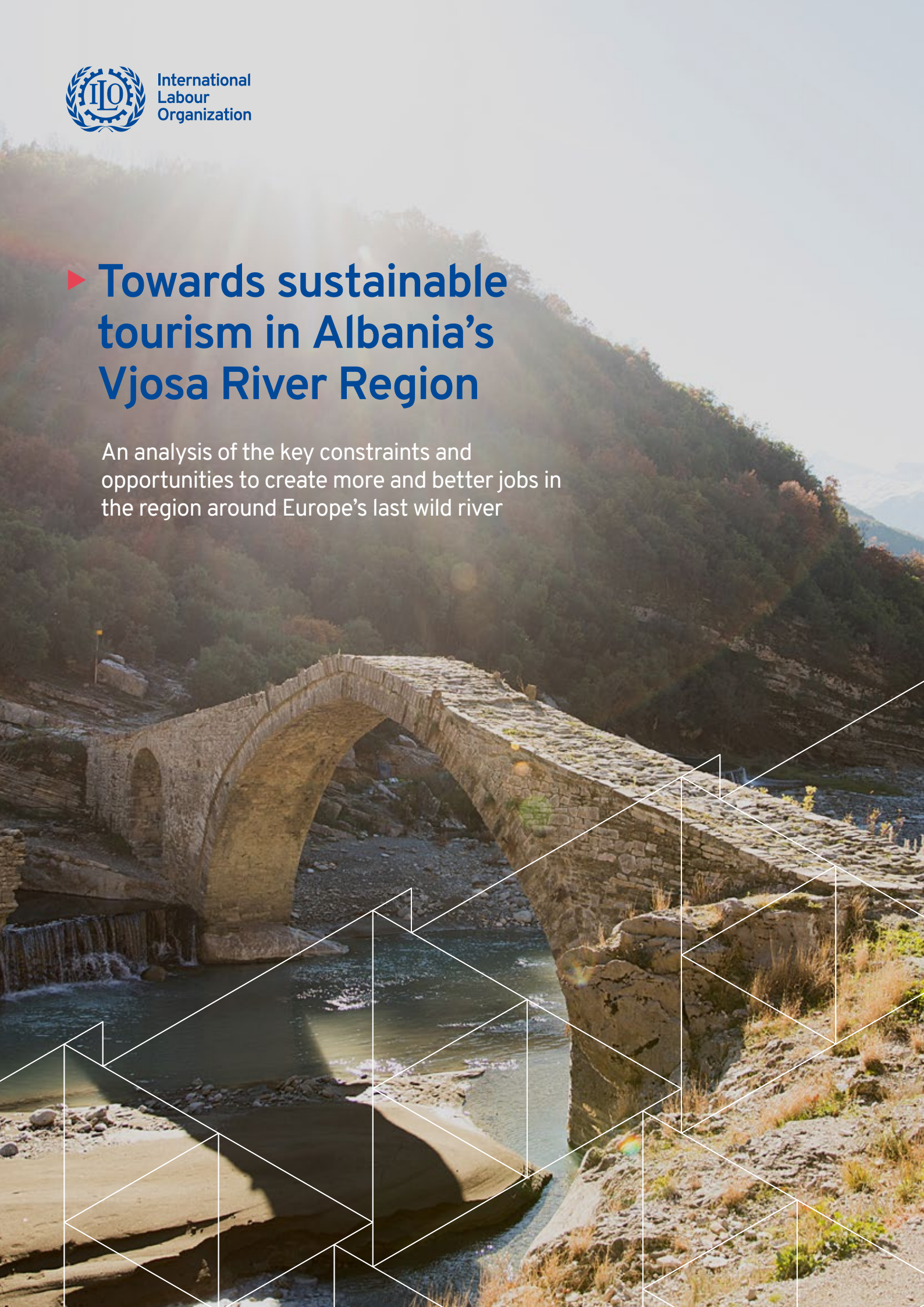




International
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► Towards sustainable tourism in Albania's Vjosa River Region

An analysis of the key constraints and
opportunities to create more and better jobs in
the region around Europe's last wild river



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Towards sustainable tourism in Albania's Vjosa River Region

An analysis of the key constraints and opportunities to create more and better jobs in the region around Europe's last wild river



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Abbreviations

ADF	Albanian Development Fund
ALCDF	Albanian Local Capacity Development Foundation
ATOA	Albanian Tour Operators Association
CESVI	One of the biggest humanitarian organizations in Italy
DMO	Destination management organization
EU	European Union
FIT	Free independent traveller
GOA	Government of Albania
ILO	International Labour Organization
MTE	Ministry of Tourism and Environment in Albania
MSA	Market Systems Analysis
NATGA	National Association of Tourist Guides of Albania
NGO	Non-governmental organization
OSH	Occupational safety and health
RisiAlbania	Project supported by the Swiss Agency for Development and Cooperation (SDC)
RMA	Rapid Market Assessment
SDG	Sustainable Development Goal
SECO	Swiss State Secretariat for Economic Affairs
SME	Small and medium-sized enterprise
USD	US dollar
USP	Unique selling proposition



Executive summary

The International Labour Organization (ILO) was contracted to conduct a market systems analysis of the tourism sector in the upper basin of the Vjosa River, “the last wild river in Europe”. This study analyses the tourism market in the Gjirokastra region, including its key constraints and their causes. It concludes with a series of potential interventions that, if implemented, could create more and better employment opportunities for women and young people in the Gjirokastra region.

Tourism in Albania has started to develop substantially over the past 20 years, with an annual growth rate of about 10–15 per cent. The number of visitors has risen from a few thousand 20 years ago to 6.4 million visitors in 2019. Gjirokastra region is one of the main tourism centres in Albania, with Gjirokastra town as its main attraction. Përmet is the second principal attraction in the region, and it is known for its food, river rafting, outdoor excursions and traditional Saze music.

While growth has been substantial in recent years, the onset of COVID-19 has hit the tourism sector about as hard as any other. Some tour operators oriented toward the foreign market indicate that their revenue is down 90 per cent from 2019. But while COVID-19 has been devastating overall, Përmet has at least seen some growth from domestic tourism, presenting a new opportunity to capitalize on for a post-COVID-19 recovery and to support “building back better”.

But in order to build back better, one must first understand the sector’s key constraints in terms of both sectoral growth, and more and better jobs for women and young people. In unpacking the key constraints, limited market research, marketing and product development restrict market actors’ ability to understand demand segments, actively target them and develop products that can generate maximum value and experience. Sectoral coordination, which is in its infancy but fast-improving, could be more impactful in lobbying for and marketing the destination offer. Skills are universally recognized as a key constraint – they are lacking in just about every business and at all levels – principally due to high turnover and labour migration, and because the region offers few tourism-oriented training. Looking at the regulatory side, tourism law is sometimes opaque, with limited enforcement, which limits quality control.

Despite these constraints, the tourism market has room to grow and develop. To support that growth, a potential intervention strategy has been developed that addresses four key constraints: improved marketing, product development, better market research and sectoral coordination. Here, the idea is to develop a coherent brand and marketing strategy to target both the domestic and the international tour-based markets. Hand in hand with this is a plan to develop products that can support the new branding and add more value to the offer. These first two suggested interventions could be better addressed through improved market research capacities that help develop a tourist registry. The fourth idea is to support existing regional tourism associations to foster their self-sufficiency, without donor funding. The aim is to enhance voice within the region to market, lobby for changes, create mutual synergies with other destinations, and protect its greatest asset, the Vjosa River, from environmental degradation.



▶ 01



Introduction

Project introduction

The International Labour Organization (ILO) was contracted to conduct an analysis of the tourism sector in the upper basin of the Vjosa River and evaluate its sustainability, as well as employment opportunities, paying particular attention to female entrepreneurs. This has been accomplished through a market systems analysis of the tourism sector in the region.

The funds for the intervention come from the Norwegian Government, which supports the SDG Acceleration Fund in Albania aimed at facilitating the achievement of the Sustainable Development Goals (SDGs) by 2030. To help accelerate attainment of the SDG targets under this Fund, the ILO joined forces with other UN agencies, to design and implement a holistic, environmentally friendly intervention in the upper basin of the Vjosa River, often referred to as "Europe's last wild river" (River Watch 2018). In this framework, the ILO received funding to conduct research on the labour market opportunities in the green economy in the location in question, which is located in the Gjirokastra region in Southern Albania.

Using the market systems analysis (MSA) methodology, root causes that hinder growth are unpacked to try to explain why markets – such as sustainable tourism – may not meet the needs of certain population subsets, including those living in poverty, as well as women and other disadvantaged groups. By understanding these constraints, actionable results are identified that help enterprises overcome barriers to expanding their businesses and that may lead to sustainable growth within the researched value chain. Subsequently, potential is revealed for new and/or improved employment opportunities, as

enterprises require additional capacities. A market systems analysis looks to make recommendations on interventions that promote local ownership to ensure continuity beyond interventions funded by external actors. The focus is accordingly on the capacities and incentives of market actors – both private and public – to address the causes of key market challenges.

According to the latest statistics, the total population of the Gjirokastra region is 61,423, of which 51 per cent are women. In the past five years the population has declined by 14.7 per cent, mainly because of internal and external migration.¹ The median age is 39.4 years, which makes the population in the Gjirokastra region the oldest in the country.² The aging population has lowered the proportion of working-age people, resulting in staff and skills shortages in all industries, including tourism and hospitality.

In accordance with the information provided, the objective of this study – whose methodology is henceforth referred to as market systems analysis (MSA) – is to identify both constraints on, as well as opportunities for enhancing the tourism sector in the upper basin of the Vjosa River, with a particular focus on women, young people and sustainability.

First, this market systems analysis reviews the tourism sector's structure. Afterwards, the key constraints on decent work and growth are considered, with tourism as the core value chain, as well as its supporting functions (marketing, coordination, market research, skills, product development and financial services) and the rules and regulations that govern this value chain. As a final step, the opportunities are identified by examining the key market actors and potential areas for intervention to be considered for future projects.

¹ Population by region, Albanian Institute of Statistics, 2020.

² Ibid.

Study purpose and scope

Project Scope Snapshot

Target group: Women and young people

Sector: Sustainable tourism

Geography: Upper Vjosa River Basin
(in the Gjirokastra region)

This analysis will serve to support project partners, as well as national actors to understand where opportunities lie in sustainable tourism in the Gjirokastra region, potentially leading to more employment opportunities and increased incomes for workers.

