

An Integrated Report

Analyze and assess the needs in terms of Knowledge, Skills and Capacities of Tourism Operators in Buna River Velipoje Protected Landscape (BRVPL)

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1. Introduction

The Buna River-Velipoja Protected Landscape includes the Drin Estuary, the Gulf of Drin that runs across the Velipoja city alongside the Adriatic Sea and the river of Buna. The Park is listed as Category V by the International Union of Conservation Nature (IUCN). It is recognized as a wetland of international importance by designation under the Ramsar Convention. The climate, on the other hand, falling under Mediterranean classification, provides great opportunities for sea and sun tourism, with a flat and shallow landscape, alluvial forests, dry grasslands, marsh and shrub lands, freshwater wetlands and beaches.

As a result, tourism is one of the most important activities that has been developed in the area by the population. But the types of tourism activities have been limited especially to Sea and sun tourism, for relatively long time. While lately there has been other tourism activities and also market development not only to Albanian market and Albanians that are living out of Albanian borders, but also the extension of the market to foreigners, especially European tourists, but from other nationalities as well.

The purpose of this integrated report is to make it possible through several established strategies, one of which is the analysis that naturally integrates three main moments (3 sub-studies): after carrying out a detailed study on the main trends of tourism development in general and skills in particular, a second study that looks at and analyzes in detail the current tourism market (demand and supply) analysis, and aims to identify in a third study the needs and the main gaps in these three elements (skills, capacities, knowledge). It should be underlined that the ultimate goal is to identify those problems and gaps that through the measures, actions and action plans undertaken will aim at the realization of *sustainable business practices*, strengthen those skills that really need the labor market, will increase the general and specific knowledge needed, and will guide touristic businesses towards effective management of tourism capacities.

This integrated report is realized through the following three studies:

- 1) *Trends and needs in Tourism in Europe*. The aim of this part of study is underlining through desk research implications and development of tourism during the last decade in Europe, having in focus mainly two goals: tendencies and needs that Europe is challenges nowadays;
- 2) *Existing State of Tourism Activity in BRVPL Area*. The objectives of the study are to analyze and assess the needs in terms of Knowledge, Skills and Capacities of Tourism Operators in Buna River Velipoje Protected Landscape (BRVPL)", to identify trends and needs in tourism sector (mainly in Europe and for the BRVPL) through a desk analysis, and to identify needs, gaps in knowledge, skills and capacities of tourism operators in the BRVPL through a field work);
- 3) *Gap analysis and needs assessment of the knowledge, skills and capacities of tourism operators*: This part of study not only provides the conceptual analysis in identifying and addressing the training needs and skills gaps, while focusing on implementing sustainable tourism activities in BRVPL wetland, but it underlines the importance of undertaking a regular updated data on skills and knowledge demand and supply issues in view to facilitate policy makers and other stakeholders to frame policies and strategies towards development of human capital in the key sectors. Always, the essence of good service is peoples" skills; and the availability of quality workforce is an integral part of successful economic development. Hence, regular undertaking of the current

and forecasting future train needs enables the proper planning in terms of curricula development and review and establishment of suitable skills development policies, facilities and action plans. This eventually feeds into appropriate assessment of economic potential and market opportunities and the identification of underlying constraints and later, addressing employment-related issues.

2. Methodology

The objectives of the study are to identify trends and needs in tourism sector through a desk analysis (mainly in Europe and for the BRVPL), and further, to identify needs, gaps in knowledge, skills and capacities of tourism operators in the BRVPL through a field work.

Target has been main stakeholders of tourism sectors in BRVPL: travel agencies and tour operators, accommodations and hospitality structures: hotel, guest house, public and private NGO and associations; restaurants; tour guides; historians, geography, architects, urban planning, etc.; other service providers as university; media and finally community representatives.

Focus will be knowledge, skills and capabilities of main Tourism Stakeholders.

Methodology of realizing of this study is done through a *bottom up model*, which mean to get up the perceptions and ideas from the community of tourism (main stakeholders). Methodology includes quantitative and qualitative methods as well as:

Quantitative Methods. Regard to quantitative structure, there are delivered 3 types of questionnaires (fourth is qualitative), and for each type are delivered even delivering in BRVPL (in printed copies) even google form.

1. Questionnaire - Evaluation of Tourism Supply;
2. Questionnaire – Evaluation of Tourism Demand from national tourists/visitors;
3. Questionnaire – Evaluation of Tourism Demand from international tourists/visitors;
4. A structured Qualitative Interview with important stakeholders.

Qualitative Methods. The above fourth questionnaire is considered and target to a specific group to have an individual contact and detailed discussion regard to some main and specific topics. Regard to qualitative structure is organized based on:

1. A desk detailed research resource as recent literally and report, documents, recent important events (forums, conferences, etc.) declares from international organization dealing with tourism has been reflected on first deliver report;
2. Qualitative Interview with Important Stakeholders in BRVPL. For this is prepared the fourth questionnaire which intended to gather qualitative information, feedback, vision, perception of important public persons includes in tourism area. Some *interview* with local representative of municipalities where developed, some other representatives of municipalities located in Tirana;
3. Focus group: there are develop 3 focus group after compiling each study. Tour operators, private public NGO that can have direct and significant indirect impact actually, but also can be considered as powerful actors for future development where invited. A parallel analyze based on offer-supply structure and SWOT analyzes is based on existing data and those taken from questionnaires and interviews and/or focused group.
4. Individual meeting with important technical stakeholders and civic society.

3. Trends and needs in tourism in Europe

Some theoretical introduction and familiarization with the main key words concept is presenting and this desk research. There is a new era of making tourism and traveling in different ways/patterns, which causes that Europe, but even the whole world, is moving from sun and beach tourism to alternative forms of tourism based on culture, nature and heritage, lifestyle and ecosystems. The area is focusing on massive tourism (sun and sea) since the potentials exists and has created revenues. This is the reason why we get focused in the first part on *sustainable tourism alternative trend/forms of doing tourism*. Through these concepts, will go towards adapting those forms in BRVPL, which are based on local resources, but also, it is given an orientation that *how massive tourism in those areas can be diverted into more sustainable tourism practices, which combining with evaluation of skills and knowledge will result on a better management of tourism*.

The concept of destination within Europe is shifting from geography and territory concept in a new Europe and sustainable tourism destinations, based on networking and communities. Unplanned tourism management has already caused destinations to face saturation problems. The challenge of reevaluating their developmental goals and patterns is very urgent. Nations, regions, local areas should find ways to confront with this challenge: one way for measuring and ensuring *sustainability patterns* in tourism is through the use of indicators; another one is adapting new models of destinations (above); another one is to use the right packages of knowledge, skills and capabilities that are needed for tourism to be managed in the right way towards sustainability.

a. International trends on sustainable development and tourism

Sustainability is the main challenge objective in Europe. The recent idea that UNWTO has on SDG (sustainable development goals) and using tourism as instrument/policy for achieving sustainable development is analyzed. Sustainability is the keyword of all these decades. It is not a new way of development, or management or thinking ahead, it is a challenge and a philosophy. Education is a strong strategy which leads on that way, agriculture, farming, etc., but it is not used to hear sustainable education or sustainable agriculture and so on, but of course Sustainable Tourism. Tourism is the best long-term strategy to achieve sustainable development.

