza - Vrmdza town and Vrmdza lake | Near the village of Vrmdza. It was built until the 6th century as a fortress for the defense of the imperial road to the Middle East. Vrmdza Lake is located at the foot of the mountain Rtanj. It is ideal for relaxation. | there is no precise data | √√ |
| Ethno corner Watermills of Grudonjci | It has two mills. Large mill was turned into an ethno kitchen. In the yard there is a small amphitheater. | about 5.000 | √ |
| Sesalac cave | Sesalac cave in the village Sesalac, is lightened in the length of 200 m and has rich cave ornaments: stalactites, stalagmites, travertine baths and delicate draperies. | there is no precise data | √√√ |
| Spring of the river Moravica | It is a pleasant place for rest and picnickers, near the crystal clear water surface where the river Moravica emerges. | there is no precise data | √ |
| Bovan lake | It is an artificial accumulation. There are several well-maintained beaches. Rich in fish | there is no precise data | √ |
| Picnic place Vrelo (mountain Bukovik) | The main attraction of this picnic area, are the springs of hot and cold mineral water, preserved nature and clean air. | there is no precise data | √ |

From the above table, it is evident that the main tourist attractions are natural resources, while the tourist superstructure that is in operation in the winter is almost non-existent.

Of course, in the winter months, a very attractive offer is made by Wellness centers with thermo-mineral water, which are widely known for their healing properties.

Possibility for active vacation – sports

Favorable climatic factors, ideal altitude, clean air, untouched nature, numerous mountains and a wealth of hydrographic resources are ideal conditions for the development of sports and recreational tourism and basic training of athletes.

For that purpose, several sports facilities and fields were built and arranged, which are managed by the Sports and Recreation Center "Podina". Numerous professional sports clubs perform their preparations in Sokobanja, because it provides excellent conditions for fitness training, with the possibility of using the terrain and tracks at different altitudes.

The surroundings of Sokobanja are ideal for cycling, whether they are recreational or professional. There are over 400 km of marked trails for all lovers of mountain biking (MTB - mountain biking).

The mountains surrounding Sokobanja are a real challenge for both recreational and professional alpinists. There are marked hiking trails for beginners and steep and inaccessible peaks for professionals.

Sports facilities are shown in the following table:

| # | Sports facility | Opportunities for sports (football, basketball.....) | Possibility of renting |
|---|-------------------------------|--|------------------------|
| 1 | Sports Hall | Basketball, volleyball, etc. | Yes |
| 2 | Sports complex Podina | Complex of football fields with floodlights - 2 auxiliary football fields, 3 fields for younger categories, mini pitch with artificial grass, locker rooms and gym | yes |
| 3 | Skating rink and toboggan run | Skating, sledding | No |

Events

In the period outside the main season, it is evident that there are not many organized events. Events organized by the local self-government are grouped around the New Year, and in addition, a couple of mountaineering actions are organized by mountaineering associations.

The overview is given in the following table:

| | Name of winter event | Type of events (business / congres, sport, exhibitions, concerts, fairs...) | Location | Number of visitors (domestic/ foreign) | Organizer |
|---|-----------------------------------|---|------------------------|--|---------------------------|
| 1 | Climbing action "Vrmdzilla" | sport | Vrmdža/Rtanj | 900/200 | PD "Oštra Čuka" |
| 2 | Climbing action "Radenkovanje" | sport | Planine Ozren i Devica | 1100/150 | PD "Oštra Čuka" |
| 3 | Christmas climb on mountain Rtanj | sport | Rtanj | 1200/200 | PD Boljevac i TO Boljevac |
| 4 | "Garden of open heart" | entertainment | Center of Sokobanja | 1200/500 | TOSB |
| 5 | New Year's Fair | fair | Center of Sokobanja | 500 | Municipality of Sokobanja |

Cultural events

The calendar of cultural events indicates that in the period outside the summer season, there are almost no events.

The objects of culture are: the Homeland Museum, the Legacy of Milun Mitrović, the Homeland Museum of Vrmdža and the Homeland Museum of Jošanica. These facilities are mostly available in the summer, when they work every day. However, in the winter they are often not easily accessible to tourists, except for organized visits.

The Moravica cinema is in the phase of reconstruction, but after the completion of the works, this facility will enable the organization of various events in the winter as well. The facility has a hall of 250 seats, with stage lighting and a stage that allows the organization of various events.

CONGRESSES, SEMINARS AND TEAM BUILDING

Thanks to a long tradition, significant accommodation capacities and several different conference halls in hotels, Sokobanja offers solid conditions for the organization of congresses, seminars and other professional gatherings, as well as for the organization of team building. However, the equipment of these halls does not correspond to modern trends and it is necessary to renovate them and technically adequately equip them.

| # | Object | Capacity | No of conference hall | No of meeting rooms |
|---|--|----------|-----------------------|---------------------|
| 1 | Hotel Moravica | 250 | 1 | 1 |
| 2 | SH Banjica | 100 | 1 | |
| 3 | Hotel Zdravljak <i>Note: It does not work all year round. Privatization is expected</i> | 250 | 1 | 1 |
| 4 | Hotel Sunce <i>Note: It is expected to open in the next period</i> | 230 | 2 | 1 |

Possibility for shopping

There are about 15 boutiques, several souvenir shops, jewelry and fashion accessories stores and manufacturers of leather products, healthy food and home-made products. The nearest shopping center of greater importance is Nis at a distance of 60 km.

Tourist agencies

According to the Tourist organization of Sokobanja, there are 8 travel agencies in Sokobanja. However, not all travel agencies work all year round. No travel agency has a license to organize a trip, but all deal with the reception and subagentura - the sale of travel arrangements of other travel agencies.

Varshetz

Varhetz is a spa in northwestern Bulgaria, in the Montana area. The thermal springs of Varshetz have been used since the Roman period and the healing water is used for heart and nervous diseases, general prevention and strengthening of the body. The statistical presentation of tourist attendance is given in the following tables:

