

## THE CURRENT STATE OF VARIOUS CHARACTERISTICS RELATED TO THE WINE MARKET IN THE REPUBLIC OF MACEDONIA

### TRENTNO STANJE RAZLIČITIH KARAKTERISTIKA KOJE SE ODNOSI NA TRŽIŠTE VINA U MAKEDONIJI

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**Abstract:** *The purpose of this paper is to present qualitative and quantitative research of the Macedonian wine market with emphasis on exact data.*

*The research was conducted in order to get a clear picture of the current state of various characteristics related to the wine market in Macedonia from the view point of its citizens. It is based on analysis of telephone interviews, conducted on a representative sample of 1007 respondents, as well as four focus groups with different groups of citizens, conducted in October 2014. The analysis of the survey is concentrated on more segments on the market for alcoholic beverages, with particular reference to wine.*

**Key words:** *Qualitative and quantitative research, wine market.*

**Sadržaj:** *Istraživanje je sprovedeno u cilju dobijanja jasne slike o trenutnom stanju različitih specifičnosti vezanih za tržište vina u Makedoniji iz perspektive njenih građana. Isto se zasniva na analizi koja je izvršena putem telefonskih razgovora, a koja je sprovedena na reprezentativnom uzorku od 1007 ispitanika, kao i četiri fokus grupe sa različitim grupama građana. Istraživanje je sprovedeno u oktobru 2014 godine. Analiza istraživanja je koncentrisana na više tržišnih segmenata alkoholnih pića sa posebnim osvrtom na tržište vina.*

**Ključne reči:** *Kvalitativna i kvantitativna istraživanja, tržišta vina.*

#### 1. INTRODUCTION

Current market conditions imposed fulfilling the wishes and needs of customers / consumers and analysis of the position of the competitors and their strategy. The building of the policy and strategy of a company including best practices, using a benchmarking strategy should not turn into imitation, a direct copy of a competitor practice or direct support of competing products, which are still a massive phenomenon and trend here, as well as a way for manipulation of buyers / consumers [1]. Direct copying the competitor leads to uninventive approach suppression of one's own creativity, breaking its own labor standards [2].

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Successful companies use benchmarking as an opportunity for creation, not a way to imitate the competition [3]. In this way, benchmarking is a useful method in the management of quality, especially for recognition and continuous measurement of the gap between the internal and the external best practice and for establishing measurable dynamic standards and based on these measurements builds policy and strategy for the organization [4].

The demand for high quality products / services imposes not only purchasing new equipment, but investment in education and training of employees, reengineering the business processes and continuous improvement of the quality system [5]. The intense competition will be endured by those companies that are well organized, have a qualified human capital, investing in education and training of employees, which invest in improving the business processes and invest in innovation organizations. Marketing activities in Macedonian companies need to focus on enriching the range and quality of the products, determining the existing markets and winning new, richer partnerships with foreign partners [6].

In order for a company to successfully obtain knowledge of its position and the position of their products in the market, it is necessary to collect and adequately evaluate the data and parameters of the consumers, their experiences and expectations in terms of product and their degree of the pleasure of using said product. Listening to the wishes, needs of customers / users and of the companies, trying to meet their needs will increase the satisfaction of the consumers and will provide a competitive advantage [7], [8], [9].

Collecting data for customer satisfaction for the quality of the products should show what measures should be taken in order for the companies to improve customer satisfaction. Sources of measurement can be the objections, complaints, inquiries, debates and more.

In order to improve the company's products, it is important for the benevolent objections or claims of the customers not to be interpreted incorrectly and continuous monitoring of their satisfaction should be established, that will give a valuable source of information for business analysis, as well as management of such information [10].

## 2. RESEARCH METHODS

The purpose of this paper is to design a global survey on the Macedonian market of alcoholic drinks with specific reference to wine in order to make:

- assessment of the size of the market, its segmentation, trends and potentials;
- profile of consumers/non-consumers of different types of alcoholic beverages;



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- determining the perceptions, experiences, habits, attitudes, needs and expectations of the different profiles of consumers;
- recognition of certain brands and product competition;
- to determine the image of other competing brands in the market;
- determining the process of making a decision to purchase a particular product;
- defining the sensitivity of prices and their relationship with the offered quality.

In accordance with the objectives of the research, in the preparatory stage the overall population in the country was covered and it served as the basis for creating a sample which was further included in the survey.

This research used a combination of quantitative methodology in ad hoc research where the interviews took place with CATI telephone system and qualitative methodology for in-depth focus group discussions. The research was based on analysis of telephone interviews, conducted on a representative sample of 1007 respondents, as well as four focus groups of different groups of citizens, conducted in October 2014.