To do this, the scope of this MSA encompasses:

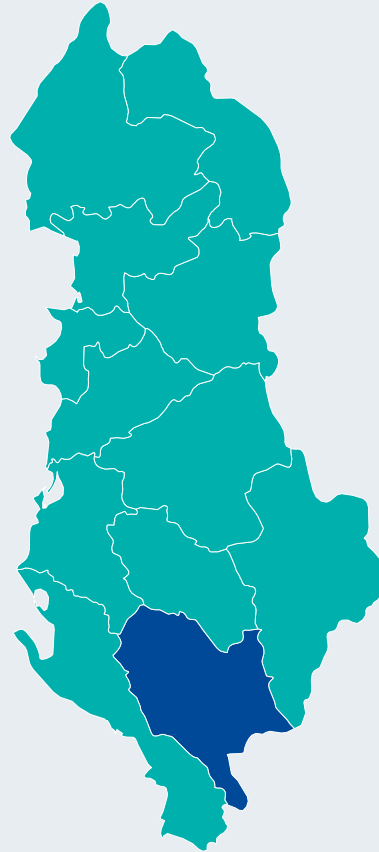
- ▶ understanding the core constraints on women and young people in the tourism value chain in the Gjirokastra region;
- ▶ identifying the root causes of these constraints;
- ▶ making recommendations that (i) support more and better jobs for women and young people, and (ii) can create enterprise growth.

This MSA builds on an internal ILO assessment in December 2019, during which tourism was considered to be the most promising sector for boosting economic growth, and generating and improving employment in the region.

Relative to geographic scope, the Gjirokastra region is located in the southern part of Albania, as can be seen in Figure 1. The area borders North-Western Greece and is close to the seaside town of Sarande on Albania's southern coast, which is a popular tourist destination. The region's capital is Gjirokastra town and it also includes the upper Vjosa River basin, which is centred around Përmet. While the geographic scope of this study is the Gjirokastra region as a whole, the analysis has gone fairly deeply into the upper Vjosa River region, and in particular, its principal population centre, Përmet.

To the extent possible, the analysis has tried to gain an understanding of the role of women-led social enterprises within the region. As Albanian law classifies social enterprises as non-profit organizations, however, many businesses that meet the social criteria are not counted as such. Thus, the penetration of such businesses in the region is quite low and the amount of information collected on them reflects this.

Figure 1: Gjirokastra region in Albania



Study methods

The research is based on the methods of the ILO's Value Chain Development for Decent Work guide and the Springfield Centre's Operational Guide on the M4P Approach. This means that the research uses different types of data (primary and secondary) and multiple data collection methods, such as secondary research review, semi-structured interviews and field observations to triangulate perceptions, biases and trends.

The research for this MSA was conducted between August and November 2020, with field research in September 2020. The research can be divided into two main phases:

- 1. PHASE I Desk research:** The available literature on the tourism sector in Albania and in this region in particular was used to obtain a deeper understanding of how the market functions and what its key stakeholders are, and to identify constraints and potential opportunities. This comprised a review of national laws, including the social entrepreneurship law, government strategies for the tourism sector, sectoral statistics, news articles and studies conducted by other development agencies.
- 2. PHASE II Field research:** Primary research and data collection were conducted in Tirana, Gjirokastra and Përmet during the second week of September 2020. Due to COVID-19 meeting restrictions, the field research consisted of both online and in-person interviews, with as many interviews as possible being conducted virtually. The field research consisted of 23 semi-structured interviews with national and local government officials, NGOs, formal and informal business owners, workers and other key industry informants. The range of businesses interviewed includes tour operators, hoteliers, restaurateurs, tour guides, and activity service providers. Particular attention was paid to ensure a gender balance in selecting the interviewees. Almost 45 per cent of the people interviewed were women, half of whom are entrepreneurs. For more information, a list of all organizations interviewed for this study is included in Annex A.

Report structure

The report first provides an overview of the tourism sector, how it has developed over time and how the various interactions along the value chain impact (women) workers (Section 2). It then looks beyond the value chain to the market system, its key constraints and their possible root causes (Section 3). The analysis findings are then used to develop a series of recommendations to address the identified root causes in a sustainable way (Section 4).

Research Notes

On confidentiality. All data collected through primary research have been made anonymous so that individuals cannot be identified. Instead, we refer in generic terms to "interviewee(s)", "informants" or "respondents".

On study limitations. The study is largely developed based on the perceptions and opinions of key sector stakeholders. Although information was triangulated by different sources, where possible, it is recognized that not all opinions and perceptions could be cross-checked and validated.

On views and opinions. The views and opinions in this assessment are those of the authors and not of the International Labour Organization or its Albanian offices.





02



Sector structure

History and trends

Tourism in Albania is a relatively new and emerging sector. After opening up to the Western world in the early 1990s, tourism only started picking up and growing in the past 20 years. Despite being largely closed to tourism until the turn of the century, the country has much to offer as a tourism destination. Albania has a rich history given its location at the crossroads between various empires (Greek, Roman, Ottoman) and is home to five UNESCO cultural sites, including one in Gjirokastra town³.

In just 20 years, the sector has gone from nascent to an economic engine. Up until 2019, Albania's tourism sector reported 10 consecutive years of steady annual growth, going from around 1 million international arrivals in 2007 (World Bank ND) to 6.4 million in 2019 (UNWTO 2020), an increase of more than 500 per cent. By 2019, tourism made up 21.2 per cent of Albania's GDP (around 2.85 billion euros [€]), 48.2 per cent of the country's exports and 22.2 per cent of total employment (WTTC 2019). As Figure 2 indicates, the number of foreign tourists grew by nearly 80 per cent in five years with annual growth ranging between 8–16 per cent (INSTAT 2020). This steep growth has been driven by Albanian-speaking tourists (from Kosovo⁴, North Macedonia, and Albanians living abroad), who arrive by land and head to the beaches.

But in-land tourism has also been increasing steadily. One of the principal tourist attractions in Gjirokastra region is the UNESCO site in Gjirokastra town, whose historic centre includes well-preserved buildings in the seventeenth century Ottoman architectural style, which draws both domestic and international tourists to the region. Përmet, the second largest town in the region, is becoming increasingly popular, mainly among outdoor tourists. While in the past, visitors to visit Përmet were based in Gjirokastra or came to the town as a stopover from Gjirokastra to Korca, which is part of the "grand tour"⁵ of many local tour operators, nowadays more tourists use Përmet as a base in which to stay overnight. One reason for this is that in the past ten years, local

tour operators from Përmet have developed tourist offers around outdoor activities, which makes the city and its surroundings a designated destination for river rafting, hiking and biking, as well as for culinary experiences. Therefore, although nascent, tourism is growing in Përmet, as can be seen in Figure 3⁶.

Figure 2: Foreign arrivals in Albania in the past five years

Foreign arrivals in Albania, for holiday or visiting relatives (millions)

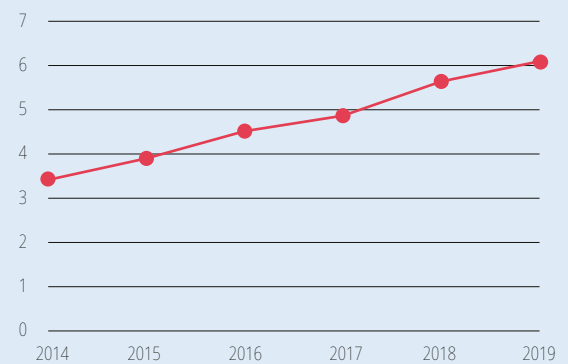
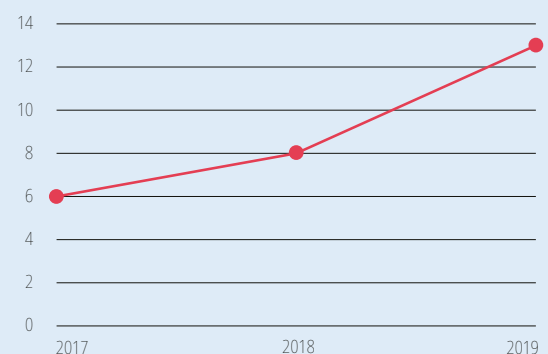


Figure 3: Number of tourists visiting Përmet

Number of tourists visiting Përmet (thousands)



³ Albania UNESCO site, <http://whc.unesco.org/en/statesparties/AL> (accessed 20/10/2020).

⁴ All references to Kosovo should be understood to be in the context of United Nations Security Council resolution 1244 (1999).

⁵ The grand tour is longer than the standard one-week tour around south-west Albania, and includes the eastern part of Albania, from Gjirokastra to Korca, to Tirana. It usually lasts up to two weeks.

⁶ Data provided by the interview with the Përmet tourism office.



Much of the tourism in Përmet and the region as a whole revolves around the Vjosa River. "The Vjosa and its tributaries are without par in Europe. There is no river network like this left on the continent ... this river landscape needs to be protected by the highest possible nature protection category" (Balkan Rivers ND). However, the natural beauty of the last wild river in Europe is threatened by dam construction plans. The concession of the Kalivaç dam was given in 1997 but construction has been stopped several times and the level of completion is still only 30 per cent. The Kalivaç dam project is the biggest threat to the Vjosa River and this ecosystem – the dam wall is supposed to be approximately 50 meters high, which would destroy the Vjosa in one blow. Various organizations, such as Riverwatch, EuroNatur, EcoAlbania, IUCN and other partners have been fighting for the preservation of the Vjosa for about eight years (MAVA Foundation 2020). In September 2020 Albanian Prime Minister Edi Rama announced in the media that he is in favour of establishing a Vjosa National Park and that the Kalivaç dam has been rejected as a project to be continued by the Minister for the Environment (Balkan Rivers 2020).