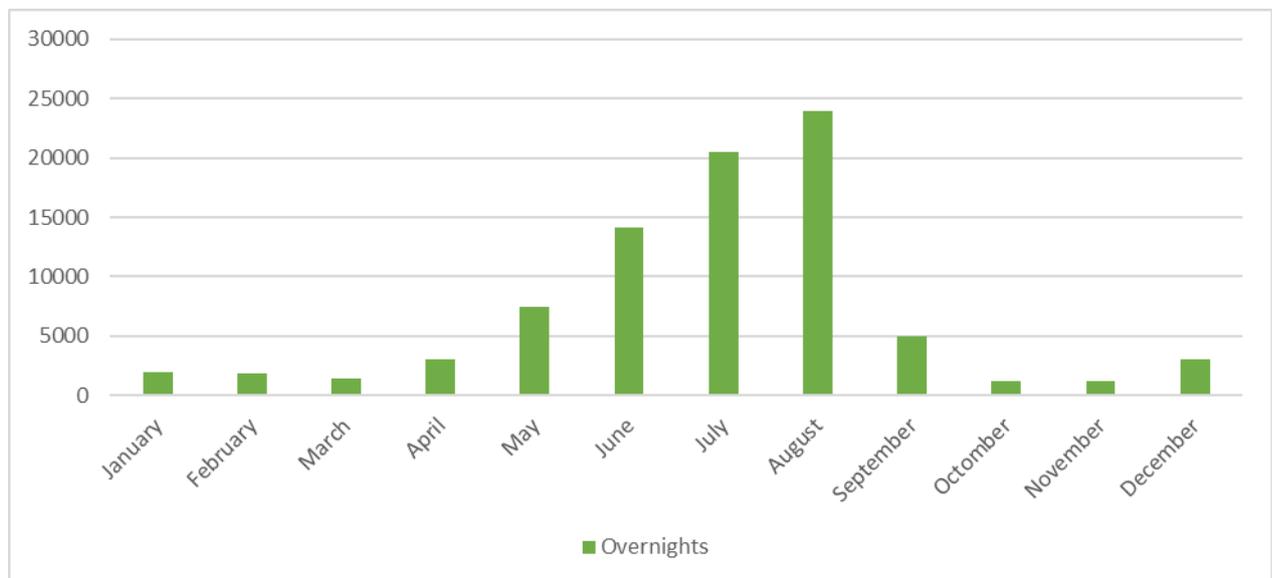
Arrivals:

| | | |
|-------------|-----------------|---------------|
| 2010 | Domestic | 16838 |
| | Foreign | 162 |
| | In total | 17.000 |
| 2011 | Domestic | 24780 |
| | Foreign | 220 |
| | In total | 25.000 |
| 2012 | Domestic | 26200 |
| | Foreign | 300 |
| | In total | 26.500 |
| 2013 | Domestic | 31980 |
| | Foreign | 520 |
| | In total | 32.500 |
| 2014 | Domestic | 34355 |
| | Foreign | 645 |
| | In total | 35.000 |
| 2015 | Domestic | 54050 |

| | | |
|-------------|-----------------|---------------|
| | Foreign | 950 |
| | In total | 55.000 |
| 2016 | Domestic | 83700 |
| | Foreign | 1300 |
| | In total | 85.000 |
| 2017 | Domestic | 60650 |
| | Foreign | 1350 |
| | In total | 62.000 |
| 2018 | Domestic | 37500 |
| | Foreign | 2500 |
| | In total | 40.000 |
| 2019 | Domestic | 42000 |
| | Foreign | 3500 |
| | In total | 45.500 |

According to these data, it can be concluded that Sokobanja is twice as visited as Varshetz. However, the main tourist season coincides.

The overview of arrivals by months in Varshetz is given in the following chart:



As in Sokobanja, in Varshetz too, tourists mostly come by car (80%), and others by public transport. There is public transport to the capital Sofia, the regional center of Montana, Vratsa, Berkovitsa and Lakatnik station. Sofia International Airport is 100 km away.

According to the municipality of Varshetz, the largest number of tourists is from Sofia (70%), the other 30% are from larger cities in the region: Montana (10%), Vratsa (15%), Vidin (5%)

The structure of tourists according to various criteria is given in the following table:

| By age | 1-15 | 16-30 | 31-45 | 46-65 | over 65 |
|------------|------------|-------------|-------------|-------------|------------|
| | | 10% | 30% | 60% | |
| By locatio | Up to 50km | Up to 100km | Up to 150km | Up to 200km | over 200km |
| | 25 | 70 | 5 | | |

| By interest | bussiness | sport | weekend /relax | winter holiday | special interest |
|-------------|-----------|-------|----------------|----------------|------------------|
| | 10% | 3% | 67% | 20% | 5 |

According to the municipality of Varshetz, the five main reasons for the arrival of tourists are:

| |
|---------------------|
| 1. mineral water |
| 2. beautiful nature |
| 3. fresh air |
| 4. cultural events |
| 5. calm, silence |

Accommodation facilities

Accommodation capacities in Varshetz are quantitatively significantly smaller than in Sokobanja, 723 beds in the winter, however qualitatively Varshetz has a better structure of accommodation capacities.

Accommodation capacities are shown in the following table:

| | Name of object | Type of objects | Number of beds: | Facilities |
|----|--------------------------|-----------------|-----------------|---|
| 1 | SPA HOTEL „ATA” | Hotel**** | 158 | indoor pool, spa&wellness, animation for kids |
| 2 | SPA HOTEL „MEDICUS” | Hotel**** | 78 | indoor pool, spa&wellness, animation for kids |
| 3 | SPA HOTEL „SUNNY GARDEN” | Hotel*** | 82 | indoor pool, spa&wellness, animation for kids |
| 4 | Balneohotel ”Tintyava” | Hotel*** | 90 | indoor pool |
| 5 | Hotel ” Tintyava 2” | Hotel** | 36 | |
| 6 | Hotel „Chinarite“ | Hotel** | 60 | |
| 7 | "St. George" | guest house | 14 | |
| 8 | "Berlin” | guest house | 23 | |
| 9 | „Da Vinchi“ | guest house | 24 | |
| 10 | “Luchi“ | guest house | 24 | |
| 11 | „ Garata” | guest house | 10 | |
| 12 | „Elina” | guest house | 12 | |
| 13 | „Na kapitana“ | guest house | 16 | |
| 14 | „Sunday house“ | guest house | 10 | |
| 15 | „Panorama 3 D“ | guest house | 10 | |
| 16 | "Tiankovi Kushti" | guest house | 36 | |
| 17 | ” VIK” Ltd. - Montana” | guest house | 22 | |
| 18 | „Isaeva Kashta“ | guest house | 18 | |

The total number of restaurants and entertainment facilities is 52, with a capacity of 2994 seats and they are categorized as follows: 1 star - 26, 2 stars - 15, 3 stars - 11.

| | | Number of entities: |
|---|--|---------------------|
| 1 | Number of restaurants | 11 |
| 2 | Number of pizzeria | |
| 3 | Number of traditional / Etno restaurants | |
| 4 | Number of fast food | 3 |

| | | |
|----|---|----|
| 5 | Number of bars/cafes | 24 |
| 6 | Number of internet bars/cafes | |
| 7 | Number of beer pubs | 6 |
| 8 | Number of specialized objects / wines, chinese food, mexican food, etc... | |
| 9 | Number of night bars | 1 |
| 10 | Number of disco clubs | 1 |
| 11 | Number of catering companies | |

Tourist attractions

The most important tourist attraction, according to the municipality of Varshetz, in the winter is the skating rink with synthetic ice, which is visited by about 400 visitors a year.

The 300-hectare nature park "Paleopark" in the center of Varshetz is also very attractive, as well as the local museum and gallery, which are free for visitors.