Using this type of combined methodology, allows statistical reliability to present data rates (profiles, categories, grades, which consumers / non-consumers have on the topic), and provides qualitative information on perceptions, experiences, opinions and attitudes of respondents. Using the combined methodology allows us to quantify different situations and conditions that apply to certain wine companies and their competition and depth to penetrate the determination of the reasons for the same. In any case, this methodology allowed the creation of a much clearer picture of all the specifics of interest.

### 3. ANALYSIS OF RESULTS

The analysis of the quantitative part of the survey showed that approximately one third of the Macedonian population does not consume alcoholic beverages at all. A cross analysis on the same issue with the demographic data of respondents was made and the conclusion was that for the average value (33.3%) for those who do not consume alcohol, there are exceptions for certain groups with similar demographic characteristics, Table 1.

Base: All participants		Do they consume alcohol	
		Yes	No
Total (average for the whole population)		67.0%	33.0%
Gender	Male	72.1%	27.9%
	Female	60.3%	39.7%
Nationality	Macedonian	69.4%	30.6%
	Albanian	58.5%	41.5%
Age	15-20 years	67.6%	32.4%
	20-30 years	75.3%	24.7%
	30-40 years	73.6%	26.4%
	40-50 years	67.2%	32.8%
	50-60 years	59.9%	61.1%
	60-70 years	57.0%	43.0%
	Over 70 years	30.4%	69.6%
Type of settlement	Urban	69.0%	31.0%
	Suburban	57.5%	42.5%
	Rural	48.6%	51.4%
Monthly income	Up to 15 000 denars	59.6%	40.4%

	About 30 000 denars	70.4%	29.6%
	Over 60000 denars	86.4%	15.6%
Education	Primary and lower	45.7%	54.3%
	Secondary	65.1%	34.9%
	Higher education	75.2%	24.8%
	Masters/ PhD	75.0%	25.0%

**Table 1:** Cross-analysis regarding the question whether they are consumers of alcohol

Deviations among certain groups with similar demographic characteristics were found within the Albanian population whose representatives in 41.5% of cases reported that they do not consume alcohol. These results should not be surprising, considering the canons of their religion regarding this issue. It should also be emphasized that younger generations largely defy such rules and significantly deviate from the average, which is evident only for the Albanian community. In the analysis of only young Albanians, the share of those who consume alcohol is close to the average for the whole population in the country.

In the same cross-analysis, one can come to the conclusion that the representatives of the female population consume significantly less alcohol than men. Other groups with similar demographic characteristics affecting the average of those who did not consume alcohol, are citizens over 50 years of age, with a particular emphasis on the oldest population over 70 years, whose representatives, almost 70% of cases reported that they not consume alcohol.

In the list of those with a greater extent than the average for the whole population that does not consume alcohol are representatives of suburban and rural areas, as well as representatives of the group of people with the lowest incomes and those with the lowest levels of education. The assumption is that the lower level of alcohol consumption in these two groups of citizens is greatly affected economic factor.

On the other hand, the groups of those who drink more than the average for the whole population are young people between 20 and 30 years that exceed the national average (66.7%). The average of those who consume alcohol in this group is approximately 74% of the total. A similar proportion (75%) of those who consume alcohol, are observed in the group of citizens with higher education. In a similar sense the most distinguished group of citizens is the one with monthly family incomes above 60,000 denars. Within this group, over 86% of its representatives said they consume alcohol.

The next analysis, specifically addresses the case of wine. Under it, the number of those who did not consume wine is 45.5% of all people in the country. From further analysis of the same issue, it appears that the number of those who do not consume wine is greater than the number of those who do consume alcohol. In other words, the group of those who consume alcohol, there are those who do not consume wine. Expressed in percentage means that 18.3% of those who consume alcohol, do not consume wine.

Cross analysis of the issue of drinking wine again emphasizes certain groups of people with the same demographic characteristics that are reported differently than the mean for all citizens in the country (Table 2). And this time, the Albanian population is distinguished by a greater number of those who do not consume wine (56.9%), compared with the average value (45.5%) for the entire population. Comparable part of those who do not consume wine can be seen within the group of people between 60-70 years (47.7%). A remarkably small group composed of wine drinkers are the citizens with the lowest level of education. Within this group, 67.4% reported that they did not consume wine. The biggest group with non-wine

drinkers, it's the group with representatives that have over 70 years, where 82.6% of them answered negatively to the question: "Do you consume wine?". On the other hand, the groups of those who consume wine, above the average for the total population are the age groups between 20-30 and 40-50 years, where approximately 61% of them said they consume wine. A similar proportion of consumers of wine is found between those with higher education and those with monthly incomes above 60,000 denars.