Why tourism? Sustainable tourism is a recent relatively concept used to reflect the need for a comprehensive analysis and management of tourism both as business and experience. However, this should not be the only consideration. Tourism is actually one part of the effort to achieve overall sustainable development. The United Nations General Assembly has set 2017 as the International Year for Sustainable Tourism for Development (IY4STD), 2018 as European Year for Culture and Heritage, and 2019 as year of education, skills and job creation.



Figure 1: IY4STD (source: UNWTO 2017)

Tourism has a great potential to accelerate progress across the Sustainable Development Goals (SDGs) and is very important for the European economy. Without proper safeguards and investments, expanding the tourism market will increase pressure on biodiversity and the ecosystems on which the livelihoods of so many people and local communities depend (UNWTO 2018 Report: Tourism and the Sustainable Development Goals – Journey to 2030). It accounts for 5 % of direct employment and proportion of European GDP and has a tremendous multiplying effect over other economic sectors, enjoying forecast stable growth for the future. Thus, the discussion about new occupations and future skill needs for the sector in Europe has a particular significance.

b. The social, environmental and economic trends and new era in European tourism. Impact on tourism sector and leisure patterns

Some main global external environment such as the social, economic and environmental, marketing and technology trends and development. Also, secondly, some arguments on how those changes are directly influencing on the operation of tourism businesses, on leisure patterns, on changing concept of “time for traveling” which will low the seasonality and diversify the supply, also change of marketing trends and activities, information technology, etc.

Social and demographic change. One of the main developments and future trends regard to the demographic factors is related to **older age groups**, which especially in Europe will continue to grow in size, so they will continue to be important in numerical terms. Older people will continue to be *healthier* and *benefit* from early retirement schemes and well financed pensions. Also, there is a *rise in retirement ages* as governments struggle to fund earlier generous pension arrangements. What has to be considered is that the **age of retirement** will not only be affected by state pension entitlements, but also by attractiveness of retirement itself. So, what is happening is, not only, the fact that retirement is becoming social but also attractive, income levels do not fall dramatically (and permanently), the trend toward early retirement is unlikely to reverse. People are also likely to become more active in their retirement as life expectancy and health improve. Another development is regard to the **youth markets**, which is increasing in absolute terms, but also the raising income among the young, the growth of single person households and new social structures, which favor extended social and professional networks. This segment, from 16-35 age group, which will be very strong, is leading to more travel. There are some other social developments regard to change the structure of family, moving away from traditional family with two children; more single-person households; the change of VFR levels (visit to friends and relatives) which thanks to globalization many families have moved from their original home to other countries, and this trend has affects VFR. In emerging incoming markets such as China, India and Russia, short-term growth is likely to come initially from the older segments of these markets, but with improvement of their economies, in long-term will be the younger segments that grow. India has the youngest market and China will represent a huge phenomenon that will have strong impact on European tourism markets. From *economic point of view*, as the effect of globalization become more wide-spread, and resulting with increased of regional issues, which brings back on strengthening of regions. There is the era of services and digital economy, specially tourism, education, agriculture, which are very important in the European economy (contribution to GDP, employment, investment, etc.). Climate changes is the most discussed and concern issues in long term, having a negative impact in the development of some tourism destination whose appeal depends on their natural environment.

Impact on tourism sector and leisure patterns. All above will have *positive impact* in general in European *tourism demand*. One of the main factors to have condition for tourism is money and time. It seems that will be an increasing division between *time-rich* and *money rich* markets for tourism, and this is based on those segments of retiring on good pensions and which have no constraints on ability to travel. This is an important fact which will create more opportunities

for off- season products, impacting directly in eliminating seasonality. But also, there will be possibility for creating a growing demand for special services and more convenience in shopping and purchasing services. This is due to working age's segments, where the growing shortage of leisure times means that they are increasingly willing to spend money in order to save time. Anyway, the good impact on tourism is *the leisure time which appears to be growing*. For some key group the leisure time is becoming more pressured. While the working people have less time, the seniors have more. All this pressure on leisure time will lead on *more but shorter* trips. The bundle of cultural events, more products and local experiences, etc. will be base of short breaks during a year, which will open up opportunities for developing low-season festivals, events or local arrangements.

One of the main new products which recently is becoming very active and seems to be a challenge for next decade is *health tourism* products, beauty and spa services. This is related with the environmental changes and impact on health with created concern for health, and from other side, seas and sun is considered no more very good for health. This is main reasons why sun and sea products are shorter consuming, driving a growth in demand for health tourism, spa services and beauty concerns.

Leisure patterns are moving between “do-it-yours self” or flexibility products to *packaging products*. *Shorter trips but diversifying products*: more traveling not only for retired people, but for *young and active (youth market)* which are moving towards active holidays products: alternative forms as hiking, adventure, biking, birds and nature activities, local events, heritage, culinary and cultural issues, exploring the world and not remaining in the sea and sun: a lot to offer within the whole year. Sure, that this will be the challenges for European tourism destinations to move and adapt their standard tourism products to another path. If they manage well, they will decrease the seasonality, grow the incoming and employments, develop rural areas and vitalize the lifestyle, considering as attractions all the specific local values. Considering the main focus of the overall study in BRVPL, and based on the shifting concept of European destination duty to growing presence of protected areas, the conclusions that *shorter trips will be increased in the future, it will increase the number of tourists/visitors into protected areas, especially in coastal wetlands*.

Climate is changing, the impact on geography and food is very wide spread concern too, making in this way very crucial the idea of bio products. The growing awareness of finite nature for most natural products, the fact that village population has moved to urban areas, difficulties from trading *bio products* from undeveloped areas to urban ones, make very difficult to find natural products – and the needs to conserve them –will place a premium on the remaining “unspoiled” destinations. So, this has brought to the rising demand in those destinations which has their own *food local industry*, so basically for nature-based holidays, agritourism, eco-tourism, culinary, local festival or events in which are produced and marketed “live” tradition of a good food. *Culinary tourism* is very attractive within Europe, and sometimes remain the base reasons for visiting destinations. The concept of sustainability in tourism forced this issue and has brought the necessity of *certification* of “local branded products” or the accommodation structures.

Also, related to environmental concerns, local service providers, tourism business and operators will have to carry out *assessments* of the threats to their businesses from environmental changes. They will also need to develop crisis management and crisis recovery systems, or *environmental indicators models/systems*, or destination management organizations. This has been one of the reasons why new leisure patterns need *measurement* and data evaluation.

The *costs of making tourism will grow* in the future. One reason which flows from environmental concerns is related with the *cost of maintaining* natural resources for tourism, such as lakes, beaches, rivers, protected areas, winter sports areas, etc. Tourism operators and suppliers *will aware of their environmental responsibilities* as governments introduce new *legislation* to support sustainable development practices. Keeping in mind that the overall focus of study is related

to coastal wetlands, the tour operators and other tourism service providers should be aware for their pressure on protected areas. In this way, they will look for more sustainable practices; will collaborate with government to forecast the legislation and other issues in their way of making tourism in the future.

Economic development issues are connecting with some more consequences for tourism, which lead to modification of existing and creation of new leisure patterns. Europe needs to *strengthen marketing* of its destination, to diversify offer and develop new products. This needs to be sustained by a representation of traditional products aimed specifically to emerging source markets. Europe need to market itself based on *niche tourism markets*.