Possibility for active vacation – sports

The most important sports facility in Varshetz is a modern multifunctional sports hall, which provides excellent opportunities for the preparation of athletes and sports talks. All sports facilities are managed by the municipality of Varshetz. An overview of the facilities that are in use during the winter is given in the table:

| # | Sports facility | Opportunities for sports (football, basketball.....) | Possibility of renting |
|---|-----------------------------|--|------------------------|
| 1 | Multifunctional sports hall | the sports ground is designed for volleyball, basketball, handball, tennis | yes |
| 2 | Fitness | Fitness center in the park | subscription |
| 3 | Outdoor gym | | free |

Events

In the period outside the main season, it is evident that there are not many organized events. Events organized by the local self-government are grouped around the New Year, and in addition, a couple of mountaineering actions are organized by mountaineering associations. An overview is given in the following table:

| | Name of winter event | Type of events | Location | Number of visitors | Organizer | |
|---|---|-------------------|--|--------------------|-----------------------|--|
| 1 | JORDAN DAY | Christian holiday | An area "Banski vir" near the mineral fountain | 100 | Municipality Varshets | The ritual for the salvation of the Holy Cross |
| 2 | TRIFON ZAREZAN | Holiday | The central square | 150 | Municipality Varshets | A traditional competition for the best homemade wine tasting by an expert jury |
| 3 | CROSS-BORDER HOLIDAY "WINTER, STARS AND WINE" | Festival | The center of the town | 250 | Municipality Varshets | An exhibition-bazaar of local producers and guests from Sokobanja and |

| | | | | | | |
|---|---|-------------------|-------------------------|-----|-----------------------|---|
| | | | | | | Varshets, as well as a rich concert program |
| 4 | TODOR'S DAY | Christian holiday | An area near Varshets | 150 | Municipality Varshets | An attractive horse race |
| 5 | THIRD OF MARCH – BULGARIAN'S NATIONAL HOLIDAY | Concert | The central town square | 250 | Municipality Varshets | A ceremony for raising the national flag, as well as the concert part |
| 6 | New Year holidays | Holiday | The central town square | | Municipality Varshets | |

In addition to these events, theater performances of guest theaters are organized in Vrshetz, as well as local theater groups.

CONGRESSES, SEMINARS AND TEAM BUILDING

Thanks to high category hotels, Varshetz has significant opportunities for organizing congresses and seminars. About 10% of tourist traffic in the winter is realized in this way, but there is certainly space for further improvement.

The table shows the capacities for congress tourism:

| # | Object | Capacity | No of conference hall | No of meeting rooms |
|---|--------------------------|----------|-----------------------|---------------------|
| 1 | SPA HOTEL „ATA” | 100 | 1 | 1 |
| 2 | SPA HOTEL „MEDICUS” | 50 | 1 | |
| 3 | SPA HOTEL „SUNNY GARDEN” | 80 | 1 | |
| 4 | Balneohotel ”Tintyava” | 60 | 1 | |

Possibility for shopping

There are several boutiques of clothing, perfumes and consumer goods in Varshetz. However, it cannot be said that Varshetz is a developed shopping center. Of course, Varshetz offers a wide selection of souvenirs - greeting cards, magnets, T-shirts, hats and more.

Tourist agencies

According to the data of the municipality of Varshetz, no tourist agency operates on the territory of the municipality.

SWOT Analysis - advantages and disadvantages of winter tourism

| Strengths | Weaknesses |
|---|--|
| <ul style="list-style-type: none"> • Tradition in tourism <ul style="list-style-type: none"> • Built brand • Exceptional natural resources for tourism (thermal mineral springs and geomorphological values) • Existence of a picnic area in the immediate vicinity <ul style="list-style-type: none"> • Rich cultural / historical heritage • Existence of protected natural resources <ul style="list-style-type: none"> • Favorable climatic conditions • Healthy environment • Existence of preconditions for extreme sports • Existence of a large number of catering facilities <ul style="list-style-type: none"> • Authentic gastronomy • A large number of quality accommodation units in the home - apartments • Significant incentives for investments in the construction of higher category hotels - Sokobanja • Continuous growth trend of overnight stays and tourist arrivals | <ul style="list-style-type: none"> • Expressed seasonality of tourist demand • Lack of supply - attractive facilities in the winter <ul style="list-style-type: none"> • Lack of tourist packages and programs • Ignoring modern trends in the world tourism market <ul style="list-style-type: none"> • Relatively poor infrastructure • No district heating during winter • Non-compliance with protection measures in protected areas of nature (numerous examples of neglect and pollution of the environment and degradation of space) • Abandoned buildings and monuments under state protection - Sokograd, Hunting Lodge • Insufficiently arranged picnic areas, hiking and cycling trails • Insufficient capacity utilization for extreme sports <ul style="list-style-type: none"> • Insufficient tourist events in the winter • Obsolete accommodation facilities (hotels) - Sokobanja • Insufficiently arranged rural households to engage in tourism • Lack of educated staff. Quality of the workforce in tourism and hospitality <ul style="list-style-type: none"> • Unpreparedness for foreign guests • Lack of strategic approach to marketing and promotion • Insufficient budget for promotion • Lack of cooperation between the public and private sectors in product development, establishment of a complete value chain and marketing activities • Lack of adequate subsidy programs for micro-entrepreneurs in tourism neither at the state nor at the local level |
| Opportunity | Threats |
| <ul style="list-style-type: none"> • Extension of the tourist season • Privatization of facilities in bankruptcy (DHTP Lepterijski) <ul style="list-style-type: none"> • Heating Sokobanja • Better use of natural resources for tourism purposes in a sustainable way • Development of sports - recreational and adventure tourism <ul style="list-style-type: none"> • Development of rural tourism • Congress tourism • Development of new sports facilities - adrenaline park, ski slope | <ul style="list-style-type: none"> • Financial and economic situation <ul style="list-style-type: none"> • How to use PLF • Poor privatization - Sokobanja <ul style="list-style-type: none"> • Uncontrolled construction • Insufficient coordination of tourism development and environmental protection • Lack of innovation and new entrepreneurial projects <ul style="list-style-type: none"> • Population decline (negative migration / depopulation) |

| | |
|---|--|
| <ul style="list-style-type: none"> • Creating partnerships and regional offer, primarily for foreign markets • Realization of development projects through PPP • Better valorization of the vicinity of Nis and Sofia airports • Acceleration of the process of integration of the Republic of Serbia into the EU and the possibility of using a large number of programs and projects to support and finance activities in tourism | |
|---|--|