The COVID-19 pandemic has had a catastrophic impact on tourism in Albania as a whole, as well as the Gjirokastra region. According to a recent poll done by the Albanian Tour Operators Association (ATOA), 60 per cent of tour operators and travel agencies reported that they have had less than 10 per cent of their 2019 annual turnover in 2020. More than half of their employees have had to be laid off, mostly from tour operators, and about two in five respondents indicated that without governmental support, they would be bankrupt by the end of the year. And with no end to the pandemic in sight, the sector will be operating under adverse

conditions for the foreseeable future (Tirana Times 2020). Albania is experiencing a recession to which the decrease in tourism has greatly contributed, as it is one of the sectors most affected (OECD 2020). "In July 2020, the number of foreign tourists was found to have decreased by 61.5 per cent compared with the previous year" (OECD 2020: 2).

Despite this, out of crisis has come opportunity: 2020 has offered a shift from the international tourism market to the domestic one. Due to Covid-19, many people are looking for destinations far from the crowds, connecting with nature, where the risk of infection is lower and stress is replaced by recuperation, good food and spending quality time with the family. Përmet is one of the main tourism destinations of this kind in Albania, for which reason it has become a popular weekend getaway town for Albanians.

For the first time, in 2020 Përmet has welcomed more domestic tourists than international ones, which has raised awareness of the local offer and can potentially lend itself to building back more resiliently going forward. Local businesses indicate that the demand from domestic tourists was higher than their capacity during certain periods of summer, and that they sent clients to higher capacity Gjirokastra hotels for the first time. Besides the well-known culinary tradition of Përmet, many domestic tourists were attracted by activities such as horse riding, rafting, hiking and other outdoor activities. This shift has considerably absorbed the negative effects (especially the two-month closure in spring) of the impact of the COVID-19 pandemic for tourism businesses in Përmet, in contrast to the majority of tourism businesses in the rest of the country, which are suffering a lot due to COVID-19.

Market overview

The study area of this project is the Gjirokastra region in Albania, with a particular focus on the upper basin of the Vjosa River. Historically and today, Gjirokastra town is the principal tourist destination in the region but also within Albania as a whole. In 2005, the city was declared a "World Heritage Site" by UNESCO (UNESCO ND). The main attractions are the old town, a well-preserved Ottoman-style town, and the old houses, in which Ismail Kadare, a world-renowned Albanian author, and the communist leader, Enver Hoxha, used to live. Additionally, tourists can enjoy activities such as trekking, horse riding, jeep or buggy tours, rafting, in the nearby surroundings of the town, within Gjirokastra region (see Figure 4). Furthermore, the city and the region as a whole are famous for good food and the hospitality of its people (Visit Gjirokastra. ND a).

Within the upper Vjosa River region, the tourism hub is Përmet. Përmet municipality has a population of around 20,000, half of whom live in Përmet town⁸. The principal attraction is the Vjosa River and its canyons – "Europe's last wild river" (River Watch 2019). This has helped to stimulate white-water rafting and has served as a pull to nature-based tourism in and around Hotova National Park. Besides the town, other tourism attractions of Përmet include: the thermal waters of Benja, the Vjosa River with the canyons of Lengarica and Benja, the churches of Leusa and Kosina, Hotova National Park with the rare Mediterranean fir, Alipostivani tekke⁹, the House of the Frashëri brothers and the old arched bridges of Katiu or Benja.

"Every time we bring people to the region, they love the river the most."

► Tour operator

Gjirokastra and Përmet are known among Albanians for their culinary culture, which is one of the unique selling points of Përmet in particular. To build on this reputation and boost economic growth, some Përmet businesses have joined a Slow Food Movement, which has about 80 members throughout the country and a

Figure 4: Map of Upper Vjosa River⁷



Slow Food Alliance, which has as members 27 important Albanian chefs (Slow Food Foundation ND). The Slow Food Movement is a broader initiative in which everybody is directly or indirectly connected to food production (restaurants, agribusinesses); the Slow Food Alliance is more selective, including only the best restaurant chefs¹⁰.

Four principal villages surround Përmet, namely Leus, Kosina, Maleshova and Peshtan. These four villages are part of the "100 Village Programme", which the Albanian Government launched in 2018 (Prime Minister's Office 2020a). It includes the coordination of multi-sectoral development interventions in the first 100 villages selected to have high potential for socio-economic development, agri-tourism and rural tourism, nature and the environment, as well as cultural heritage.

Leus is positioned on a hill only 2 km from Përmet. It is well known for the original church of Saint Mary built in the eighteenth century over the remains of an older structure dating to the reign of Byzantine Emperor Justinian I in the seventh and eight centuries (Smile Albania NDa). Due to its close proximity and beautiful setting in the hills, as well as its historic church, Leus is the most visited village in Përmet.

Kosina is also very close to Përmet, only 8 km on the national road connecting Përmet to Kelcyra. It is known for the second oldest church in the Balkans, which

⁷ Source: Spase Shumka, *The Vjosa catchment – a natural heritage - Scientific Figure on ResearchGate*. Available from: https://www.researchgate.net/figure/Vjosa-river-network-with-the-most-important-inhabited-centers-Abb-1-Vjosa-Flussnetz_fig1_329118705 (accessed 08/11/2020).

⁸ Përmet municipality site http://www.bashkiapermet.gov.al/?page_id=614 (accessed 02/10/2020).

⁹ Tekke is a monastery of dervishes, members of the Bektashi religion, which is well represented in Albania.

¹⁰ From an interview with a restaurant owner in Përmet.

has been recently restored: "The 500-year old Saint Maria's Sleep Church in the village of Kosine ... has been restored to its former cultural and architectural glory and values" (Prime Minister's Office 2020b).

Maleshova is situated close to Kelcyra town and about 27 km from Përmet. It is well known for its history and patriotic population, fighting for freedom for centuries. Maleshova has a beautiful natural landscape, including canyons, waterfalls, caves and national parks. One can also discover historic bridges and cultural heritage buildings (Visit Gjirokastra ND c).

Peshtan is a village in Tepelene, and is an entry point to the Zagori Valley and trails, which connect Përmet with Gjirokastra. The old name of Peshtan means "roses", due to the many roses that grow there. Peshtan is well-known for religious coexistence and tolerance: its people of the Orthodox, Bektashi and Muslim religions have lived there together in harmony for centuries (Smile Albania NDb).

Prominent sectoral actors

The tourism offer is shaped by various public and private stakeholders, as well as donor-funded projects. For example, there is the National Strategy for the Sustainable Development of Tourism 2019–2023 (Minister of Tourism and the Environment 2019), which was approved in June 2019 to continue supporting the growth of the tourism sector. Furthermore, an Integrated Rural Development Programme – the 100 Village Programme¹¹ – coordinates development interventions targeted toward 100 villages with high potential for socio-economic development, agro-tourism and rural tourism, nature and the environment, and cultural heritage. Regionally, the Minister of the Environment recently announced plans to establish a Vjosa National Park that would protect the Vjosa River from dam construction and thereby support the conservation of the environment.

Privately, tourist demand has been met by an increase in activity offers, more guesthouses and hotels, as well as restaurants, mostly financed by Albanians.

Also, donor-funded projects have helped to catalyse tourism. The Visit Gjirokastra Association is one of the main tourism stakeholders in the region. It was established with the support of the Swiss Development Cooperation (SDC), which funded the RisiAlbania project, and helps coordinate actors in the sector. It has set up a website, which centralizes the regional tourism market offer for Gjirokastra, Përmet and Tepelena in one location (www.visit-gjirokastra.com). This portal lists the available activities, along with tourism businesses, photos, prices, maps and reservation form. While the association is active, one member indicated that it is unclear how they will remain operational after the

project ends – particularly when paying membership fees becomes more challenging because of the negative impact of COVID-19. One funding source for this association are the commissions from bookings made on the Visit Gjirokastra website, although it is unclear whether this will provide a pathway to the association's long-term operational viability.

The "Pro Përmet" association is the most active body in Përmet. It was established with the support of CESVI, an NGO, which has worked extensively in both agriculture, tourism and community development. The members of the "Pro Përmet" association include tourism businesses, agri-food producers and handicrafts. The main focus of this association is the promotion and development of tourism products and Përmet as a destination, through their online channels (website and social media) and participation in tourism fairs in Albania and abroad (mainly Italy) with the support of CESVI.

Further to that, CESVI has supported the development of the Slow Food Movement in Përmet and has assisted in training Përmet young people as hoteliers, local guides and restaurant chefs in collaboration with the Vocational Education Training (VET) Centre Gjirokastra or by inviting trainers from Tirana to Përmet.

Beyond that, the World Bank and GIZ are active with programmes. The World Bank has approved US\$ 71 million for a project on Urban Integrated Management and Tourism in Albania, focused on four districts: Saranda, Gjirokastra, Përmet and Berat, with the scope to develop tourism as a way to boost economic growth, tackle poverty and raise living standards in these districts.

Lastly, the Albanian Development Fund (ADF) has scheduled renovation works on the Benja thermal waters in the upcoming months. If the renovation is effective and investors found, the baths would be set for development into a thermal resort similar to those in neighbouring Greece (Horwarth HTL 2018).

Tourist demand

Tourist demand breaks down into three key segments: tour-based, foreign "free independent travellers" and domestic tourists. These are divided into different segments, as each segment plans trips, chooses restaurants and hotels, and engages in activities differently. They are thus marketed differently and have different expectations as regards quality of service (Hartrich and Martinez 2020).

Prior to Covid-19, tourism in Përmet had grown rapidly, more than doubling between 2017 and 2019.¹² However, the number of tourists in Përmet is just one-eighth of the around 100,000 tourists a year that visit neighbouring Gjirokastra town.

¹¹ Integrated Rural Development Programme - 100 Village Programme, available here: <https://bujqesia.gov.al/programi-i-integruar-per-zhvillimin-rural-programi-i-100-fshatrave-2/> (accessed 18/11/2020).

¹² Data provided in the interview with the Përmet tourism office.



Tour-based tourists

Estimates by one interviewee indicate that the majority – around 70 per cent – of foreign travellers that travel through Përmet do so on organized tours. These tourists book local travel agencies or tour operators which offer pre-arranged regional tours and organize the itinerary, places to visit, activities and preferred accommodation providers. Përmet is usually part of the Southern Albania tour, also referred to as the “grand tour”. This tour is organized from late March to early June and from September to November.