The idea of globalization brings rising of economies, which will create *new tourism destinations*. Globalization means also moving more freely across international borders, where Internet marketing will contribute to *more competitive tourism markets*, which previously have had difficulties to find and maintain *competitive advantages*. *Growing mobility* will affect *tourism labor markets*, as a higher level of jobs are filled by foreign labor. This will create *cultural problems* of the services provided, or sometimes approach of community to tourism investment since foreign labor is welcomed.

c. Marketing and Information Technology and Impact on tourism sector and leisure patterns

The idea of unique and organic products brought the definitions of sustainable destinations, which lead to the necessity of *marketing activities* as an instrument to promote sustainability in supplying the new products. Through marketing (digital marketing including social media, Web sites, viral marketing, blogs, video marketing etc.) those destinations are unifying and certifying their way to make and sell tourism, new leisure patterns, which basically has diversified tourism offer and has put a lot of challenges for destinations and tourism businesses. *De-marketing*, a tool on sustainable tourism has been used and recommends following on those destinations which have flows and risks in environment in some areas, and less development tourism flows in other areas. This will allow protection from destroyed of nature based activities and will spread tourism activities in other areas.

Word of mouth marketing, which means that consumers are seeking advice from other consumers, friends and relatives, has created the ideas of blogs and skilled consumers which know more on niche tourism products, travel more and their opinion is crucial for the marketing of a destinations. Tourism operators have grown their investment in adapting the right marketing and entrepreneurial *strategies for promotion*, and looking new research techniques to differentiate tourism offer as a tool for growing the competitiveness. This follows with a growing percentage of promotional, branding, tour operators create “leader of opinion” with individual or representatives’ groups from media, community, etc.; they are seeking *public/private partnership* not only in marketing of destinations but also increasing stakeholder involvement and marketing budget.

One of the crucial trends in technology, is not simply the Internet, but the advances in areas of *digital* and *mobile/smart phones*. *New electronic payment systems* are developed making an easier process of money transferring, exchange rates, or to overcome concerns about security of moving money online or transfer charges. So, consumer will grow the power and *control on prices, products*, competitiveness, will have in short time more and cheaper information on products.

Relate to the main *impact on tourism sector and leisure patterns*, there is a *changing in distribution channels*, moving away from traditional old systems of marketing to e-marketing/digital marketing. Internet will be a strategic instrument not only to attract new targets, brand destinations, grow the competitiveness, create strong database consumer relationship, but also the new role for travel agents and TO in the way in which they add value to basic travel and

accommodation products through their customer services; or *marketing of messages* will be based on *feelings and personal experiences*. This will require more personalized and tailor-made products.

Individuals for connecting other communities/destinations will use viral marketing as part of a marketing which will be realized on an entrepreneurial way. New search and mapping services will *increase expectation* before visiting the destinations. All the above will make aware the tourism operators on *growing the level of service/products standardization*, having every day the same level of servicing their products as have done previously with ex-consumers and that have shown in internet platform. Digitalization, technologies in mobile applications, has grown of cheaper worldwide communications, coupled with availability if inexpensive transport, *will increase travel and tourism volumes rapidly*. Based also to the impact that economic growth has created, both will produce higher number and data of people traveling around the world. Europe has to be prepared for more capacities, educational and skills, and better diversifying of products/services offered.

d. New skills and occupational field

The evolution of tourism has been constantly accelerating. New tourist trends, new technologies and the growing requirements of an increasingly individualized clientele have generated altered demands on tourism employees. Competition within the industry has become tougher. Service, and hence customer orientation and professionalism, are priorities. All those global drivers of change represent opportunities and challenges for training and skills development. The vital importance of this part of study is related with the fact that labor and skills are a crucial component in the tourism supply chain. Enhancing the quality of service is pivotal in building a region's reputation both domestically and globally, and making it competitive in the international marketplace. It ensures that once tourists visit your destination, they will want to return and bring others with them.

What is important is that economic, marketing and digital trends and development in Europe will need and search for developing more tourism infrastructure, more capacities – hotels, resorts, transportation, tourist destinations, and other amenities – but is not enough to meet the needs of this rapidly expanding tourism industry. The government and tourism private enterprises must invest in tourism and hospitality education to fill the critical gap in workers who understand international best practices, but not only. Europe has invested a lot in infrastructure, but now is the time to invest in human resources and skills development. Especially there is a lot of changing in leisure trends in the future.

The supply of human resource to travel and tourism is broad and comes from many sources given the diversity of sectors, occupation roles and range of skills requirements. Some *employee skills are transferable* across travel and tourism sub-sectors and from other sectors in the economy. But some other talent requirements are more specific and are supplied from more narrow and well-defined sources. This brings to the conclusions that in addition of enforcing basic education it is crucial the working people in tourism industry need to enforce and enlarge their knowledge during work through training or other professional education methods.

In this phase of tourism in Europe a lot of skills and knowledge are needed to support the tourism growth and to sustain destinations in their mission in supplying experiences to tourists. *“Tourism begins at home”*, as one of the main principles of sustainable tourism which keep in mind that tourists should learn about culture, history and values of destinations at home, avoiding cultural misunderstandings, and *“tourism can end up in remote rural areas”*, which means that tourism brings together people from different culture and distances. This grows the need for basic *soft skills* as: *communication, foreign languages, and technology knowledge (from a simple reservation to digital tools usage)*.

Management staff described their experience of hiring staff as difficult with the greatest challenge for higher skilled and more professional roles. Recruitment/selection and training of employees are indispensable for the creation of a high-quality service climate. The competition increasing considerably causes the industry to face not only a recruitment problem, but also a challenge in retaining these young workers. Some of the major reasons for the increasingly severe retention problems faced by the tourism industry are closely linked to the ebbs and flows of its business cycle. Seasonality heightens the peaks and troughs even further. Leading to a substantial number of part-time, temporary and casual workers in the industry. Many young workers leave the industry when given an opportunity elsewhere.

Alongside ITs, chefs and other technical roles, other jobs particularly difficult to recruit are: manager for customer complaints, manager of new products, or head of waiters, and food & beverage managers. Skills and professions imbalances in tourism take many forms, covering both shortages and surpluses:

- Shortage or surplus of job-specific skills, e.g. foreign languages, IT, web designer and development
- Shortage or surplus of certain soft skills, e.g. customer service, problem managerial solving
- Shortage or surplus of particular occupations, e.g. chief of reception, chief of kitchen, head of marketing, head of new product and branding.

Skills required trainings and capacity building needs and trends in knowledge and skills differentiate also according to job opportunities in different subsectors of tourism industry. In the hotel industry, the majority of the jobs involve cleaning, which can either be carried out by the staff or outsourced to specialized companies. Jobs involving personal services such as receptionists and night janitors are less numerous. Luxury hotels also employ porters, doormen and bell-boys. Some members of the staff might manage to be promoted to supervisory or managerial posts, but the high-level jobs are increasingly reserved for those with specialized diplomas in business, accounting, management, company strategy and so on. The career prospects of operating personnel are therefore often limited, especially in reception-desk functions, making the hotel industry above all a means of entering the labor market before making a change of profession.