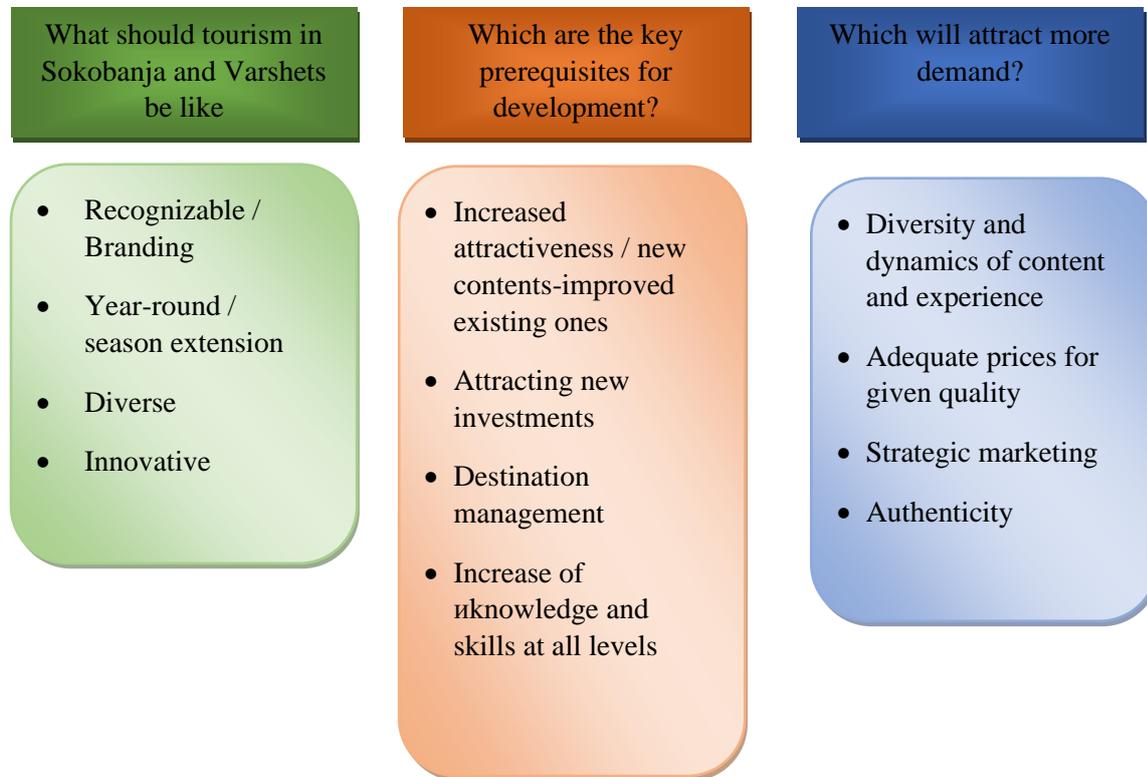
Based on the above analysis, the following can be concluded:

- 1) Sokobanja and Varshetz have the necessary strength for tourism development in the winter - an attractive and diverse natural environment, authentic gastronomy and cultural heritage, a centuries-old tradition of tourism and a built brand
- 2) It is necessary to work on overcoming weaknesses, namely: reducing seasonality by creating attractive facilities in winter, arranging picnic areas, hiking and biking trails, development of new sports facilities - adrenaline park, ski trails and organization of events
- 3) It is necessary to create tourist packages and programs for the winter period, improve marketing and work on establishing regional cooperation, primarily for foreign markets
- 4) The chances for the development of the winter tourist offer are reflected in the development of Wellness, sports-recreational, adventure, business tourism
- 5) Threats are related to the passivation of further activities and incoordination, as well as the lack of a more active role of local authorities in creating the winter tourist offer.

Certainly, when designing strategic directions and key investment projects, one should keep in mind the effects of global warming and the consequences of the COVID-19 pandemic.

VISION

The vision of the winter tourism offer development is based on the system of principle and value which represent answers to the following three questions:



In line with these determinants, the Vision is:

Sokobanja and Varshets are developed tourist destinations with competitive and attractive tourist offer throughout the year, stimulating for investment, they manage the development in their entire region in a sustainable way, they cherish the culture of quality and affordable prices, and they offer their guests a multitude of authentic contents and experiences.

Defining key tourism products

As defined by the World Tourist Organization (UNWTO): "A Tourism Product is a combination of tangible and intangible elements, such as natural, cultural and man-made resources, attractions, facilities, services and activities around a specific centre of interest which represents the core of the destination marketing mix and creates an overall visitor experience including emotional aspects for the potential customers. A tourism product is priced and sold through distribution channels and it has a life-cycle".

Defining priority products was performed based on the statements from the Questionnaire, but also from direct interviews, for those products for which it is real that they can be commercialized at the market in the next five to ten years. In accordance with the Tourism development strategy the following matrix is given:

| Type of strategic business area | Motive, experience | Product/Activity |
|---------------------------------|---|---|
| PLEASURE | Slow down life, relax, enjoy, replenish energy, find time for oneself, lifestyle | Wellness& Spa, gastronomy |
| NATURE | Escape from everyday life, feel healthy, return to nature, feel authentic, feel free | Nature parks, enjoying nature, rural tourism, summer camp |
| SPORT & ADVENTURE | Feel the adrenaline, experience the limit of own physical endurance, be ready for effort | Hiking, mountaineering, zip line, cycling, canyoning, paragliding, skating, certain winter sports, sports camps |
| HEALTH | Be healthy, relax, live long, look well, do something for your own health and good looks | Medical treatments, massage, dentistry, exercise, nutrition – Soko life , meditation |
| Business tourism | Be successful, meet other successful people, be a part of business events | Individual business trips, congresses, seminars, business schools |
| CULTURE | Learn something new, new historical knowledge, discover new artists and literature, feel intellectual | Town sights, churches, monasteries, old fortresses, archaeological sites, local folklore and customs, museums, events |