Tourists spend on average 1.6 nights in Përmet and 1.5 nights in Gjirokastra town (Horwarth HTL 2018: 28 and 32). Tourists in Gjirokastra are usually organized and planned by tour operators, sometimes coming as day visitors from Saranda (or even Corfu) beach holidays. While in Përmet, tourists who come (besides the ones that do the grand tour from Gjirokastra to Korca and stay only for lunch in Përmet) stay longer, as they are interested in nature-based activities, which cannot be done in a few hours.

The tour-based tourists are the highest-value market segment. About 70–80 per cent are between 20 and 55 years of age, coming mainly from Germany, Austria, France, the United Kingdom and Scandinavia, and to a lesser extent the United States, Australia, Canada and New Zealand. One interviewee who owns a hotel in Përmet that mostly serves guests from tour operators says that 60 per cent of its guests are German tourists, 30 per cent French and the rest English, Italian, and other, mostly European nationalities. According to several interviewees, the younger tour-based tourists enjoy activities such as hiking, trekking, rafting or biking.

They visit the Benja baths or the canyon of Langarica, or do the Zagoria trail that connects Gjirokastra with Përmet through a mountain pass. The other 20 per cent of tour-based tourists remain mainly in Përmet town, sampling the cuisine and visiting some religious monuments close by, such as Leusa church.

Free independent travellers

Around 30 per cent of the international travellers who pass through Përmet fall into the category of “free independent traveller” (FIT). Free independent travellers arrive at a destination and book activities and make decisions on their own and at their own pace. During the summer, especially July and August, the main tourists are young individuals, self-organized, interested in outdoor activities, and some domestic tourists at the weekends. Among foreign “FITs”, Germans, Czech, Polish, French and Italians comprise the largest share.

Domestic market

The domestic tourist market has grown particularly as a result of the COVID-19 pandemic, which has curtailed international travel and pushed Albanians to explore their own country. While Gjirokastra town has been visited by domestic tourists for years, Albanians have started to explore more distant places, such as Përmet, more thoroughly and for longer time periods, in search of nature, relaxation and good food. They do so independently, using their own cars or public transport and do not use tour operators to plan activities or accommodation.

While the activity portfolio largely remained the same during 2020, local businesses lowered their prices to match domestic market buying power.



Key sectoral challenges

Seasonality

For many tourist destinations, seasonality is a key constraint for workers. In the Gjirokastra region, the season starts at the end of March and continues until mid-November – with May to the end of September being high season. This means that the season is very active for five months of the year, mildly active for another 2–3 months, and not so active for the remaining 4–5 months. Thus, the sector depends on flexible and seasonal staff, who work irregular hours, often in informal employment and with limited access to stable contracts or social security (Hartrich and Martinez 2020).

Sustainability

Përmet has two hot spots with regard to tourism sustainability. One is the conflict between construction lobbying and eco-groups over the dams built and planned to be built on the Vjosa River. The other is the increasing amount of tourists visiting Benja thermal baths, which could lead to pollution and degradation of the baths, if not managed correctly.

The development of hydro-electric dams on the Vjosa River is the subject of a long ongoing conflict in the region. Three dams have already been built on the Vjosa tributaries, but the main fight is to stop a big dam, the Kalivaç dam, on the Vjosa River, which could impact both the regional tourism offer and its natural ecosystem. During a media appearance, the Prime Minister indicated that the Kalivaç dam will not be built, but there is need for a law or regulation to ensure this and legally protect the river and its ecosystem. Despite the promises, it is important to note that the Vjosa River is an important resource for potential hydropower, which

is “clean energy”. This puts pressure on the Government to exploit the river for this purpose, as there are few alternatives in the country.

“Benja will be destroyed if it is not managed.”

► Tourism stakeholder

The other topic of concern with regard to the environmental sustainability of tourism, Benja thermal baths, is subject to a different kind of threat. A curative spot set in a beautiful natural area, it recently became quite popular with domestic tourists – particularly from Tirana – through social media photos and videos. As a result of its raised profile, a new wave of tourists is coming to the baths, sometimes parking cars in the natural environment, taking photos while spending little time in the thermal waters or contributing to the local economy by consuming food in the region. This has had several effects that degrade the value of the site for the traditional, higher value market segment:

1. it is now more common to see litter and rubbish not disposed of properly;
2. the baths are now overcrowded;
3. the profile and intentions of these tourists do not match the resources that this area offers.

While management of the site has been a challenge, the ADF is funding a site management plan to help support more sustainable development of the resource.

Role of the target group

The objective of the project is to improve the economic situation in the tourism market, leading to more employment opportunities and increased incomes for female workers and young people. There is a particular focus on female business owners.

Women remain underrepresented in the Albanian labour market, with a gender gap of 14 percentage points. Also, 29 per cent of employees are registered as contributing family workers (nearly twice as many as men). The proportion of women doing unpaid work each day is 22 per cent (World Economic Forum 2020: 63), meaning that they do almost a quarter of their work for free. In the Gjirokastra region, only 27 per cent of active enterprises are owned or managed by women.

“When we open calls for tour guides there is no interest from women.”

► Tour operator

Women are highly visible in the service sector, working almost exclusively in restaurants, hotels and guesthouses. They are less active as tour guides. In restaurants and guesthouses, women are often responsible for cooking, sourcing goods and managing the day-to-day operational tasks. One source indicated that women often work in tourism as a means of securing a secondary source of income, while their husbands work in more steady types of employment.

Within the subsector of agri-tourism, one interviewee indicated that small businesses around the production of local products, such as gliko and honey, are owned and operated by women. This encourages female labour market participation. It is estimated that within agri-tourism about one in four enterprises in the Gjirokastra region are owned or managed by women (Albanian Institute of Statistics 2018: 108).

Young people are more active in working as tourist guides and using their language skills in hotel, restaurant and bar work, among other things. Their involvement adds a lot to the tourist sector: interviewees

identified as key assets, besides their ability to learn and speak new languages, their utilization of digital marketing skills. While tourism is one of the most attractive employment sectors for young people in the region, various interviewees also mentioned about the trend for young people to migrate to Tirana or abroad in search of more urban lifestyles and better paid jobs. Regarding youth employment, Gjirokastra region has the highest incidence of young people neither in employment, education or training (NEET), at 44 per cent (23 per cent of whom are unemployed and 77 per cent are inactive) (Albanian Institute of Statistics ND).

The pandemic has cut the number of jobs and degraded the conditions to those still working. Many hotels, restaurants and tour companies have laid off or furloughed staff to reduce their operational costs and remain viable. As a consequence of the decrease in prices for touristic products (by at least 20 per cent) to meet domestic market price points, businesses have cut their margins, which is likely to result in lower take-home pay for workers (Veizaj 2020).

The seasonality of tourism also has direct and profound impacts on employment stability. Local tour operators and guesthouses cannot afford to retain full-time staff throughout the year and they engage their workers as “independent contractors”, only during the active tourism season.





▶ 03



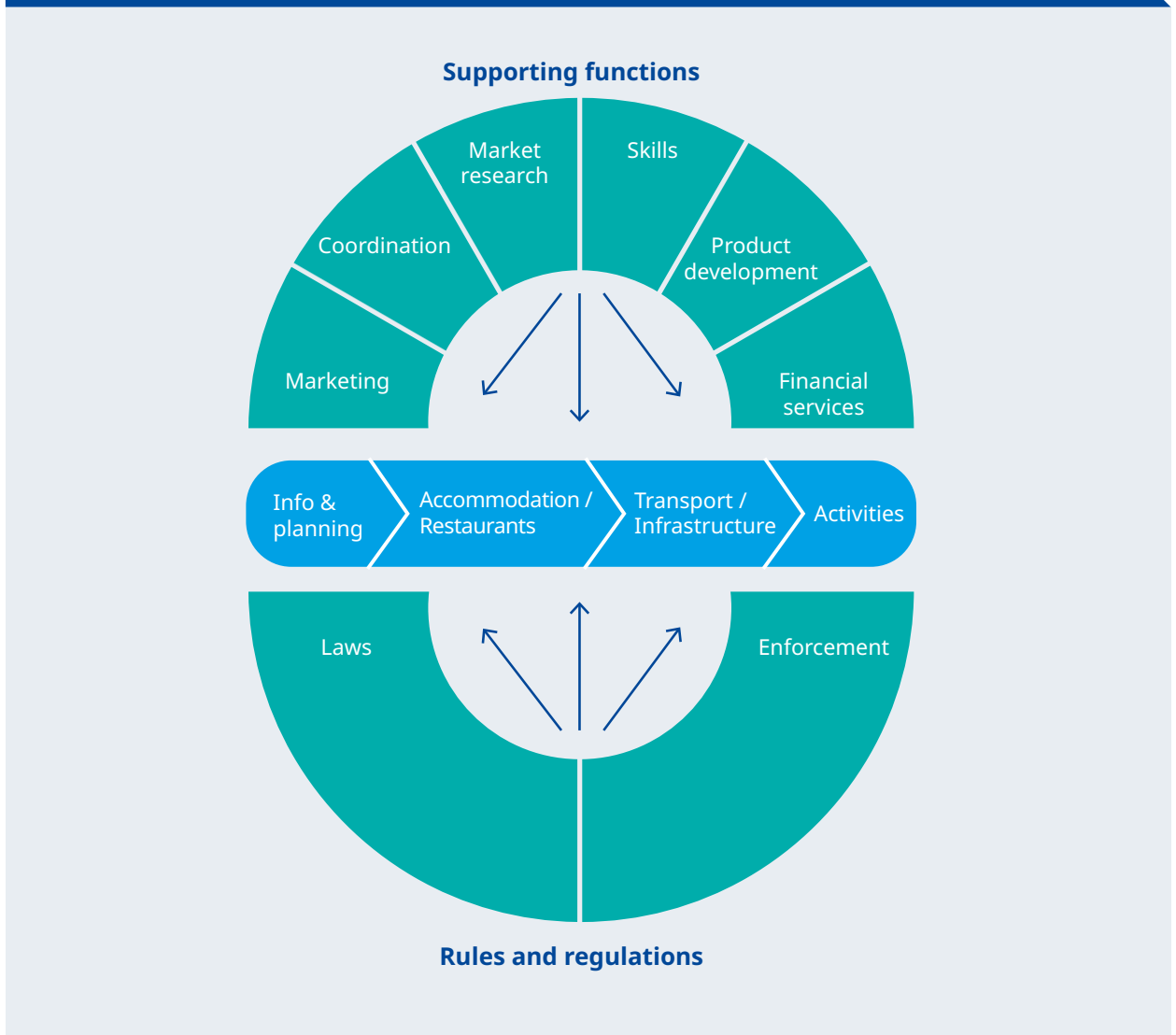
▶ The tourism market system

The market system is a picture of how a market operates. The market system includes supply/ demand transactions and between businesses in the core value chain, as well as the “supporting functions” and “rules and regulations” that shape the way businesses and employees operate in this core value chain. A market systems analysis has a broader scope than a typical value chain analysis because different actors and their commercial success, or the well-being of the target group, are influenced – directly and indirectly – by what happens in their surroundings. For example, financial services, which are a supporting function, do not directly operate within the sustainable

tourism value chain, but they strongly influence how tourism businesses set up, grow and operate, and how tourists access and pay for every transaction during their experience.