Staff for tourism services need to have educational and psychological qualifications and creative, communication and sports skills. Travel representatives need to be helpful, friendly, enthusiastic, independent, and communicative and to possess organizational skills, considerable initiative and the ability to foresee potential difficulties, maintain an overview and work under pressure. Additional requirements are general (job-related) knowledge and skills in their specific area of activity, such as: sales and customer advice; awareness of legal matters; familiarity with destinations, tourist products and services and extras; computer and Internet skills; ability to use various holiday booking and travel reservation software; basic educational and psychological training. Other prerequisites are business sense and skills in areas like economics, marketing, public relations, cost-benefit accounting, auditing and statistics. Skills in foreign languages, communication and presentation techniques, discussion leading and rhetoric are other essentials.

Recruitment and retention difficulties, coupled with insufficient internal efforts to train and develop staff, result in internal skill gaps of varying severity, depending on the employment practices of individual organizations. Skill gaps have been shown to be most severe for the following:

- . information technology skills;
- . literacy and numeracy;
- . communication/presentation skills;
- . customer handling/service;

- . problem solving and critical analysis;
- . leadership skills;
- . financial management and cost control;
- . project management.

The scopes of the new occupations and the related skill requirements follow the division into the individual areas of holiday booking and holiday design, tour guiding, business trip organization and travel agency support, some technical and managerial skills. In this era of evolving new destination concepts, new packages skills need to lead the development of human resource management in tourism businesses and travel operations, which are directly related and served to tourism business:

- Need for more specialized local tour guide and/or specialized tour agent (for personalized travel), Also, specialized for destinations such as protected areas, coastal wetlands with environmental/biodiversity background/knowledge, or just specialized for protected areas that require particular knowledge as far as behavior etc.
- Travel designer, online travel agent and event designer in holiday booking and design;
- Professional jobs which are in contact with tourists and reflect the level of standardizations as welcomed persons, customer care, waiters, rooms services, product selling;
- Tour representative for people with restricted mobility, animator and guest relations and travel services representative; Business travel manager for business trip organization;
- Top Management skills as new tourism products marketing and managements, destinations branding, demand management, web designer, etc.
- Lack of certification and categorization of jobs in these businesses flows with necessity for peoples who put international qualifying process of certification and standardization in the current capacities.
- Also, there are some new prospective jobs which doesn't have specific nomination but can include more technical covering, for example in Agri tourism women's can sustain with several services. In this case basic soft skills are more than necessary.

The necessities for growing capacities in hospitality face the challenges of owner and manager of tourism business: their capabilities to invest in human resource management, or to forecast capacity number of beds, accessibility, number of places in beaches, distances from other hotels etc.). In addition, they will face the necessity of certification and standardization, which sometimes is an international process. The employees in the tourism sector lack professional skills, communication and teamwork, are unmotivated and need emergency training in order to improve their capacities and provide a quality service.

At the end, since more short and specialized tourism products will be growing and develop in the European future markets, this will be accompanied by a necessity for specialize skills from all stakeholders which are include in nature-base/ecotourism/Agri tourism development sector, ending towards more sustainable tourism practices. The vision of the Albanian government after 2013, inspired by the overarching goal of Europe 2020 to deliver smart, sustainable and inclusive growth – is to have by 2020 a competitive economy and an inclusive society that is grounded on: *“Higher skills and better jobs for all women and men”*. The overall goal of the Strategy is to promote quality jobs and skills opportunities for all Albanian women and men throughout the lifecycle. This will be achieved through coherent and concerted policy actions that simultaneously address labor demand, labor supply and social inclusion gaps. The main objective is the identification and design of proper employment promotion policies including the vocational training of the labor force, in order to create quality jobs and skills opportunities during the whole cycle of their lives.

4. Existing State of Tourism Activity in BRVPL Area

After the above desk research, the main objective of the study is to identify needs, gaps in knowledge, skills and capacities of tourism operators in the BRVPL through a field work. The following represent the second part of study related to Existing State of Tourism Activity in BRVPL Area. In order to get the right feedback, using the bottom up model, there are gathered the whole information, knowledge and ideas from all actors, since from visitors/tourists to important public institutions or even individual experts several, and 4 questionnaires are used for fulfilling the main objectives of this part. All quantitative and qualitative questionnaires and methods used are explain in the part 2 of this report: methodology.

a. Analyses of the Tourism Supply

There are some indicators that can be used to evaluate the state of the art of the tourism supply. First of all, existing infrastructure must be evaluated. Tourism supply in the BRVPL area depends on infrastructure that include the basic industry infrastructure such as accommodation and food and beverage infrastructure and supporting infrastructures such as roads, different trails and areas, other light infrastructure, etc.

Existing infrastructure: The Percentage of accommodation in the total businesses is 26%, while in the category of bar and restaurants there are 21% of the businesses interviewed. Most of the businesses in the tourism industry deal with the accommodation sector and food and beverage sector. The infrastructures related to these sectors are all offering the basic services. But there is also a small percentage, 6%, that is offering multiple services in different subsectors, which implies the basic infrastructure of accommodation, food and beverage, but also other services.

As far as capacities of the accommodation of tourism structures, figure 2 below is showing the average values of the indicators used to describe the structures. The average number of units in the structure (beds, or tables) is 39. The average number of tourists registered for the 2017 is 368, while for the first 6 months of 2018, the same average is 234, which means that the trend is positive, according to the capacities of the structures.

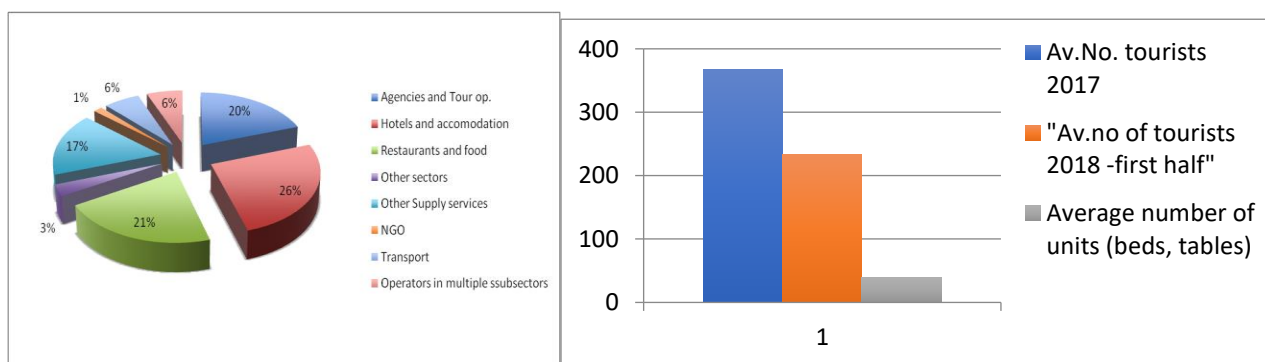


Fig 1 Main industry infrastructure and services according to business sampling

Fig. 2 Average numbers of capacities and tourists

Another important point of view related to infrastructure is the customer preferences and actual use, in the area. What are the infrastructures that are the tourists of the BRVPL area actually using? The question results about the accommodation type of capacities more used and selected by the customers, show that the most used are hotels, with an average of 52,4 % of the cases. It is followed by the guest houses with 34.7% of the cases claimed that tourists

use and select the guest house for accommodation, then by 26.6% for rent apartments and last remain the camping structures that are used and selected by the tourists in the area.