DEVELOPMENT GOALS FOR TOURISM AND GROWTH MODEL

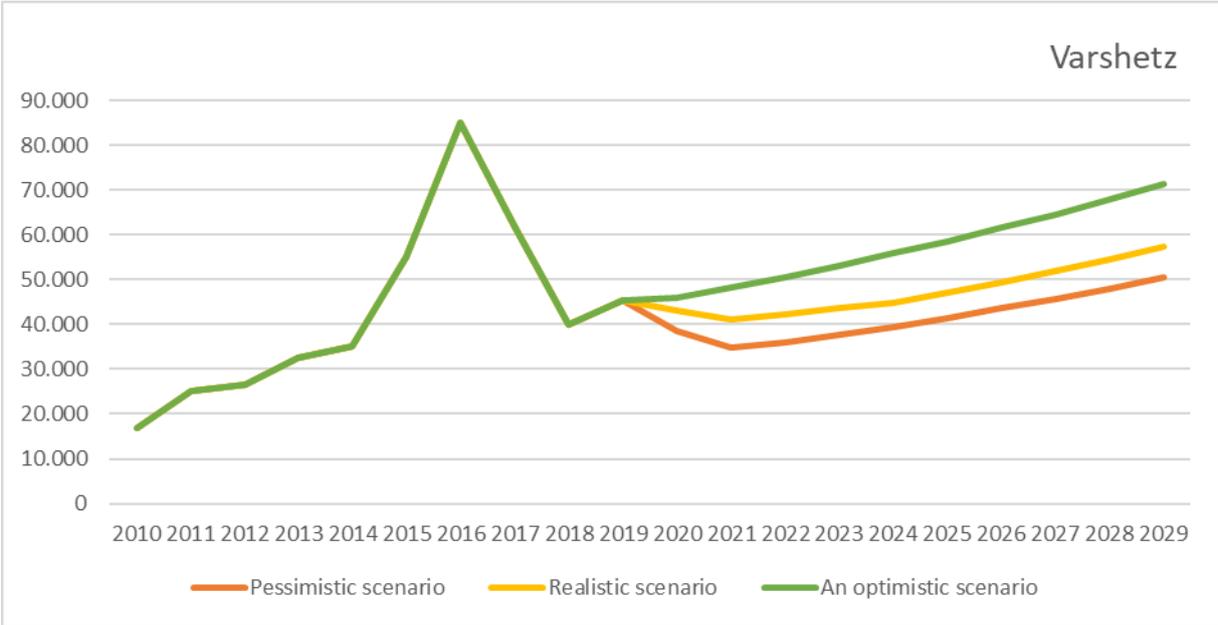
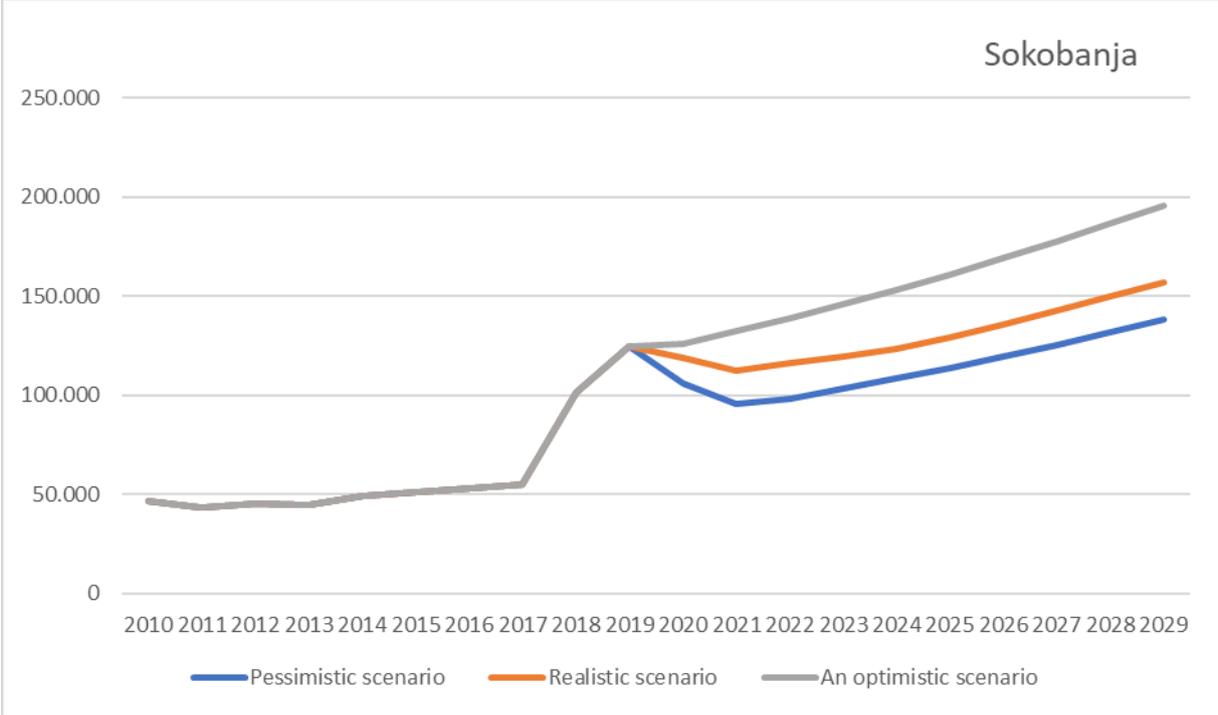
In the coming period, Sokobanja and Varshets should focus on a few key goals for tourism development in the winter period:

1. Increasing attendance in the winter period by increasing the attractiveness and competitiveness of the destination out of summer season
2. Adequate positioning of the destination at the tourism market in the winter season
3. Sustainable destination development – which implies the economic development of the destination while preserving natural and cultural resources, as well as social aspects.

Growth models are very difficult to make during the COVID-19 pandemic, when no precise predictions are yet possible, and it is now clear that the consequences will be the greatest in tourism.

Also, it is very hard to create any mathematical growth model and multiplication effect because no adequate statistics is kept at the level of local government units.

In conformity with the available data, comparable in both municipalities, it is possible to make a projection of the number of tourist visits, as: a base scenario, a pessimistic scenario and an optimistic scenario.



Competitiveness analysis

There are several definitions of tourist destination competitiveness, but we can subsume it in the following way:

The tourist destination competitiveness can be considered its ability to increase expenditures of tourists, to attract significantly more tourists, providing them with satisfying and memorable experiences, and at the same time to do so in a profitable way while improving the well-being of destination residents and preserving the natural treasures of the destination for future generations, (Ritchie & Crouch, 2003)

In order for a tourist destination to be successful, it is necessary to satisfy two parameters, and they are its competitiveness and sustainability, which must be mutually supported and supplemented.

Using Porter's Diamond of Competitive Advantage, we are going to analyze the following elements:

- Production factors – refer to the offer of the destination: natural, cultural and human resources, price as a factor and production efficiency
- Demand factors - market size and market structure
- Complementary and supporting segments - accessibility of destination by various means of transport, parking possibilities, cultural, entertainment and sports facilities, production of souvenirs, shopping opportunities, health care, etc.
- Strategy, structure and competition - conditions for the establishment, organizing and managing companies, as well as the character of internal/domestic competition and the existence of a strategic plan of tourism development supported by both public and private sector.

Of course, the situation caused by the COVID – 19 pandemics, will have long-term effects on the survival and thus the competitiveness of many companies in the field of tourism, and therefore the tourist destinations themselves. For this reason, the development strategy should be carefully set.

The offer of Sokobanja and Varshets is based on natural resources, i.e. magnificent nature, unique landscapes, fresh air, cultural happenings and historical elements. With its diversity of the said values, Sokobanja arouse various motives in prospective visitors. However, the current markets of Sokobanja and Varshets primarily consist of domestic tourists with more modest financial resources, so the prices of products are much lower and adjusted to such customers. Considering that in such conditions a great number of tourists and income generation cannot be expected, the strategic goal of these spa resorts is now targeted towards creation of a much better offer which should attract more demanding but better paying clients. Tourists with good financial situation expect maximum experience in a minimum optimal time. That is why the strategy of further tourism development, primarily during the winter period, should be improving accommodation facilities and catering offer, with the creation of various attractive happenings in this period and the use of natural resources with their maximum preservation, because the preserved environment “at arm's length” to tourists is the greatest comparative advantage of Sokobanja, which should maintain its name the Green Heart of Serbia and confirm the concept it stands for, and that is sustainable development.