Figure 5 shows an illustrative market system for the sustainable tourism sector for the Gjirokastra region in Albania. It includes a simplified value chain surrounded by the supporting functions above and rules and regulations that constrain the value chain. In the rest of this section we provide additional details on each area identified in the figure.

Figure 5: Upper Vjosa River Basin sustainable tourism market system



Core market

The core value chain in a tourism market system is somewhat different from a traditional commodity-based value chain. In a traditional value chain, the focus is the process of value addition to the commodity, from producer to processor to client. In a tourism value chain, the tourist, and the supply/demand transactions throughout the tourism experience, are the focus of the analysis. The following sub-sections briefly discuss each of the principal services in the tourist experience.

Information and planning

For each key tourist demand segment, the information tourists receive and the planning they do are quite different. An overview of planning and information is provided for each segment.

Tour-based tourists

The largest and highest value demand segment, foreign tour-based tourists, largely carry out their planning and decision-making for the holiday in their home country. Such tourists book either through international travel agencies or directly with local tour operators – obtaining information from the former directly with the agent, or the latter through operators' websites.

For this segment, the tour operators do most of the planning. They have a preferred list of activities and hotel providers that have been selected based on operator visits and supported through client feedback. Some tour operators indicated a degree of variability in how they plan activities. For example, some older clients (roughly 20 per cent) may not be capable of participating in action-adventure activities, and so they plan a less physically demanding itinerary. In other cases, tourists prefer to rent a car and drive themselves; the operator organizes almost everything except the transport. This leaves the tourist with little choice to decide on the length of the stay and thereby also makes it difficult for local players in the tourism sector to keep the tourists in the region longer than has been planned from the beginning.

Within the framework of traditional tours, these tourists spend one night in Gjirokastra making cultural visits to the old bazaar, the castle, and some traditional houses, and one or two nights in Përmet for hiking, trekking, rafting or biking or the thermal baths.

The COVID-19 pandemic has shown the potential fragility of focusing on foreign tourists exclusively, when international travel is possible only to a limited extent.

Free independent travellers

Free independent travellers (FIT) plan their trips based on information shared by international travel websites, such as TripAdvisor, Lonely Planet, Bradt Guides and Petit Futé, among others. For this demand segment, the [VisitGjirokastra](#) and [VisitPermet](#) websites – both coming online within the past couple of years – provide general information on activities and experiences, hotels, guesthouses, restaurants and events, many of which can easily be booked online. The VisitGjirokastra portal, which is in Albanian and English, promotes Gjirokastra, Përmet and Tepelena and their villages. The VisitPermet website, however, is available in Albanian, as the backing association, Pro Përmet, has not sourced funds and capacity to translate it and keep it up-to-date. Thus, the website does not directly provide information related to this segment.

Most accommodation facilities are registered with and can be booked through traditional online platforms. Activities can be booked through TripAdvisor, social media or through the hotels and guesthouses themselves.

Both Përmet and Gjirokastra have tourist information centres staffed with English-speakers. The centres have information brochures, maps and business cards of tourist businesses available in English, and provide a brief flavour of the activities in the region. However, neither of the tourism offices in the two towns have a webpage, which makes it difficult for foreign tourists to do necessary research in advance of coming to Përmet and Gjirokastra. Përmet, for example, is a small municipality with limited funds for such activities as setting up a sophisticated online presence.

Domestic market

Domestic tourists receive information about both Gjirokastra and Përmet mainly through social media, but also through traditional media, such as local TV and newspapers. They typically come for the weekend, arrive on their own, book mainly through phone or social media messaging apps, and the principal activity is the thermal baths.

In summary, the underlying causes of poor information and planning include:

- ▶ lack of support for promotion agents in the country;
- ▶ lack of a consolidated touristic offer and authentic products of the region.

Accommodation and restaurants

Accommodation

Gjirokastra offers a range of accommodation, from hotels to camping sites, with 82 accommodation facilities, including 40 hotels, four hostels and 36 guesthouses. The three largest hotels have 60 to 80 rooms.

According to the Tourism Office, Përmet offers 12 hotels and 16 guesthouses, all of which are at least registered on Booking.com. Hotels are generally small, the biggest has 33 rooms. The estimated average hotel occupancy rate is 50 per cent, and 70 per cent during the high season. There are only a few weekends in peak season when they reach capacity.

The largest hotels indicated that they have links with tour operators and host approximately 3,000–4,000 tourists a year. Around 60–70 per cent of their total occupancy is filled by tour operators, while 30–40 per cent is booked through online platforms, such as Booking.com, Expedia and social media.

The hotel sector is among the hardest hit by the COVID-19 pandemic, but in Përmet the decrease in occupancy rates has been less severe, at 20–30 per cent, mainly because of the quarantine rules in spring 2020: a lot more domestic tourists have visited Përmet in 2020, making up for the lack of international tourists able to visit Albania. Despite this, hoteliers mentioned that they needed state support to retain their permanent employers on wages and to survive the crisis.

Rural guesthouses are often owned and operated by local members of the community and serve as a jumping-off point for hiking and agro-tourism. Women were cited as among the principal operators of these businesses, too. As an example of that, a women entrepreneur opened a guesthouse 35 kilometres from Përmet two years ago and said that the business had grown faster than expected. During 2019, they hosted 15 people per day, operating at almost full capacity from May until October.

Despite the growing demand, several key constraints limit the growth and development of guesthouses. The principal constraint is the capital needed to renovate rural houses to a standard for international guests, including suitable guestrooms and inside bathrooms. One interviewee indicated that this may require about €3,500, which many Albanians don't have. Beyond that, annual taxes and licensing fees amount to an additional €1,000 per year. For most, these costs can be an initial barrier that is too high to overcome.

“We don't want to add more rooms to the existing building, but continue cooperating with host families and create an accommodation chain in the village, so that the tourist feels at home, experiences the rural lifestyle and goes back with a memory.”

► Guesthouse owner

Another constraint is the formalization of guesthouses. Interviewed tour operators indicated that they needed to invoice guesthouses to ensure that their business formally follows all legal procedures. However, not all guesthouses are legally registered as such, which makes them less attractive to be included in the tour operators' itinerary as accommodation. This puts an additional constraint on the development of rural tourism in the region, where hotels are scarce and visitors are dependent on guesthouses.

As with much of the tourism sector, proper skills are a real constraint – it's difficult to find skilled staff, or get them to work and/or live in such rural communities and also a challenge for the guesthouse operators to pay for the skills. Wages in other parts of the country are higher, which makes it difficult for local business owners to make young people stay in the region or to attract people to move to Southern Albania.

Another key constraint is the transportation infrastructure, as the roads that lead to the villages are often mountainous, winding and often in poor condition.

Restaurants

Përmet and Gjirokastra are well known for their culinary tradition, and this has been marked by the development of the Slow Food Movement, which now has around 80 members in the country. The Slow Food Movement intends to protect traditional products, recipes and so on and provides a link to local agriculture. According to a well-known chef in Përmet “we take a great interest in farmers who offer organic products”.



Përmet has just three principal restaurants, which during high season, all operate at capacity. One restaurateur indicated that approximately 70 per cent of their clients are foreign tourists, half of whom arrive through travel agencies, while others come due to positive reviews or recommendations. In the smaller town of Kelcyre, close to Përmet, the market is 80 per cent Albanian and 20 per cent international.

“We want to open as many restaurants as possible because we don’t have the capacity to handle the influx of tourists during the (high) season.”

► Restaurant owner

While gastronomy within the upper Vjosa River basin area is well known by Albanians and has a clear branding under the Slow Food Alliance, it is unclear how well it is marketed as a draw to foreigners to the area for culinary tourism.

Within restaurants, one key challenge is the lack of skilled staff and high staff turnover. Wages for cooks rise each year, but they still can’t compete with wages in Tirana or those in neighbouring countries.

In summary, the underlying causes of poor information and planning include:

- limited access to capital to start or enhance businesses;
- lack of skilled staff;
- limited marketing of the region as a culinary destination to international tourists.

Transport and infrastructure

Gjirokastra is well connected regarding transport infrastructure, as it is on the main axis between Tirana and Saranda and the Kakavije border point, one of the main border points with Greece. It is 3.5 hours from Tirana, and just one hour from Saranda (although with new road construction this will be cut to 30 minutes). There are many bus connections to Tirana (six times a day), Saranda and Greece, and also to Përmet, less so to Korca (Visit Gjirokastra ND a).

Transport infrastructure makes Përmet somewhat difficult to get to as it is not on a main road. Poor road infrastructure also makes it difficult to promote activities such as visiting the surrounding villages, rural churches, the “House of the Frashëri brothers”, or the Fir of Hotova National Park, or any of the other sites that have the potential to be tourist attractions.

While this can be perceived as a constraint, in some ways it serves as an advantage. For example, Përmet is located on the road between Gjirokastra and Korca, which is a six-hour drive.¹³ However, because the condition of that road is quite poor and it is difficult for operators to take tourists on such a long trip, they are forced to stop at an intermediate point (Përmet) for lunch and sometimes overnight. On the other hand, the poor accessibility to some extent serves to protect its natural value and gives it the feel of being “off the beaten path”, playing to its unique selling proposition.

Tourists usually visit Përmet by private car or buses organized by the tour operators and very rarely via public transport. Despite that, Përmet is well connected to Tirana (five buses a day and a 3.5 hour trip), three times a day with Gjirokastra (one hour drive), and twice a week with Korca (135 km or 3.5 hours).