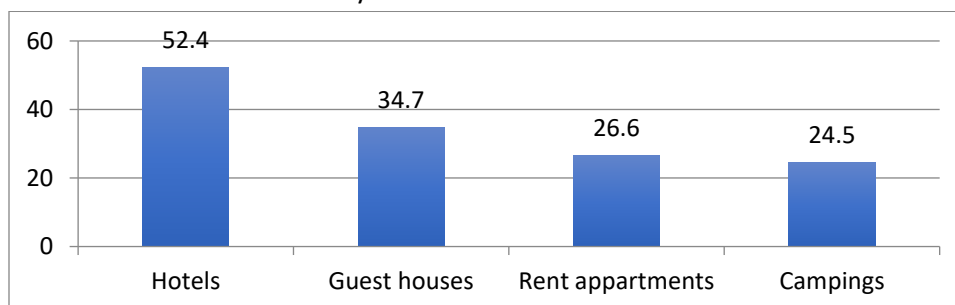


Fig 3 The tourism structures preferred mostly by clients in the BRVPL area

Roads, highway, paths within the cities are very important for the hospitality industry. The Tourism infrastructure, which sustains tourism supply, as a complement to the basic service infrastructure, is also very important to complete the quality of tourism supply. This importance raises especially in areas with a high sensitiveness for the environment and the resources related to flora and fauna, climate and (Hiking trails (74.2%), Hiking trails 27.3%, biking trails 34.8%, picnic areas 48.5%, minibuses 4.5%).

According to questionnaire data, there are some of the supporting infrastructures that are mentioned by the businesses as a main resource in the tourism business area. The greatest percentage, 74,2%, mention the roads, highways and pathways as the main supporting infrastructure. The picnic areas are in the second place, mentioned by the 48.5% of the businesses. While biking trails and hiking trails, which support more alternative forms of tourism and in fact, only part of the tourism market which is trying new tourism products and services, are in minority mentioned by the businesses. This is a background that indicates an infrastructure that is supporting positively the classic tourist of Sea and sun, the classic services of accommodation and food services. The infrastructure is also supporting visitors such as picnic areas, *but there is more need to support by infrastructure other forms of alternative tourism.*

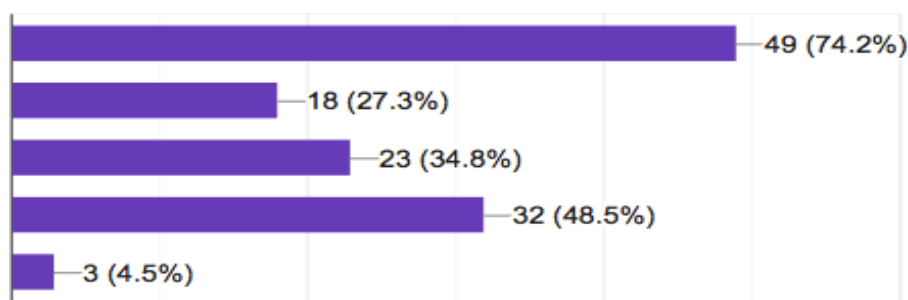


Fig 4 – Supporting infrastructure as a main resource in the area.

Services and Products. A perception on which are the main *tourism products* that BRVPL offers for the moment, is very important for evaluating the tourism supply and identifying the opportunities and challenges for the future. The service level also is part of the tourism product in this regard. As shown in the figure 5, the question has asked which is the market that mostly is consuming each of the products that are present in the area. The market is divided into 4 main groups: Albanian market. Albanian outside the borders, (i.e., Albanians of the Republic of Macedonia, of Kosovo, Montenegro), Albanian emigrants and foreign visitors. The graph shows that there is a somewhat balanced

selection of different products by different parts of this market, but only Nature based tourism, which includes also bird watching, adventure tourism etc., is preferred mostly by foreign visitors, in more than 40% of the cases. In the second place by foreigners is the culture heritage tourism, around 30%. While Sea and sun tourism, is mostly preferred by Albanians. Albanian population living as emigrants or outside the borders, prefer mostly the Sea and Sun, cultural and heritage tourism, in around 15% of the cases, for each product category, while other products are less preferred. Culinary is also preferred by Albanians and foreigners, but not so much by the Albanians abroad. (in blue is Albanians, in red is albanian outside the borders, in yellow is Albanians living abroad as emigrants, and in brown is others).

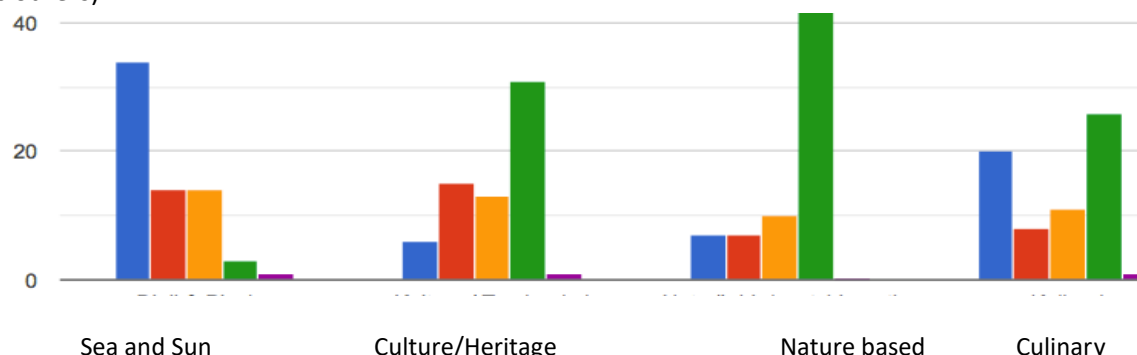
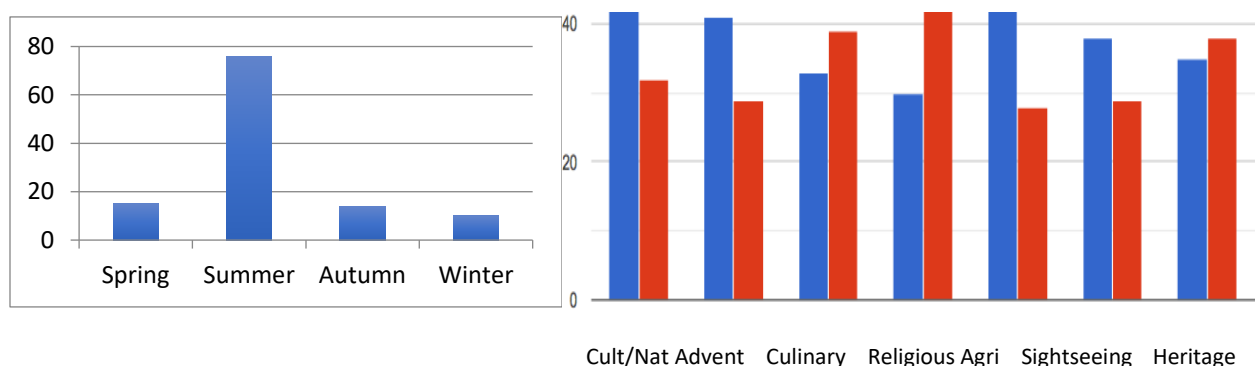


Fig. 5 Tourism product in the BRVPL area according to tourism market

One of the characteristics of tourism product is the seasonality. Fig. 6 shows the average percentage of occupation during the seasons. It shows that summer is the peak season, while the occupation is very low in all the other seasons. Improving tourism product, means also the improvement of the product and service bundle. There are two components in this improvement, the product side and the service side. The need for improvement in different types of the tourism product is shown in fig 7. The percentage of interviewed that have claimed the need for improvement has not great differences among all types. But it can be seen that this need is represented more to the nature sites and adventure tourism, as well as agritourism. While products such as cultural sightseeing and cultural heritage and culinary tourism, are steadily growing. *The improvements have to be present in those products and types of tourism that are mostly important with the area, more related to nature-based tourism, because of the characteristics of the protected area. This is to show that also businesses are interested to protect their area, by improving those elements of their tourism supply that will bring sustainability in their site, which is the bases for future success in tourism industry.* (in blue is growing trend, in red is need for improvement).