Accommodation facilities in Sokobanja must justify its name as one of the leading spas. Therefore, in the next period we need to create various accommodation facilities, from the higher categories hotels, since they represent the base of every tourism market to well-made and attractive ethno-houses / log cabins (glamping). Sokobanja definitely lacks 4 or even 5-star hotels with larger capacities to enable the development of winter tourism, and also other contents such as: larger open and closed swimming pools with thermal water, spa centres, gyms, various sports, etc. In line with the creation of such offer

of Sokobanja is the recent opening of the 4 star „Sunce“ hotel, and the privatization of the „Zdravljak“ hotel the offer of higher-ranking accommodation facilities will be completed, and new people employed.

The gastronomic offer structure is relatively good. The gastro aspect, as an entirely new trend in contemporary tourism, implies authenticity, high quality and is complementary with other products offered by Sokobanja. Insisting on home-made products for which Sokobanja is recognizable, using the materials that already exist in the area and turning that into a comparative advantage, is without competition.

Varshets currently has better hotel accommodation offer, but significantly lacks the offer of apartments and accommodation in households. The gastronomic offer is more modest compared to Sokobanja and should be improved. Generally, the majority of income from tourism is generated in hotels while the non-accommodation consumption is relatively low.

The hiking routes, mountaineering and cycling are recognized as important items in the offer. Since there are many picnic areas in the vicinity of Sokobanja which can be reached on foot, the development of pedestrian zones is inevitable for the development of this spa. For that reason, it is necessary to build or additionally arrange the pedestrian zones and then arrange green areas not only in Sokobanja, but also on the way to the picnic areas and around them, and also parking spaces. The natural environment on which the Sokobanja offer is based must be characterized by arrangement, beauty of events, authenticity and the sight that is more than attractive, with maximum respect for the preservation of natural and cultural values. In order for tourists to remember their experiences and impressions better, it is recommended to create a system of specialists for micro destinations, for example, a cycling specialist, etc.

Sports offer is satisfactory, with a tendency of further development in conformity with the tourists' requirements and trends, especially during the winter period. In addition to that, the focus is on the development of facilities for sports camps.

In order to complement the offer during the winter, cultural events must also be available in the winter period, at least in some form, and their broadcasting in digital format should be enabled. Cultural (Homeland museum and other) and historical resources (Sokograd Fortress and others) and attractions are very important to be emphasized throughout the year because these resources are the basis of existence and authenticity of a destination, important for cultural tourism, thematic and study visits.

Capacities for seminars and congresses are relatively poorly developed and do not satisfy contemporary needs and standards for this type of tourism. With new hotels and the reconstruction of the old ones the situation should change significantly and Sokobanja could become a destination which would be able to compete with others more seriously in the development of congress tourism during the winter period

The constant growth of the number of guests as well as the number of overnight stays through 2010-2019 time series indicates that Sokobanja is on the right path and that through future diversified tourist offer it can count on a larger growth of the number of guests in the future period as well.

Bearing in mind that 50% of guests are between 31-45 years of age, Sokobanja is increasingly profiling itself towards holiday makers who would like to enjoy in nature and thermal waters, relax or play some sport, and according to that fact this spa develops capacities and attractive activities such as adrenaline parks, tubing trails, ferrata trails, zip-line and the like.

Although the largest numbers of guests come by car, the bus lines operate regularly and the availability of the destination is obvious. Air transport to Niš airport is a great advantage and potential which has not yet been sufficiently used. Taxi service is well developed. If the parking space is well organized, and that what every destination strives for, that will be a great advantage for Sokobanja.

The demand for the offer of Sokobanja is the highest among the domestic tourists. The foreign market is still underused, but to enter this market you need to have adequate offer. An incredible shift in the attendance of foreign tourists has been made by the release of accommodation facilities onto the international booking systems such as Booking.com, Airbnb and others which are now widely used. For the arrival of organized and larger groups cooperation with foreign operators should definitely be used.

Rural tourism is a potential for Sokobanja and Varshets and is defined as a tourist trip with the purpose of staying in a rural environment and enjoying traditional local gastronomic specialties and taking part in everyday traditional activities of the local population. The fact that this product is suitable for every season is especially important because it offers a new experience, and on the other hand completes the impression of the destination. Varshets, which has the opportunity to use EU funds, has already withdrawn significant funds for the development of rural tourism. Ethno villages and ethno houses in the wider area of Sokobanja municipality are becoming more and more important as we meet the implementation of IPARD 2 measure 7 of the Republic of Serbia Programme. All settlements of Sokobanja municipality can qualify and be a place of possible investment. Rural tourism represents an added value to the offer of Sokobanja since it offers an emotional note to the stay (rural surroundings, enjoying the gastronomic dishes, etc.). It should be borne in mind that it is very important here to create good marketing, good quality of the offer, but also the people who are trained enough to give information, to be at service to clients, always in good mood and pleasant in order to make an impression for which the tourists will come again.

Sokobanja is one of the five most visited destinations in Serbia. Besides big city centres which generate a large number of visitors, the main competition for Sokobanja are Vrnjačka Banja and Zlatibor. Both destinations have a larger number of good quality accommodation compared to Sokobanja, primarily higher category hotels, and also a tourist offer with more organized activities. For this reason, in order to keep pace with the competition, the offer of Sokobanja should be based on a variety of content and activities in the destination, at competitive prices - maximum of experience for the money invested, and certainly to start shifting its focus from the guests with less money and unorganized offer to clients pay more and good management of the tourist destination.

Further development of Sokobanja and Varshets cannot be imagined without the appreciation of contemporary processes and rapid technological development which influences tourism. The development of information and communicational technologies has become a need and also a necessity and in that sense we should consider such tools of that kind, first of all in the area of marketing and also to make all necessary information available to tourists, which would make these spas in every sense even more modern and stronger compared to the competition.

Private initiative is in its infancy in both municipalities and they should continue creating the environment which will encourage this initiative. Although Serbia does not have much experience in the creation of public-private partnerships in the field of tourism, various positive examples from the neighbourhood can be used. Active cooperation of the private and public sector in this process is necessary, especially in various projects and initiatives. It is assumed that this type of partnership will get its full meaning in the coming period.

In the absence of educated staff in both municipalities, analyzing the support for the creation of DMC - a destination management company, or creating partnerships with the most important representatives of the private sector has become a necessity, and its main role would be in the realization of inspiring and unique experiences within the destination itself. Bearing in mind that tourism is the basic economic sector of both Sokobanja and Varshets, improving knowledge, skills and abilities of the employees in the destination tourism must be an imperative. Human resources are crucial for the development of tourism and therefore it is necessary to continuously pay great attention to them and use the advantages offered by dual education as a form of secondary vocational education.

Human resources in tourism can be viewed from several aspects: as creators of tourism products, as professional executors of managerial, promotional and planning activities, as organizers and implementers of various tourist attractions, providers of accommodation and food services in the spirit of Serbian tradition, etc.

Certainly, in the coming period further work should be done on developing opportunities of further cooperation between Sokobanja and Varshets. It is hard to expect the creation of an offer in which tourists who visit one spa would visit the other during the same holidays. But, promotion channels can be used, as well as the exchange of experiences and joint use of various funds for further development of tourism facilities.