There is only one international airport in Albania, Tirana International Airport (TIA), which is 240 km or a three-hour drive from both Përmet and Gjirokastra.

Concerning more minor, yet still important infrastructure, several interviewees indicated that hiking trails needed further development, maintenance and signage.

In summary, the underlying constraints on transport and infrastructure include:

- ▶ lack of financing for infrastructure between villages.

Activities

The Gjirokastra region offers a variety of tourism activities, such as rafting, trekking, horse riding, jeep or buggy tours, and camping experiences.

Përmet offers two principal activities: rafting for the international, outdoor-adventure tourists and the thermal baths for the domestic market. Concerning rafting, the season is longer than other European rafting opportunities, starting from early March and lasting until November. However, rafting remains an adrenaline activity for younger, international tourists. And while this links to Përmet's wider action adventure offer of trekking, jeep tours, mountain biking, camping and horseback riding, it has little connection to the domestic tourist market interests (thermal baths and gastronomy), or those of the large catchment of cultural tourists visiting Gjirokastra.

Activities in Përmet have traditionally been developed and offered only by a handful of local tour operators, of which one principal contributor specializes in rafting the Vjosa River, but also offers other activities, principally trekking. However, the activity portfolio has been increasing in the past few years, for instance, with

a hotel/guesthouse developing and offering other adventure tours, such as horseback riding. Tours organized through the local operators and guesthouses are arranged by either national or foreign tour operators, local hotels or even by tourists, who find them directly on social media or travel websites, such as TripAdvisor.

The Benja Thermal Baths offer six natural pools that are said to deliver health benefits. As it is the main domestic attraction around Përmet, and is contained in a small, natural space, it can get overcrowded and polluted during peak months in summer and needs to be better managed (see Sustainability sub-section in Section 2.3). While the destination adds to the value of Përmet's offer as a whole, the activity itself has limited added value. As one foreign visitor indicated “I would recommend to go and see and if you can get there a few days in a row for an hour so you can benefit the natural water healing. Otherwise it's just one of those things you go to once. Unfortunately there is no restaurant or food. Only a coffee shop and local people selling jams and tea for tourists” (TripAdvisor ND).

In summary, the constraints include:

- ▶ activity offers beyond rafting are only in their early stages in Përmet;
- ▶ underdeveloped infrastructure around some of the tourist attractions in the region (for example, thermal waters).



13 One interviewee indicated that work to improve this road would commence this year.

Supporting functions

Marketing

Tour operators indicated that internationally, Albania is still a rather unknown destination, particularly compared with its immediate neighbours Greece and Croatia. While a number of factors play into Albania's relative obscurity in this regard, one key constraint is marketing.

The National Tourism Agency, housed in the Ministry of Tourism and the Environment, is the organization responsible for Albania's tourism marketing. Although it has an annual marketing budget of around €1–2 million (Ministry of Tourism and the Environment 2018: 10), spent mainly on participation in tourism fairs, that amount seems paltry relative to a sector that has generated close to €3 billion in GDP per year and nearly half of Albania's exports, creating one in four new jobs in the past five years (WTTC 2019).

Some Albanian tour operators participate in international tourism fairs to support the marketing of their packages to international travel and tour companies. Local operators also participate in national tourism fairs to market and sell their offer to various national operators within Albania.

Within the study region, neither Përmet nor Gjirokastra have a tourism marketing strategy. The largest destination marketing outreach is from the Visit Gjirokastra association, which is active on social media (more than 15,000 Facebook followers), has a strong online presence through the portal and has participated in a few smaller tourism fairs so far. The Përmet tourism office has a budget of €16,000 annually (Horwarth HTL 2018: 9). Apart from that, there are few resources that fund collective, destination-focused marketing.

Përmet's "brand" is unclear and thus cohesive marketing behind a common destination theme or a concentration of themes is non-existent. At the moment, it is branded in terms of "Apart from the sea, we have everything" and "the Town of Roses". This limits the concentrated destination marketing or recognition and then product development around that theme.

While a case can be made to use marketing as a means to generate demand, and in turn, bring money directly to relatively poor communities and create jobs, some stakeholders indicated that marketing needs to be done with some caution. If marketing is not done in a way that brings incremental growth relative to the destination's carrying capacity, the destination can quickly become overcrowded or "over-touristed", which can damage

the one of the regions principal assets, its natural environment.

A summary of the causes of marketing constraints:

- ▶ lack of a tourism marketing strategy at the local level;
- ▶ limited public budget both at the national and municipal levels;
- ▶ limited marketing expertise and funds among tourism businesses;
- ▶ lack of a Përmet "brand";
- ▶ limited social and digital media market skills on the part of business owners who are older and find it more difficult to use Facebook, TripAdvisor and so on.

Coordination

Albania has four national tourism associations¹⁴. In most of these associations, membership fees are scarcely paid, they have few to no elections for the executive board or the chairpersons, and it is difficult to know how many real members they have. Perhaps most importantly, their leverage and perceived value to potential members are low.

At regional level, Visit Gjirokastra, a destination management organization, commenced in 2018 through funding from RisiAlbania. The association covers the region, including Përmet and Tepelena, and focuses on promoting and improving tourism by:

- ▶ bringing together tourism businesses;
- ▶ serving as a platform to discuss members' interests and challenges;
- ▶ marketing and lobbying for the collective interests of the destination.

In a very short period, the Visit Gjirokastra portal has become the main hub for marketing activities and information in the Gjirokastra region. The association serves as a mechanism to lobby on behalf of their members' interests and concerns, at local or national level. It has played an important role during the COVID-19 crisis.

Pro Përmet is an association/consortium of 31 businesses, two municipalities (Përmet and Kelcyre) and two NGOs. Each member pays a membership fee of 10,000 Lek (€80). The organization was established in 2012 and works to promote typical agriculture and handicraft products, as well as the development of accommodation, such as hotels, restaurants and

¹⁴ These include: Albanian Tour Operators Association (ATOA), Albanian Tourism Association (ATA), Albanian Tourism Union (ATU), National Association of Tourist Guides in Albania (NATGA) and recently the new Albanian Tour Guide Association (ATGA).

environmental preservation. One key stakeholder indicated that the vision for Pro Përmet is to become a Local Action Group (LAG), so that it can qualify and apply for EU funds.

Despite the positive coordination efforts in Gjirokastra region and Përmet, interviewees indicated that both associations are still fairly dependent on donor funding. This means that their ability to continue or become more effective going forward depends on external funders. Also, given the stress that COVID-19 has imposed on businesses, the pressure to allocate funding to keep their businesses alive rather than continue paying membership contributions is high. Furthermore, a high rate of informality in the Albanian tourism industry as a whole, as well as poor performance of previous associations due to lack of experience, not to mention scepticism towards joining forces together and centralization (in reaction to the previous centralized communist system) have presented barriers to convincing the best and most important stakeholders to join and become active in these associations.

The key constraints to coordination are listed as follows:

- ▶ not all the main businesses are member of these associations (lack of trust, communication, democracy), which thus deprives them important contributions and experience;
- ▶ relations with the local municipalities are still vague and insubstantial.

Market research

Market research can do much to help the development, orientation and marketing of new products. In Albania, however, this is largely absent and stakeholders indicated that this is one of the biggest constraints on the sector.

There is a basic data collection system at border points to track visitors at a national level. This feeds into the MTE and INSTAT collection systems. At the border points, tourists are asked the purpose of their visit ("tourism" or "other") and nationality. While this provides an indication of larger trends, it is not necessarily helpful for businesses at the local level, who might benefit from data about durations of stay, money spent, or market demand, split into various market segments.

The Gjirokastra tourist office does collect some local data, counting the number of tickets sold at museums and surveying tourists arriving on buses, but nothing substantial is done with this data and it is not made publicly available. The same goes for the tourist office of Përmet.

Beyond that, local stakeholders had limited data to share during the interviews, which leads to the conclusion that their understanding of the market is still very limited.

A summary of the main causes of the market research constraint include:

- ▶ lack of a national system to gather tourist data in accommodation units and other tourism businesses;
- ▶ difficulty finding professional capacity and expertise at local level to do market research;
- ▶ lack of coordination between national level (MTM and INSTAT) and local institutions regarding data gathering and analysis.



Skills

Poor skills, such as low levels of foreign language knowledge or digital marketing, was repeatedly identified as a key constraint on the sector. Many businesses indicated that they trained their staff in-house, but this incurs a resource cost on their working and management time. Furthermore, poorly skilled staff do not perform well under pressure in peak periods; as a result, clients may complain about poor service and high prices for what they get.

Impacting skills quite heavily is regional rural migration: young people are moving from rural to urban areas or even abroad, where wages are higher and the social and cultural offers are more in line with their interests¹⁵. This is a force that is difficult to stop. And while tourism jobs can be more lucrative than many other employment opportunities within the region, it generally only offers work for half the year. Migration is thus driver of high staff turnover, which means that small businesses are constantly having to invest in training new staff, a real cost to the business.

The training offer was cited as being quite limited. While CESVI has organized a one-off training course for hospitality workers in Gjirokastra, this fills only a small skill supply gap and does not address the larger need for better, long-term skills training in the market. In the region, there is only one VET Centre, which is based in Gjirokastra town. According to their own statistics, the VET Centre has trained 397 people over the past five years in seven training courses relevant to the tourism sector. Some 308 students have graduated in foreign languages, with English the dominant language (77 per cent). Three tourism qualifications were introduced in 2019. Since 2015, 37 mountaineering guides have graduated from here; the gender ratio was relatively even. Interestingly, almost four times as many women as men trained to become chefs and almost twice as many women obtained a qualification to become tourist guides. Statistically, only 5 per cent of the women and 10 per cent of the men who attend training at the VET Centre in Gjirokastra find employment within one year of graduation¹⁶. While this statistic should be approached with caution, because there could be several reasons for it, it is an indication that there is a mismatch between market demand and supply when it comes to skills development (Gjirokastra Vet Centre 2020).

To get a general guide's license in Albania, there are three authorized national education institutions that can provide training. It is difficult to obtain more specialized licenses, however, such as a rafting guide license,

because there are few providers. For this reason, some obtain their licenses abroad (for example, in Greece).