Fig. 6. Seasonality of the tourism product

Fig 7 – The raising trend and need for improvement in tourism product



The businesses interviewed have evaluated their service level and this is shown in the graphs below, in figure 8.1. (in fact in questionnaire is detailed this evaluation in more than one request), which shows the evaluation of service level in support of tourism product, the service level in the accommodation structures, the level of knowledge and service of tourism guides, of the staff directly in contact with the client, in online reservations and social media reservations and questions, as well as those of the staff in other structures such as museums, information centers, etc.

The evaluation of the overall level of service is good, with 47% giving 4 points. The staff directly related to tourists is evaluated very good, since it has only positive points, 3,4 and 5, with a percentage of 30.3 that gives 5 points to the level of knowledge and service of this staff, who is very important for the service quality. The level of knowledge and service of tourism guides is also evaluated as a good element, because around 52% have given a positive evaluation of 4 and 5 points. The online reservations are rated even better, with 60% giving a positive evaluation. Around 59% are also giving a positive evaluation for the service level in the accommodation. (in blue is growing trend, in red is need for improvement, brown is need for specialized knowledge).

Even though the service level in the above-mentioned components is rated good (4 and 5 points), the interviewed businesses think that some aspects of the product may improve, especially some aspects that need special knowledge and capabilities. More improvements are required in the level of knowledge and service in other structures such as museums, info centers, etc., but also in the service in accommodation and the overall level of service. While more specialized knowledge is required in tourism guides, in the staff directly related to the client and in the third place is the internet-based knowledge.

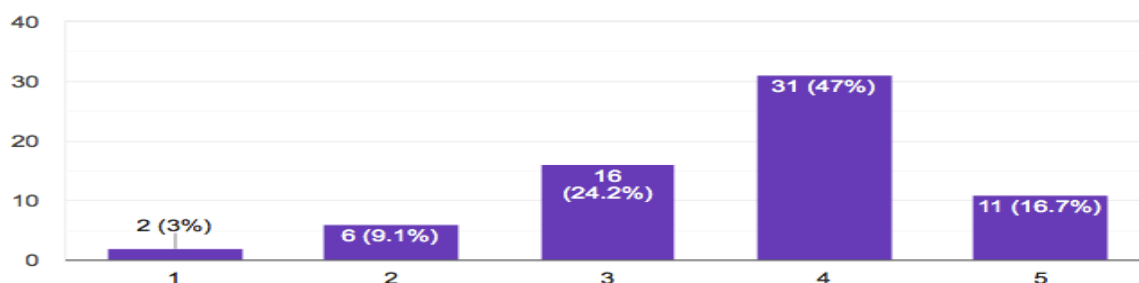
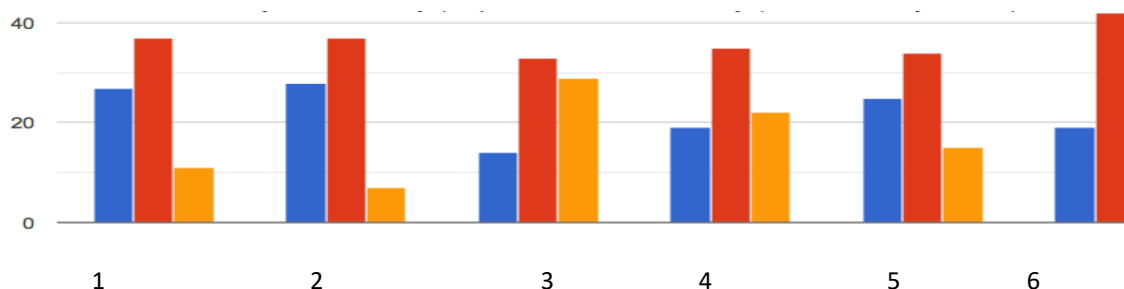


Fig. 8 The evaluation of service level according to tangible and intangible elements

Fig. 9 Opinion on trends and service improvement



1,2,3,4,5 and 6 are all the components of service evaluated in the figure 8, with the same order

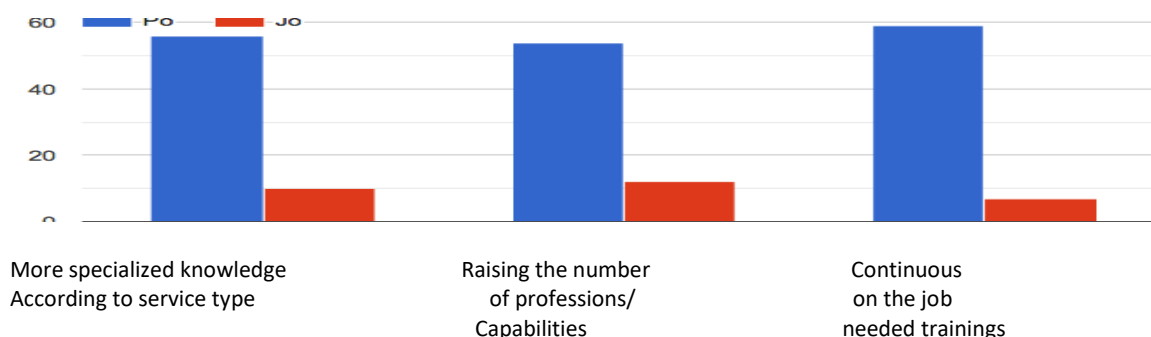


Fig 10. Suggestions for improving methods

All the suggested improvement methods are seen as important and worthwhile by the businesses. In fact, the figure 10 shows that a high 50-60 percentage have accepted that these methods can be used to improve the services. The factors that are mostly mentioned as important, given a great importance for improving the service and the climate of the business in tourism are shown in fig 11, where the mostly mentioned is the investment factor. The human resource factor is also the second most important, but with a small difference from the other factors.

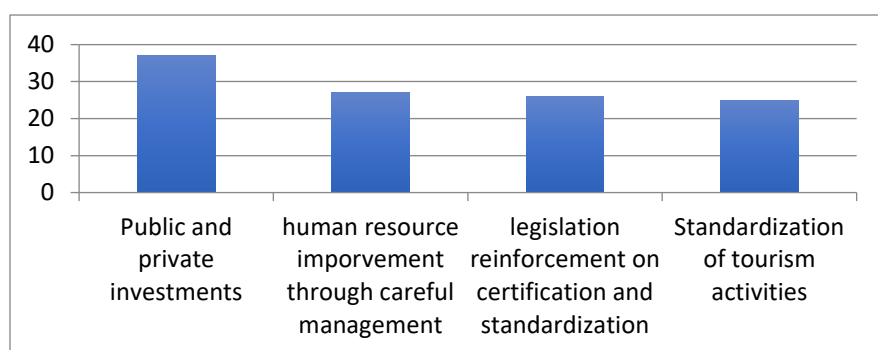


Fig 11 Factors that impact the improvement of services and tourism business

The idea on perception of **Carrying Capacity**, assessment is important for the area since CCA is a tool to evaluate and measure in some way the level of development. As shown in the figure 12, the businesses are sustaining more the social capacity and geographical capacity, and in the third place the physical capacities, while 17% are not sustaining any kind of carrying capacities. This percentage is in fact a problem because of the lack of knowledge of the importance of this concept for a sustainable destination.