KEY INVESTMENT PROJECTS - ACTIVITY PLAN

| OBJECTIVE 1: Increasing attendance in the winter through increasing the attractiveness and competitiveness of the destination outside the summer season | | | | | |
|---|---|---|--------------------|-----------|--|
| No | Project | Project management | Estimate value EUR | Timeline | Indicators |
| Municipality of Sokobanja | | | | | |
| 1.1 | Arrangement of the quay on Moravica | Municipality of Sokobanja / donors funds | 3.000.000,00 | 2021-2029 | Completed project, Resolved property relations, Realized works - arranged riverbed with pedestrian and bicycle paths |
| 1.2 | Adrenaline park | Municipality of Sokobanja / private partner | 120.000,00 | 2021-2023 | Construction contract concluded Realized works on min 500m2 |
| 1.3 | Zip-line above the Moravica canyon | Municipality of Sokobanja / private partner | 200.000,00 | 2021-2024 | Consent of PC Srbija šume and Institute for Nature Protection of RS Construction contract concluded Realized works |
| 1.4 | Fearata in the canyon of the river Moravica | Municipality of Sokobanja / private partner | 30.000,00 | 2022-2024 | Consent of PC Srbija šume and Institute for Nature Protection of RS Construction contract concluded Realized works |
| 1.5 | Suspension bridge to Sokograd | Municipality of Sokobanja / donors | 150.000,00 | 2023-2026 | Consent of PC Srbija šume and Institute for Nature Protection of RS Construction contract concluded |

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|--|--|--|--------------|-----------|---|
| | | | | | Realized works |
| 1.6 | Construction of an urban year-round ski center with an artificial surface - Soko ski park | Municipality of Sokobanja / Hotel Moravica | 1.770.000,00 | 2022-2029 | Project-technical documentation prepared Realized works / handover report |
| 1.7 | Equipping children's playgrounds in accordance with safety standards | Municipality of Sokobanja | 250.000,00 | 2020-2022 | Arranged 4 children's playgrounds in accordance with the Ordinance on safety - central park, park near the school,, park on Podina, Extreme children's playground - Banjica |
| 1.8 | Construction of a prefabricated sports hall within the sports center Podina | Sports and recreation center Podina | 250.000,00 | 2022-2025 | Construction contract concluded Realized works |
| 1.9 | Winter Sports Magic - Sports Festival | Sports and recreation center Podina TOS | 5.000,00/год | 2020-2029 | Organized 2-day sports festival Min 200 participants / year |
| 1.10 | Organization of cultural events in the winter season | Stevan Sremac Public Library TOS | 6.000,00/год | 2020-2029 | Organized min 3 cultural events Min 200 visitors |
| Municipality Varshetz | | | | | |
| 1.1 | Reconstruction of sports facilities | Municipality of Varshetz / donor funds | 50.000,00 | 2020 | Construction contract concluded Realized works |
| 1.2 | Renovation of the city park | Municipality of Varshetz / donor funds | 50.000,00 | 2021 | Construction contract concluded Realized works |
| 1.3 | Construction of a Paleopark and an information center with an exhibition space in Warsaw and the creation of a joint tourist product "Cross-Border Museum" | Municipality of Varshetz / donor funds | 800.000,00 | 2021 | Construction contract concluded Realized works |
| 1.4 | Winter cultural festival "Winter, stars & wine" | Municipality of Varshetz / donor funds | 5.000,00/год | 2020-2029 | Organized 2-day winter festival Min 200 participants / year |
| OBJECTIVE 2: Adequate positioning of the destination on the tourist market in the winter season | | | | | |
| Municipality of Sokobanja | | | | | |
| 2.1 | Development of a promotion plan for the winter tourist offer | Tourist organization Sokobanja | 5.000,00 | 2021 | Promotion Plan adopted |
| 2.2 | Production of promotional material | Tourist organization Sokobanja | 15.000,00 | 2021 | Catalog of winter tourist offer, Catalog of events, tourist map for winter season |

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| 2.3 | Improving the tourist information system | Municipality of Sokobanja / Ministry for tourism affairs | 50.000,00 | 2020-2021 | Revision of the existing tourist signalization, plan and realization of improvements, mobile application for tourists |
| 2.4 | Connecting attractions for joint sales and placement | Tourist organization Sokobanja / Ministry for tourism affairs | 20.000,00 | 2022-2024 | Created tourist card / Sokobanja and partners (creation of strategic business areas) |
| 2.5 | Creating travel packages | Tourist organization Sokobanja | 10.000,00 | 2022-2023 | Created at least 3 packages for the winter tourist season |
| 2.6 | Promotional activities on social networks | Tourist organization Sokobanja | 150.000,00 | 2020-2029 | Created Instagram Story marketing campaign, paid campaign on Youtube, Paid banners on daily portals, created promo materials for the Internet, engagement of influencers |
| 2.7 | Capacity building and destination management models | Tourist organization Sokobanja | 10.000,00 | 2021-2022 | Education - professional training and acquisition of skills, Developed destination management model - DMO |
| Municipality Varshetz | | | | | |
| 2.1 | Development of a promotion plan for the winter tourist offer | Municipality of Varshetz / Tourist Information Center | 5.000,00 | 2021 | Promotion Plan adopted |
| 2.2 | Production of promotional material | Municipality of Varshetz / Tourist Information Center | 15.000,00 | 2021 | Catalog of winter tourist offer, Catalog of events, tourist map for winter season |
| 2.3 | Improving the tourist information system | Municipality of Varshetz / Tourist Information Center | 50.000,00 | 2020 - 2023 | Revision of the existing tourist signalization, plan and realization of improvements, mobile application for tourists |
| 2.4 | Connecting attractions for joint sales and placement | Municipality of Varshetz / Tourist Information Center | 20.000,00 | 2020-2021 | Created tourist card / Varshetz and partners (creation of strategic business areas) |
| 2.5 | Creating travel packages | Municipality of Varshetz / Tourist Information Center | 10.000,00 | 2021-2023 | Created at least 3 packages for the winter tourist season |
| 2.6 | Promotional activities on social networks | Municipality of Varshetz / Tourist Information Center | 55.000,00 | 2020-2026 | Created Instagram Story marketing campaign, paid campaign on Youtube, Paid banners on daily portals, created promo materials for the Internet, engagement of |