Base: All participants		Do they consume wine	
		Yes	No
Total (average for the whole population)		54.7%	45.3%
Gender	Male	57.9%	42.1%
	Female	50.4%	49.6%
Nationality	Macedonian	58.2%	41.8%
	Albanian	43.1%	59.6%
Age	15-20 years	51.5%	48.5%
	20-30 years	61.0%	39.0%
	30-40 years	57.0%	43.0%
	40-50 years	61.6%	38.4%
	50-60 years	49.0%	51.0%
	60-70 years	47.7%	52.3%
	over 70 years	17.4%	82.6%
Type of settlement	Urban	56.5%	43.5%
	Suburban	47.0%	53.0%
	Rural	37.8%	62.2%
Monthly income	Up to 15 000 denars	48.4%	51.6%
	About 30 000 denars	58.6%	41.4%
	Over 60 000 denars	63.6%	36.4%
Education	Primary and lower	32.6%	67.4%
	Secondary	53.5%	46.5%
	Higher education	64.3%	35.7%
	Masters/ PhD	58.3%	41.7%

Table 2: Cross-analysis regarding the question whether they consume wine

Within this segment of the study the profile of wine consumers was determined (Table 3), as well as the analysis that determine the different types of users. From the responses of the respondents 73.2% said that they only occasionally consume wine, while the remaining 26.8% said that there are love wine.

Base: All participants that drink wine		Said that they:	
		Love wine	Consume wine occasionally
Total (average for the whole population)		26.8%	73.2%
Gender	Male	31.8%	68.2%
	Female	20.0%	80.0%
Nationality	Macedonian	29.3%	70.7%
	Albanian	16.8%	83.2%
Age	15-20 years	20.6%	79.4%
	20-30 years	28.2%	71.8%
	30-40 years	16.5%	83.5%
	40-50 years	31.2%	68.8%
	50-60 years	32.9%	67.1%
	60-70 years	31.4%	68.6%

	Over 70 years	25.0%	75.0%
Type of settlement	Urban	27.6%	72.4%
	Suburban	19.0%	81.0%
	Rural	35.7%	64.3%
Monthly income	Up to 15 000 denars	25.4%	74.6%
	About 30 000 denars	27.6%	73.4%
	Over 60 000 denars	28.6%	72.4%
Education	Primary and lower	22.6%	77.4%
	Secondary	22.7%	77.3%
	Higher education	35.7%	64.3%
	Masters/ PhD	28.6%	71.4%

**Table 3:** Cross-analysis regarding the profile of wine consumers

As "big fans" with higher than the state average are the representatives who live in rural areas, where 35.7% of them said that they belong to this group. To the same extent, (35.7%) of the group of highly educated representatives said that they were major wine lovers.

Unlike the "big fans" of wine, the size of the group of occasional users most affect the following groups: women, Albanian youth aged 15-20 years and adults between 30-40 years. The other groups according to the demographics are within the average for the total population.

According to the frequency of consumption (Table 4), the proportion of the population who drink wine, can be divided into several groups. The biggest is the group of those who consume wine a few times a month (36.7%). Next is the group of those who drink wine at least once a week (35.8%). Smaller is the group of those who consume wine less than a few times a month (19%), and the lowest is the group of those who consume wine daily (8.6%).

Base: All participants that drink wine		Wine consumption frequency			
		Every day	Once a week	Several times a month	Rarely
Total (average for the whole population)		8.4%	36.0%	36.5%	19.1%
Gender	Male	9.8%	37.9%	35.0%	17.4%
	Female	6.9%	32.9%	39.0%	21.2%
Nationality	Macedonian	10.2%	38.3%	35.6%	15.9%
	Albanian	1.9%	25.2%	41.1%	31.8%
Age	15-20 years	5.7%	37.1%	42.9%	14.3%
	20-30 years	2.5%	41.4%	35.2%	21.0%
	30-40 years	6.4%	31.8%	41.8%	20.0%
	40-50 years	11.9%	31.2%	39.4%	17.4%
	50-60 years	12.5%	37.5%	33.3%	16.7%
	60-70 years	19.6%	33.3%	27.5%	19.6%
Type of settlement	Over 70 years	25.0%	25.0%	25.0%	25.0%
	Urban	8.9%	34.5%	36.9%	19.7%
	Suburban	3.2%	48.4%	37.1%	11.3%
Monthly income	Rural	21.4%	21.4%	28.6%	28.6%
	Up to 15 000 denars	9.0%	32.7%	39.8%	18.5%
	About 30 000 denars	8.8%	36.9%	34.9%	19.3%
Education	Over 60 000 denars	4.8%	42.9%	33.3%	19.0%
	Primary and lower	16.7%	26.7%	36.7%	20.0%
	Secondary	6.5%	33.8%	38.8%	20.9%