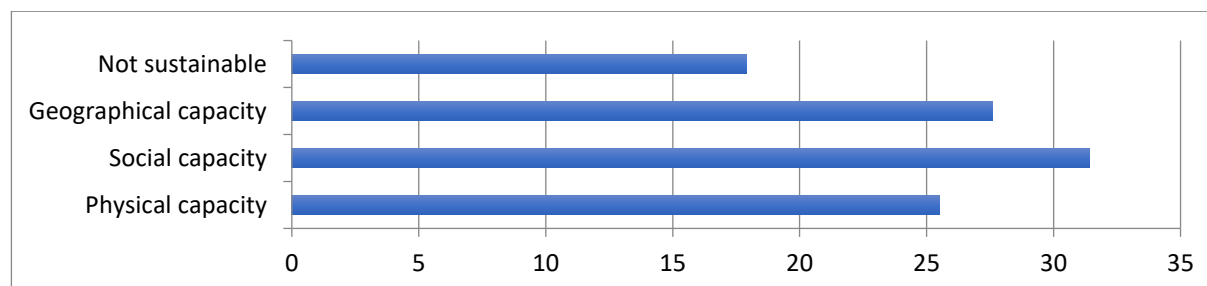
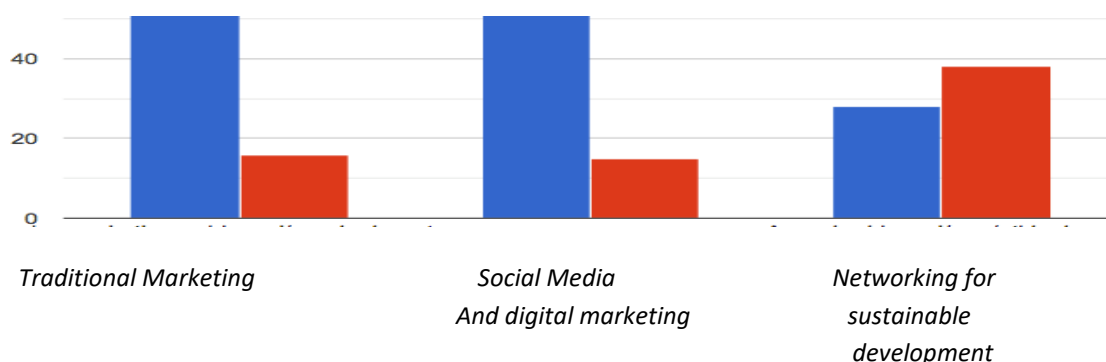


Fig 12 Business opinion on supporting the components of carrying capacities

Accessibility is related to the level of infrastructure usage from people with disabilities. Standardization of tourism services is a European condition for a sustainable destination. All the businesses interviewed claim that they have not any structure for the access of disabled and this is a real problem when speaking of the comparison with structures in European union. In fact, this is a problem in general for all businesses in Albania, but for tourism businesses it is vital to adopt in the process of gaining a raising market in Europe and the global marketplace. On the other side, also the standardization through different certification schemes (stars, level of service and staff etc.) is lacking in businesses in BRVPL area.

Marketing activities. Tourism operators/NGO/public institutions are currently using the marketing in order to promote their products/services. the level of usage of traditional marketing is almost the same as the level of digital marketing. 50% of the businesses have used traditional marketing and digital marketing actions. The latter is used especially through social media, especially through their social media pages, Facebook and Instagram, but also through Web sites. Other forms of digital marketing are not as well known (in blue is yes, in red is answer no).

Fig 13 Percentage of businesses that are using Marketing and networking



Challenges for a sustainable tourism in the BRVPL area and human resources. The challenges mentioned by businesses in the BRVPL area are more related to the level of accommodation capacities, which are claimed to be low, especially in the conditions of a growing demand from the international market. Other problems are low level of standards in infrastructure and also the lack of training of employees in tourism industry.

Tourism should be based on networking which is considering as an important component for a sustainable approach. The perception on stakeholders for this issue and their vision on how to improve or better organize is shown in the third column of the figure 14. The level of networking is low and it is a field where to focus with the policies in tourism industry.

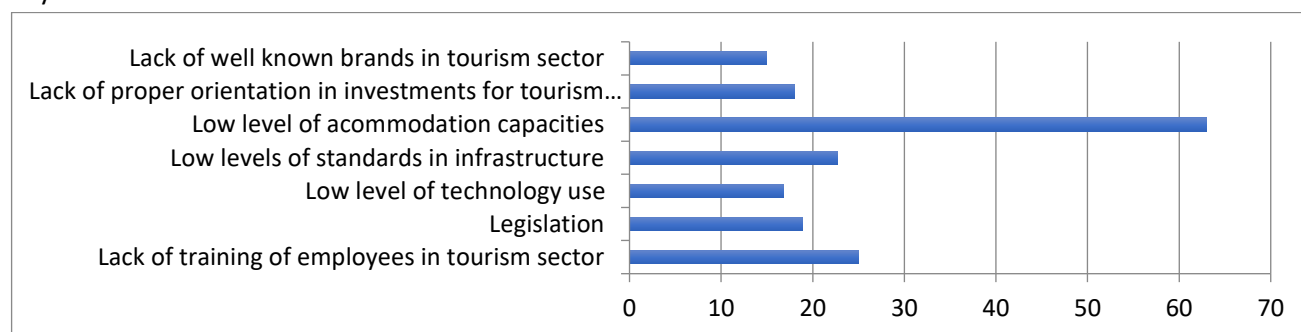


Fig 14 The businesses in the area challenges

Since the level of service and also the tourism product is in a great extent dependent on the human resource component, the challenges in this element must be tackled as soon as possible, to insure the necessary improvements. As shown in the fig 15, the elements that have gained the greatest percentage are the knowledge improvement through education, adding new capabilities in tourism sector and also raising the number of professional training schemes.

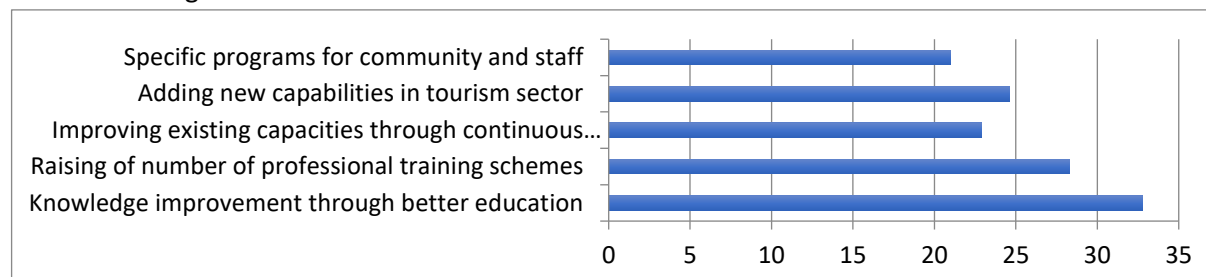


Fig 15 Ways of improving human resources through strategic planning and action of local government

b. Analyzing the Tourism Demand

The full picture is realized through ending with demand, where some main point is as: statistics of arrivals, occupancy rate, identification and assessment of needs in terms of infrastructure and services, etc. both analyses are considered crucial since measurement is considered as one of the main challenges for whole Europe.