| | | | | | |
|---|---|---|--------------|-----------|---|
| | | | | | influencers |
| 2.7 | Capacity building and destination management models | Municipality of Varshetz / Tourist Information Center | 10.000,00 | 2021-2022 | Education - professional training and acquisition of skills, Developed destination management model - DMO |
| OBJECTIVE 3: Sustainable destination development - economic development of the destination while preserving natural and cultural resources | | | | | |
| Municipality of Sokobanja | | | | | |
| 3.1 | Restoration of the medieval town of Sokograd | Institute for the Protection of Cultural Monuments, Nis / Municipality of Sokobanja | 1.500.000,00 | 2023-2029 | Project-technical documentation prepared Realized works of the 1st phase / record of handover |
| 3.2 | Arrangement of pedestrian paths on Ozren, Rtanj and Devica (with tourist signs, arranged rest areas and lookouts) | Tourist organization Sokobanja / Ministry for tourism affairs | 100.000,00 | 2021-2029 | Completed project / Realized works / handover report |
| 3.3 | Landscaping of mountain bike trails | Municipality of Sokobanja / donors funds | 70.000,00 | 2021-2029 | Mapped terrain and specification of works Performed works, marked trails, promotional material |
| 3.4 | Arrangement of the homeland museum | Stevan Sremac Public Library/ donor funds | 200.000,00 | 2022-2025 | Completed project / Realized works / handover report |
| 3.5 | Arrangement of the Milun Mitrović Legacy | Stevan Sremac Public Library/ donor funds | 350.000,00 | 2022-2025 | Completed project / Realized works / handover report |
| Municipality Varshetz | | | | | |
| 3.1 | Arranging bicycle paths | Municipality of Varshetz / donor funds | 70.000,00 | 2021-2029 | Completed project, Realized works mapped and marked mountain trails |
| 3.2 | Arranging pedestrian paths | Municipality of Varshetz / donor funds | 100.000,00 | 2021-2029 | Completed project / Realized works / handover report |

MANAGEMENT

Destination management is a term which is increasingly used in the context of modern tourism. This term becomes particularly significant from the point of view of development a value chain which would provide the tourists with an unforgettable experience. Due to the complexity of tourist products it is necessary to carefully plan, organize and manage the tourist offer in a comprehensive way, in order to make the tourist offer of the destination competitive on a global scale. In addition, the issue of human resources is extremely important for the development of tourism, so we should constantly take care of the quality and improvement of human potentials.

Therefore, it is important that someone deals with the development of competition of these areas in a professional and efficient way.

The development of tourism in both municipalities is managed by public sector. In Sokobanja municipality the investments in the development of tourism are implemented by municipal administration, whereas for the promotion of tourism, in conformity with the Law on Tourism, the Tourist Organization of Sokobanja municipality was founded. In Varshets municipality functions, as part of municipal administration, the Tourist Information Centre, and the municipality has close cooperation in different projects with local NGO Local Initiative Varshets.

Research shows that the needs of modern tourist demand are constantly changing and that they are conditioned by various technological, social and market factors and trends. To the increasing competition and increasingly demanding guests, the creators of the tourist offer want to respond by creating new, innovative and interesting tourism products. Successful tourist destinations, sell “experience and unique adventure” for tourists at a destination. For that reason, it is necessary to establish the quality of destination management, based on the cooperation of different stakeholders in the destination, from both public and private sector, and in different ways enable and contribute to the creation of interesting tourist experiences. Additionally, significant advance needs to be made in the field of destination marketing and destination management.

Successful models of tourist destination management in the world indicate the necessity of formalized cooperation of the private and public sector, with strong and, over time, growing influence of the private sector with the aim of creating a good corporative structure. For this reason, two tourism management options are proposed in each individual destination, and later the creation of the strategic partnership of these two municipalities.

Tourism management at the tourist destinations themselves is proposed through the **formation of public-private partnership**, in the following way:

1. „*soft cooperation*“ in the form of Council for the Development of Tourism as a new management mechanism which would deal with the development and management of tourist destination of Sokobanja or Varshets.

The formation of Council, as a formal advisory body includes the involvement of private partners (hotels, significant catering facilities, mountaineering societies, cycling clubs, etc) and making all decisions of the public sector in the field of tourism with the obligatory opinion of this Council

2. „*Hard partnership*“ in the form of destination management organization whose founders would be both public and private sector. In this way, the destination management would be raised to a higher level. In conformity with the Law on Tourism, the Destination Management Organization (DMO) is a company or other legal entity founded for the purpose of managing a tourist destination (planning, organizing, marketing and leading), whose founders may be

from the public or private sector. Bearing in mind that partnership is a long lasting process and that it develops and strengthens during the implementation of joint projects, it is necessary to establish the basics of the management system of the affairs of a treated destination.

Strategic cooperation between municipalities Sokobanja and Varshets implies continuous cooperation, which can be organized through **annual / semi-annual forums**, where the participants from these two municipalities would meet, establish cooperation and make plans for the next period. Forums can be organized once in each municipality.

Plan of promotional activities

A plan of promotional activities, taking into account all activities proposed by this programme, should contribute to:

- Extension of the tourist season in both municipalities
- Increasing the number of guests in the period October – April and attracting tourists with more money to spend and also foreign tourists
- Increasing average number of overnight stays in this period and extension of average stay

The following are initial recommendations for the creation of a consistent marketing system which should be applied in both municipalities:

| | |
|---|--|
| Creation of a unique umbrella brand | Sokobanja has built the brand „Green heart of Serbia“. However, this brand needs to be adapted to the winter tourist offer. Varshets – brand „The City of health“, also needs to be adapted to the winter offer |
| Professional management of the brand and marks | It is necessary to provide consistent and proper application of the brand and visual standards according to defined criteria |
| Rationalization of off -line advertising | Critically consider which media and advertising channels are the most efficient, through measurement and control according to the set key indicators of success. Care should be taken of the choice of channels given the dynamics of development of tourism products, and bearing in mind key markets and segments. |
| Revision of the existing and creation of new promotional materials | It is necessary to harmonize all materials (visually, in content and informatively), respecting newly created brands and their application |
| Development of multimedia base | Create an attractive database of multimedia content, primarily photographs, which need to be constantly updated. |
| Focus on digital marketing | It is necessary to implement integrated online strategy which implies a combination of using social networks, <i>Google</i> services and <i>Newsletter</i> tools in an individual measure which corresponds to the behaviour of target group |
| Market research | Professional market research for the purpose of making business decisions and determining target markets and groups. |
| Creation of operating marketing plan and media plan | Defining tasks and tools in the function of continuous promotion of destinations and desired market positioning. |

Monitoring and Evaluation

Monitoring implies systematic and regular monitoring of progress in the implementation of the strategy and action plan and measurement of progress achieved during the observed period through monitoring of indicators. That is, monitoring observes the level of preparation of proposed projects and their implementation in relation to the plan.

Regular checking the progress of the Program should include persons in charge of operational management and implementation, as well as those in charge of making key decisions, from the adoption of the Program and approval of monitoring results to deciding on necessary corrective measures (i.e. Municipal Assembly and / or Monitoring Committee, Municipal Council). The progress made in the implementation of the Program should be presented in the annual implementation report.

Evaluation helps to determine the value of the Program and projects that have been implemented, but also to prepare a time frame for monitoring each activity defined by the program. It deals in more detail with various aspects, e.g. assesses what benefits have been achieved for citizens, what reasons have led to success or failure and what has been learned along the way. The evaluation should provide meaningful recommendations for ongoing interventions or strategic planning in the future. It is proposed to conduct a continuous evaluation during the implementation of the Program by the Municipal Council, in order to update the Program itself, given that the Program was created for a ten-year period, as well as ex-post evaluation after the period.



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