The main constraints on skills include:

- ▶ high staff turnover driven by youth migration due to a series of factors, including low wages, poor infrastructure and lack of social life in small towns;
- ▶ skills training does not meet market demand.

Product development

Përmet's first tourism products were developed by national rafting tour operators. They created the itineraries and some handed them over to local tour operators, such as Vjosa Explorer. Since this initial product development phase, Vjosa Explorer has expanded its product portfolio and now offers hiking, climbing and jeep tours, which can last between two and four days.

National tour operators specialized in outdoor tourism have developed, largely from scratch, some trekking trails in the region, especially in Zagoria, which connects Përmet with Gjirokastra. There is more development potential in this regard, for example, new trekking paths, connecting Përmet with neighbouring Skrapar, or Kurvelesh, which is linked to coastal mountains.

Përmet is part of the EX.TOUR project (funded by an IPA Greece-Albanian project), which will construct three climbing fields – one in Përmet and two in Konitsa – that would further develop the extreme sports offer. EX.TOUR will also build a mobile app which will promote this initiative in three languages: Albanian, English and Greek.

Outdoor tourism is limited in numbers, group age and total money and time spent in the region, however, and little has been done to broaden the product offer to connect to a higher value, cultural tourism¹⁷ more common in Gjirokastra.

The main constraints on product development include:

- ▶ focus on niche outdoor tourism products;
- ▶ lack of confidence in tourism/agricultural potential of young people who do not see a future in villages;
- ▶ lack of training for people in the region.

Financial services

Due to the centralized economy and high informality rates, it is difficult for small, local businesses to

¹⁵ As identified by various interviews.

¹⁶ These are statistics for all programmes offered at the VET Centre, not only the degrees in tourism.

¹⁷ Opportunities that the region could built upon are further explained in Section 4 of this report.

access finance. These businesses typically do not use traditional financial services because they demand high interest rates and have complicated paper work to complete. They are generally accessible only to formal, registered businesses. Furthermore, banks need collateral to guarantee financing, which is off-putting to many business owners who do not want to risk losing their houses if they cannot pay back the loans.

CESVI has helped quite a lot of small businesses, but only for a certain period. The "100 villages" project is also helping private initiatives in these villages, four of which are included in the study area. The IPARD¹⁸ project is supporting agro-tourism with funds; women get 50 per cent more opportunities to have their applications accepted¹⁹. These are just temporary actors, however, and cannot be viewed as a long-term replacement for financial service providers.

According to one local business owner, access to the Agency for Agricultural and Rural Development is difficult; very few have won grants in Përmet because there is bureaucracy and small businesses do not know how to apply.

Constraints on financial services include:

- ▶ high levels of informality limits businesses' ability to access formal credit;
- ▶ bureaucratic and complicated procedures to apply for credit;
- ▶ asset collateral guarantees provide a risk barrier.

Rules and regulations

Laws

The Ministry of Tourism and the Environment (MTE) is the national regulatory authority for the tourism sector and is the custodian of the tourism law, which was approved in 2015²⁰. According to the tourism associations, however, this law does not fully address many issues that persist in the sector.

Within tourism business branches, accommodation and travel companies need a more complete set of regulations. For example, Albania does not have a hotel classification and it is not clear which is the responsible body. Furthermore, the law on insurance for tour operators and travel agencies is not clear: insolvency insurance is obligatory, but no amount limit has been specified, so it is difficult to understand how much insurance is required for compliance.

For outdoor activities that involve high risks insurance is particularly necessary. One local activity provider indicated that they have prepared a standard form, through which the risk is taken by the client. It is very difficult to insure third parties, as insurance companies do not offer this service to them (probably due to the high risk).

The biggest barrier to starting up a micro business are the taxes and the costs of formalizing employees. Operating a registered business costs around €100 a year, and each business needs to have at least one registered employee. This means social and health insurance payments of around 7000 Lek (€57) a month or around €700 a year. This can be a considerable barrier to start-ups in villages as making an additional €800 beyond initial fixed costs and other standard operating costs can be too much in the first few years of operation.

Given the costs, many small businesses choose to start up informally, which is an issue for formal tour operators. Formal tour operators need invoices for the services of local businesses in order to make the payment. When these local businesses are not registered and therefore cannot provide invoices this expense essentially eats into their profit as it must be paid in cash.

In response to the pandemic, it has been reported that the principal stakeholders in the tourism sector are working together to enhance the regulations and standards for "new tourism".

A summary of the key legislative constraints:

- ▶ incomplete and unclear coverage of the tourism law;
- ▶ high perceived operating costs for formal micro businesses.

Enforcement

The national level tourism inspectorate is responsible for enforcement and application of the tourism law. This is important for controlling the quality of the offer and consumer safety. One of the key challenges is to ensure the safety of tourism services if they are provided by informal and unlicensed tourism businesses. The inspectorate has limited staff, capacity and resources, however, and thus is largely ineffective.

A summary of the key constraints:

- ▶ lack of resources on the part of the tourism inspectorate.

¹⁸ IPARD II www.ipard.gov.al (accessed 18/10/2020).

¹⁹ According to the interview with a representative from the Ministry of Tourism and the Environment.

²⁰ Albanian tourism law, MTE http://turizmi.gov.al/wp-content/uploads/2018/02/Ligj_93-2015.pdf (accessed 12/11/2020).

Constraints summary

The constraints identified in Section 3 are summarized in Table 1:

Table 1 Constraints – summary table

Constraints	Underlying causes	Impact on market
Core market		
Information and planning	<ul style="list-style-type: none"> Lack of support for promotion agents in the country Lack of a consolidated touristic offer and authentic products of the region 	Tours organized by tour operators and FITs have limited info on what Përmet has to offer, therefore spend less time and money there
Accommodation and restaurants	<ul style="list-style-type: none"> Limited access to capital to start or enhance businesses Lack of skilled staff Weak marketing of the region as a culinary destination to international tourists 	Few options for tourists to spend time and money in more rural areas
Transport	<ul style="list-style-type: none"> Lack of financing for infrastructure between villages 	Limited accessibility to surrounding villages and therefore few tourists in these areas
Activities	<ul style="list-style-type: none"> Principal stages of development of activity offers beyond rafting in Përmet Underdeveloped infrastructure around some of the tourist attractions in the regions (for example, thermal waters) 	Few activities for tourists other than outdoor tourists (mainly FITs) to spend more time in Përmet and surroundings
Supporting functions		
Marketing	<ul style="list-style-type: none"> Lack of a tourism marketing strategy at the local level Limited public budget both at national and municipal levels Meagre marketing expertise and funds among tourism businesses Lack of Përmet “brand” Low social and digital media market skills from business owners who are older and find it difficult to use Facebook, Trip Advisor and so on. 	Unclear branding of Përmet and not focused enough marketing to the right market segments results in less destination appeal
Coordination	<ul style="list-style-type: none"> Not all the main businesses are member of these associations (lack of trust, communication, democracy), which miss their important contributions and experience Relations with local municipalities are still vague and not substantial 	A lack of coordination makes branding the region, and thereby making it more appealing to visitors, more challenging

Constraints	Underlying causes	Impact on market
Market research	<ul style="list-style-type: none"> Lack of a national system for gathering tourist data in accommodation units and other tourism businesses Difficulty finding professional capacity and expertise at local level to do market research Lack of coordination between national level (MTM and INSTAT) and local institutions regarding data gathering and analysis 	Limited possibilities to develop sustainable, impactful tourism strategies as local actors lack information
Skills	<ul style="list-style-type: none"> High staff turnover is driven by youth migration due to a series of factors, including low wages, poor infrastructure and lack of social life in small towns The skills training provided does not meet market demand 	Few qualified staff in the region to ensure high standards of service and quality
Product development	<ul style="list-style-type: none"> Focus on niche outdoor tourism products Lack of confidence in tourism/agricultural potential of young people who do not see a future in the villages There is a lack of training for people in the region 	Perceived limited activity offers causes tourists to stay for shorter times
Financial services	<ul style="list-style-type: none"> High level of informality limits businesses' ability to access formal credit Bureaucratic and complicated procedures to apply for credit Asset collateral guarantees provide a risk barrier 	Constrained potential for businesses to grow, especially in rural areas
Rules and regulations		
Law	<ul style="list-style-type: none"> Incomplete and unclear coverage of the tourism law High perceived operating costs for micro, formal businesses 	Informality within local tourism services creates unfair competition and lower probability of decent work opportunities
Enforcement	<ul style="list-style-type: none"> Lack of resources from the tourism inspectorate 	Safety of tourism services is not controlled



Opportunities

A market systems approach seeks to identify, address and remove system-level constraints that inhibit the growth of more inclusive markets. Projects using the market systems approach pilot many different interventions, hoping that some gain traction and drive a larger systemic change benefitting many, while expecting that some never make it to a point where they can have a significant impact (although without doing any harm of course). The reason for this is that lots of factors, many of which are often outside programme control, determine the success or failure of a pilot intervention. Such factors could include partner

capacity and motivation, and market forces that affect prices and demand (such as Covid-19).

Key market actors

For sustainability purposes, it is recommended that any future project be implemented with existing market actors taking the lead. To help ensure that the partners have the right incentives and abilities to take initiatives forward, Table 2 summarizes the perceived organizational motivation, and human and financial resource capacity available to drive change in such initiatives.

Table 2 Key stakeholders in the sector

Organization	Relevant information	Motivation / capacity ²¹
Pro Përmet consortium	<ul style="list-style-type: none"> The most active association in Përmet There are 35 members, two municipalities: Përmet and Kelcyra; two NGOs, including CESVI; the rest are businesses They believe the only way to generate income in association and for members is to launch projects, but they don't have the capacity to write projects 	Motivation: high Capacity: medium/low
Municipality of Përmet	<ul style="list-style-type: none"> The main responsible public institution for development in Përmet Quite a few planned and ongoing projects from government and donor funds Need for capacity-building in order to analyse, develop and implement the right vision for (tourism) development in Përmet 	Motivation: medium Capacity: low
Visit Gjirokastra Association (VGA)	<ul style="list-style-type: none"> A new but precarious association supported by RisiAlbania until mid-2021 The concept of a DMO is appealing but there are many challenges, especially getting the trust of the main stakeholders Përmet is a member of VGA and there is an untapped potential to apply for regional projects 	Motivation: medium Capacity: low
CESVI	<ul style="list-style-type: none"> The most active NGO in Përmet Has contributed grants for agribusinesses, training, marketing and creating Pro Përmet. They will remain active in Përmet for another 3–4 years 	Motivation: high Capacity: medium
Ministry of Tourism and the Environment	<ul style="list-style-type: none"> Creates tourism strategies and the guiding legal framework for tourism Provides licenses for tour operators and guides, but accommodation still needs a star classification Does the marketing for Albania as a tourism destination 	Motivation: medium Capacity: low

²¹ Motivation indicates the perceived organisational motivation to drive change in the sector. Capacity is related to human resource capacity to drive change in the sector. Both of these were gauged by the team based on semi-structured interviews carried out during the field research.