	Higher education	11.8%	40.4%	32.7%	15.8%
	Masters/ PhD	14.3%	57.1%	28.6%	

**Table 4:** Cross-analysis regarding the question of frequency of consumption

From the perspective of different demographic groups in the context of the same issue, it is important to note that respondents Albanians again deviate from the average for the total population in the country. Only 1.9% of Albanians declared that they consume wine every day which is much less than numbers of the Macedonians (10.2%).

The following analysis is part of the research that refers to the average amount of wine consumption (Table 5), by the citizens in individual cases. According to it, it can be concluded that most of the population (approximately 70%) in individual cases, consumes 1 to 2 glasses of wine. It is important to note that the average is mostly affected by females, since among them is the greatest deviation from the average. Under cross-analyzes, more than half of the women declared that do not drink more than one glass of wine.

Base: All subjects that drink vine		Quantity(number of glasses)								
		1	2	3	4	5	6	7	10	20
Total(population average)		37.0%	33.3%	16.5%	4.8%	5.3%	1.1%	0.4%	1.5%	0.2%
Gender	Male	23.0%	36.5%	20.8%	6.6%	8.2%	1.9%	0.6%	2.2%	0.3%
	Female	56.7%	28.6%	10.8%	2.2%	1.3%			0.4%	
Nationality	Macedonian	43.0%	33.0%	15.4%	4.1%	3.8%	0.2%	0.2%	0.2%	
	Albanian	13.1%	33.6%	21.5%	7.5%	11.2%	4.7%	0.9%	6.5%	0.9%
Age	15-20 Years	37.1%	34.3%	11.4%	5.7%	5.7%		2.9%	2.9%	
	20-30 Years	25.2%	35.6%	21.5%	8.0%	8.6%			1.2%	
	30-40 Years	36.4%	30.9%	15.5%	3.6%	9.1%	1.8%	0.9%	1.8%	
	40-50 Years	35.8%	37.6%	15.6%	3.7%	2.8%	2.8%		0.9%	0.9%
	50-60 Years	54.2%	27.8%	9.7%	4.2%		1.4%		2.8%	
	60-70 Years	56.9%	31.4%	11.8%						
Type of settlement	Urban	36.7%	33.7%	15.7%	5.1%	5.9%	1.1%	0.2%	1.5%	0.2%
	Suburban	39.7%	33.3%	19.0%	1.6%	1.6%	1.6%	1.6%	1.6%	
	Rural	42.9%	14.3%	35.7%	7.1%					
Monthly income	Up to 15000 denars	46.7%	30.7%	14.6%	4.7%	1.9%	0.5%	0.9%		
	About 30000 denars	32.2%	35.6%	18.3%	3.4%	7.5%	0.7%		2.0%	0.3%
	Over 60000 denars	23.8%	28.6%	14.3%	14.3%	7.1%	7.1%		4.8%	
Education	Primary and lower	36.7%	26.7%	16.7%	20.0%	13.3%		6.7%		
	Secondary	39.6%	30.8%	17.0%	4.7%	4.7%	1.5%		1.5%	0.3%
	Higher education	32.7%	38.0%	16.4%	5.8%	4.7%	0.6%		1.8%	
	Masters/ PhD	28.6%	57.1%			14.3%				

**Table 5:** Cross-analysis on the matter to the average amount of wine consumption

According to the same analysis it can be concluded that the rare cases when women drink more than three glasses of wine on individual consumption. In contrast, only 25% of men reported that in individual consumption they drink just one glass of wine.

In terms of different demographic groups on the issue, it is interesting to note that in the case the Albanians as a group are distinguished by the number of drunk cups in individual consumption. This leads to the conclusion that the Albanian population there is an evident contrast, which on the one hand is manifested in the growing number of those who did not

consume wine and consumed less than others. But on the other hand, there is an obvious fact that the representatives of the Albanian population who consume wine, do in larger amounts than other populations. Unlike the Albanians who on average drink 3.5 glasses, for the Macedonians that number is 2. Men drink on average less than 3 glasses and women over a glass and a half.

In terms of the preferences of citizens to a certain type of wine, it can be concluded that to the Macedonian citizens red wine is a favorite in relation to others. This conclusion is confirmed by the fact that more than half of those surveyed said they usually consume red wine (Table 6). White wine is consumed by nearly one third of the population. For about 12% of the population, there are no rules on this issue. Rosé wine is consumed by 5% of the population, and sparkling wine only by 0.2%.

Base: All wine consumers		Type of wine				
		White	Red	Rosé	Sparkling	No rules
Total(Population average)		28.1%	54.4%	5.1%	0.2%	12.1%
Gender	Male	30.4%	51.6%	4.1%		13.9%
	Female	25.1%	58.4%	6.5%	0.4%	9.5%
Nationality	Macedonian	29.1%	53.6%	6.1%	0.2%	10.9%
	Albanian	24.3%	57.9%	0.9%		16.8%
Age	15-20 years	17.1%	74.3%	2.9%		5.7%
	20-30 years	25.9%	62.3%	2.5%		9.3%
	30-40 years	30.0%	52.7%	4.5%		12.7%
	40-50 years	30.3%	51.4%	5.5%	0.9%	11.9%
	50-60 years	29.2%	44.4%	8.3%		18.1%
	60-70 years	34.0%	48.0%	4.0%		14.0%
	Over 70 years	12.5%	12.5%	50.0%		25.0%
Type of settlement	Urban	27.4%	55.2%	4.9%	0.2%	12.3%
	Suburban	37.1%	51.6%	4.8%		6.5%
	Rural	14.3%	42.9%	14.3%		28.6%
Monthly income	Up to 15 000 denars	29.0%	53.3%	5.7%		11.9%
	About 30 000 denars	27.5%	56.3%	5.1%	0.3%	10.8%
	Over 60 000 denars	28.6%	47.6%	2.4%		21.4%
Education	Primary and lower	26.7%	63.3%			10.0%
	Secondary	27.9%	53.2%	5.9%	0.3%	12.6%
	Higher education	28.8%	55.9%	4.7%		10.6%
	Masters/ PhD	28.6%	42.9%			28.6%

**Table 6:** Cross-analysis on the issue of preference to a particular type of wine

In terms of qualitative research a detailed data about the importance of wine in the broader context of alcoholic beverages is following. The analysis of the materials obtained in the focus group discussions with the four categories of respondents (men aged 18-30 and women aged 18-30 years, men aged 30-50 years and women aged 30-50 years), indicates that the wine has a specific position in relation to other alcoholic beverages.

The survey that we carried out on the wine market in Macedonia, in addition to creating a clear picture of the market structure in terms of customers was also used for determining the groups of different types of users with different potential for increasing the volume of the market in the future. In the context of potential sales increase, the analysis in the study had several target groups with different levels of potential.



**Target group A)** did not consume alcohol. Although this type of citizens can somewhat be treated as potential customers, it cannot be expected especially in the short term that they would begin to consume alcoholic beverages including wine. For this group it can be said that there is the least potential to increase the volume of the market and the market share of XYZ. For these reasons we believe that the marketing activities that will be undertaken in the future, this target group should not be given a significant focus.

**Target B)** consumed alcohol, but does not drink wine. Because of the default strategy, within the research study we weren't able to discover the reasons for this situation, but the fact is that a significant proportion of about 20% of all who consume alcohol do not consume wine. For accurate determination of the reasons for this situation, in order to develop a specific strategy in the future and approach this type of potential users a specific research that would focus specifically with this type of potential consumers should be prepared. In any case, the target can be treated with medium levels of potential to increase the volume of the market and the market of the XYZ in the future.

**Target group B)** consumes wine. According to our calculations and according to statistics from other sources (Wine Institute of California), the consumption of wine in Macedonia per capita is approximately 10-12 liters annually. According to the California Institute of the average annual consumption of wine per capita is much higher in some countries in the region (43.77 liters of Slovenia, Croatia 42.27 liters, Hungary 33.6 liters, 26.9 liters of Romania, Greece 22.9 liters, Bulgaria 18.96 liters). Because a similar lifestyle as well as a similar mentality of our citizens with some of these countries, it can be concluded that there is potential to increase the volume on the Macedonian market. With a proper strategy to existing consumers, wine can be imposed and positioned higher on the list of preferred alcoholic beverage. Hence we believe that marketing activities should primarily be focused on the existing consumers of wine at the same time we feel that those carry the greatest potential for incensement of sales. The group with the highest potential for increasing the volume of wine consumption, was the one that consisted of subjects with up to 30 years of age. It was already concluded that this group of users has created a very positive image for wine, but that it does not fully coincide in the typical situations for alcohol consumption typical of them.

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