Potential areas for intervention

Based on the findings of the constraints analysis and given the assessment of the key market stakeholders, several potential areas for intervention have been identified to make Përmet and its surrounding villages more attractive for touristic activities and thereby increase the number of jobs and boost enterprise growth. These interventions are focused on addressing the underlying causes of the key constraints identified in this report. The suggested interventions also have a sustainability and scalability focus: businesses and organizations can continue, scale up or replicate interventions beyond the life of a potential project in this field.

1. Define the brand and develop a more active marketing strategy

Professional marketing and branding are needed for Përmet and its surrounding villages (underlying cause of marketing constraints). At the moment, Pro Përmet's slogan is "Apart from the sea, we have everything". But having everything is closer to having nothing in marketing and branding terms. The offer should be branded around specific, value added tourism assets, which should be marketed properly, adjusted to different target audiences.

Branding and marketing should target both domestic and international tourists with unique strategies. Marketing activities for the domestic market could be launched in the near-term to ensure more tourism activity in 2021, and international tourist-oriented marketing could start once travel restrictions have been eased.

The branding should consider both Përmet's domestic unique selling proposition (USP) and its opportunities to maximize value from domestic demand. This could focus on nature, relaxation and culinary experiences, which could boost the diversification of demand and strengthen the sector's resilience. For international tourists, more could be done to foster a more cultural offer that could be better linked to Gjirokastra town; or there could be a focus on the accessibility of outdoor activities even during colder seasons (April/May and September/October), which is better than in many other European destinations.

The project could work with Pro Përmet – which includes key public and private sector actors – to develop the brand and identify an actionable marketing strategy that can be implemented collectively and within stakeholder resources. The plan will look to target market segments in both international and domestic markets, and decide the appropriate channels for targeting them. Options include more aggressive social media campaigns for

the domestic market, and links to influential Albanian tour operators and agents that connect to international tourists directly or through international travel agents. The presence at international tourism fairs could also be enhanced, with Përmet as an identifiable brand.

2. Diversify and enhance product development and destination value

Linked with the branding and marketing strategy (intervention 1) is a need to diversify and enhance product development to strengthen the brand, align the offer to the USP, and enrich the value of the destination. A project could be launched to support the development of products in a number of ways:

- ▶ work with national and local tour operators to support new product development, particularly for internationally oriented products;
- ▶ work with local businesses to either amplify existing products or adjust them in line with the new brand.

Product growth should respect the environment and utilize the rich natural and cultural resources the region has to offer.

There are two culturally linked USPs that could boost Përmet's attractiveness in connection with Gjirokastra (which attracts many culture tourists) or its orientation toward the domestic market. By branding Përmet as a cultural destination, the variety and thereby also the number of tourists visiting can be increased significantly. Përmet potential cultural USPs are as follows:

1. **Saze** is a traditional music style that can only be found in Southern Albania, in Përmet and Kolonja. Here, live performances/shows can be prepared for tourist groups at restaurants or hotels. This involves fairly minimal product development, which can add more visibility to the overall cultural offer. The BBC has made an important short film on Saze music²², and among Albanians the Gjirokastra region is known for this traditional music. It is unclear how well international tourists are aware that Përmet is the birthplace of this style, but with appropriate branding the city could build on this.
2. **Culinary.** Përmet has a very strong culinary tradition and the region is well represented in the Slow Food Movement. It is renowned for gliko (a kind of preserve). However, much more can be developed, including cooking classes oriented to foreign tourists, which could be attractive for tour operators that stay overnight in Gjirokastra or Saranda and want to offer more than just a stopover lunch in Përmet. This could be integrated into an existing guesthouse- or community-based

22 BBC <https://www.bbc.co.uk/programmes/p05hgx9q> (accessed 08/10/2020). See also Laver Bariu - Gjeneral Gramafoni (Online video), AngjelPro Albania 1 Official Channel, 15/03/2017. Available at: <https://www.youtube.com/watch?v=A3i3gjBmtng> (Accessed: 08/10/2020).

tourism experience as an easy first step, given that such businesses should be licensed, meet a quality standard and have familiarity with tourist demand. As a response to increasing interest in the culinary traditions of Përmet and the Gjirokastra region as a whole, community-based tourism, or agri-tourism, could be further enhanced and used to encourage locals to become involved in the tourism sector. Initially this might represent only a side income: this has been a successful way of increasing tourism activity and enhancing rural development in other European countries, such as Italy. As the services industry is dominated by women, expanding tourism around culinary experiences and guesthouses would potentially increase the incomes of women in the region.

A project in this area could also explore the potential of working with local producers, who are generally women, to diversify food production offer away from the already commonplace gliko. This will require a rapid market study to evaluate existing supply and demand (by market demand segment) to attempt to discover what other high value, locally produced agro-foods might have market demand. This will help build the culinary brand and offer, while also giving producers space to sell products that could obtain more visibility and better prices because of lower competition.

3. Improve market research capacities and data collection

Overall, and as also underlined in the analysis, little data is available on the number and types of tourists visiting Përmet and the region as a whole, not to mention their interests and spending behaviour. While different stakeholders collect data individually, a common repository of data, such as a tourist registry, would support better and more targeted interventions 1 and 2. Accordingly, a possible project could train the capacities of local stakeholders to collect such data in a meaningful way, make it available among the different actors and publish annual market research that informs the stakeholders about strategies for upcoming years. The Tourism Offices in Përmet and Gjirokastra already collect basic data on tourists for the benefit of local actors.

4. Enhance local associations' orientation toward sustainability and improved coordination

Visit Gjirokastra and Pro Përmet play a key role in coordinating sectoral actors. If they work well, they could enhance the value of the destination as a

whole. Both organizations are in their infancy, having been established and continuously supported by development funding. But they have made considerable advances in a short time. However, one key challenge, particularly with Visit Gjirokastra, is that its operational sustainability seems unlikely without the support of RisiAlbania, particularly given how hard the COVID-19 pandemic has hit businesses in the tourism industry.

In this vein, the project could work with both RisiAlbania and Visit Gjirokastra to assess organizational health and outreach, and research how the association could be put on a pathway toward financial independence. This could look at measures to enhance member contributions both by bringing in some of the main stakeholders in Përmet, Gjirokastra and Tepelena as members, or by devising some form of tiered member contribution systems. It is recognized, however, that trying to do this during the current pandemic could be challenging. The project could look at more targeted support, such as financial capacity development, if needed.

Once organizational strength is improved, the project could work with both Pro Përmet and Visit Gjirokastra to improve coordination between them to develop and promote complimentary products and sell them on a regional basis. In line with interventions 1 and 2, the project could work with both associations to strengthen the links between Gjirokastra town, which would serve as a base/hub, and Përmet as an extension of the offer. Furthermore, Visit Gjirokastra has a more developed tourism concept from which Pro Përmet could learn, as it generates part of their commission. For instance, they make it possible for tourists to sign up for (cultural) experiences and daytrips on their homepage, and also offer skills training for their members.

By working through the two associations, the project could explore strengthening linkages and coordination with the offers in the neighbouring Greek destinations of Konitsa and Ioannina. Here, the project could organize a kick-off meeting between the main stakeholders/tourism associations in the Gjirokastra region and both Ioannina and Konitsa to explore the possibilities of cooperation.

Closer sectoral coordination brings more effective lobbying. While this can be beneficial at the local level to obtain government support on branding or, say, opening flower or food markets on municipal land in Përmet, it can also provide support at national level. Here, the aim would be to use these two associations as coordination bodies to harness the sectoral voice in the region to continue to support the environmental protection of the Vjosa River, which would also protect the destination's value.





Conclusion

A future project would constitute a substantial opportunity to develop the tourism sector in Gjirokastra region in a way that generates jobs for women, reduces poverty for individuals and their families and supports sustainable development. The analysis in this study provides a future project with a starting point to engage with and to drive change in the tourism sector through the potential intervention avenues that have been identified. These interventions aim at enhancing the tourism offer and demand, for the domestic market and foreign tourists.

On the tourism supply side, the project could first try to better define and market the brand based on its USP to its key demand segments: domestic and foreign tour-based tourists. This would be followed by efforts to diversify the product offer to complement the existing offer and move toward a stronger cultural offer that

could attract more domestic tourists and link to the better known Gjirokastra town's offer. The project should also work with the active destination coordination bodies to strengthen their operational viability, outreach and coordination, such that they can actively lobby for better local or national government involvement or support the development links to other destinations in neighbouring Greece.

If the project enjoys success and tourism supply and demand are enhanced, it needs to address challenges that may arise due to increased domestic tourism. Prominent among them are the potential environmental concerns that come with tourism. This would involve looking at initiatives to protect the environmental sustainability of tourism, such that the cultural and natural heritage of the tourism offer are also protected.

Annex A: Research interview list

Semi-structured interviews

1. Government official – national (Ministry of Tourism and Environment)
2. Government official – regional
3. Government official – local
4. Government official – local
5. Government official – local
6. Tourism office – Përmet
7. Tour operator – Tirana
8. Tour operator – Tirana
9. Tour operator – Përmet
10. Tour guide – Zagori
11. Activity-based company – Gjirokastra
12. Activity-based company – Përmet
13. Hotelier – Përmet
14. Hotelier – Përmet
15. Hotelier – Përmet
16. Guesthouse – Përmet
17. Guesthouse with activities – Përmet
18. Restaurant – Përmet
19. Restaurant – Përmet
20. Key informant – Saze music
21. Key informant – tourism representative of Gjirokastra municipality
22. Tourism association – Gjirokastra
23. Tourism association – Përmet

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