A. Statistical arriving regard to incoming analyses are based on the data that hospitality sector represents in this study.

A perception of incoming. Regarding the arrival statistics and opinions over the years in relation to the growth rates of the incoming flows, there is a positive perception by the tour operators. Thus, as the overall business valuation is not perceived as negative, but in average positive estimates (34.8% think positive increase in the number of entries, from -1 to +5, they estimate +3), regarding the origin of the entries, it is noted that the number of Albanian tourists from within the country visiting the zone is positive (+3) and is valued at 40.9%, as well as the growing tendencies of the inflows of Albanians living in Kosovo or those living abroad (in migration with 37.9% of inflows). Foreign flows have positive tendencies, and this is assessed not only by questionnaires but also by the perceptions of tour operators who are optimistic about the situation and the future, but are skeptical about the short stay of foreign tourists in the area and with the massive attendance of the sun and the beach which still constitutes the dominant form of tourism products. Meanwhile, the largest (over 17%) of foreign tourists come from Europe, and the rest is spread to other countries. It should be underlined that the time of interviewing was 10.12.2018 to 10.01.2019, and this is normally considered out of season, for this reason it is justified the large number of Albanian tourists or Kosovo and the small number of foreign tourists. But from the perceptions of tour operators referring to the last two years, it turns out that Asians and Europe make up the main markets of origin, are growing, and massive. Meanwhile, interest is also growing for culture, tradition and culinary history.

Regard to general information as the first session of questionnaire for tourism demand results that mostly the tourists/visitors has been national tourist, since from Shkodra, Tirana city, Durres, even from the very south of Albania as Saranda. Also regard that results mostly shows the tourists/visitors has been national tourist, this is also due to the fact that most of them (72%) have traveled by car and some (20%) by bus, and this refers to being close to the

country of origin (both charts are below). Also, as it is shown below in the fig 3, during the stay at the destination of BRVPL, tourists preferred to use taxis or buses, private cars and there is an increase in the use of public transport (by 18%). This is in fact to be promoted as it is considered very positive in international terminology the tendency to use public transport rather than private means. This is related to reducing the noise level, improving the environment, and constitutes an indicator of sustainable development.

What is considered impressive is that the majority are young (38% of people over the age of 35). This is a good sign for the Albanians who travel and like traveling within their country, because it shows a tendency to respect the way of traveling proposing and recommending the principles of sustainable development: *"a country cannot develop a good international tourism if the residents have not traveled and visiting their country"*.

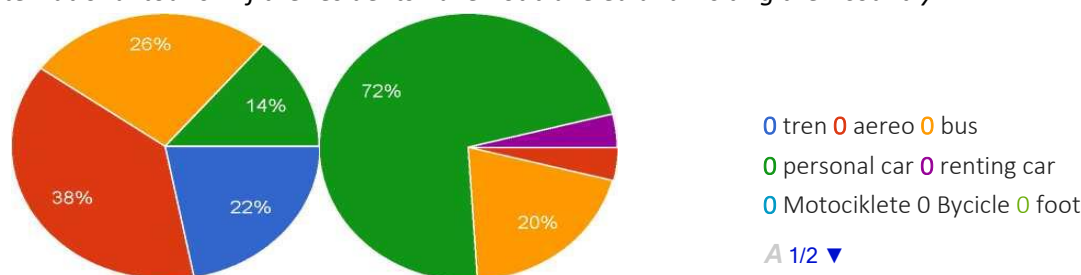


Fig 1.2. Average Age group of tourists and primary mode of transport used for traveling

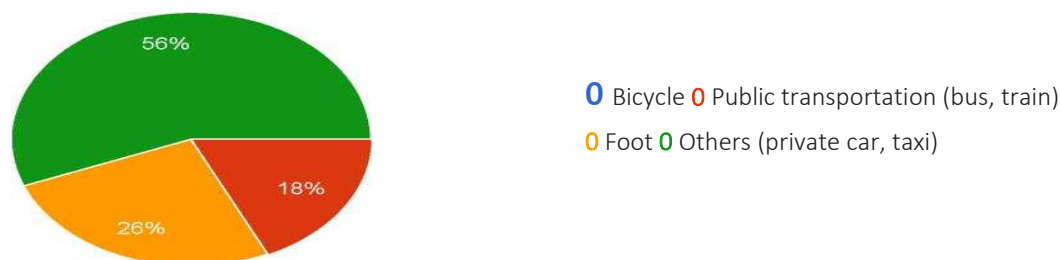


Fig 3. Method of transport that tourist has used or plan to use during their stay in destination

With regard to entry flow statistics, it turns out that over 80% of them are full-time employees, considerable even are students (12%) or part-time employees (8%). The absence of pensioners' groups in these results is explained by the time of the interview, as based on the perceptions of the operators, the incoming tourism flows of international tourists at the time of the tourist season are dominant, and the middle ages are particularly dominant, especially Asian or European pensioners quite present in the area.

Concerning the **level of occupation**, the following analysis is made: Technicians, experts and specialists of the field, but also tour operators were asked and consulted concerning the level of occupation. Assessing the level of capacity occupancy results over 50% of the time spent in summer, passing to 20% in the spring, and so in autumn and less than 10% in the winter. This shows not only the high level of seasonality but also the lack of proper capacity building at the time of the tourist season. Experts relate to the poor marketing of the destination, lack of knowledge, low level of foreign services and language, skills, etc.

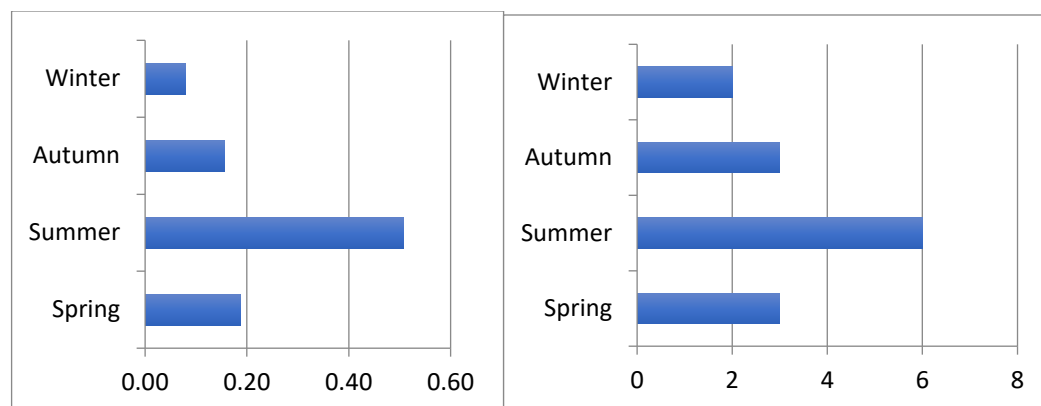


Fig 4. Average percentage of Level of occupancy Fig 5 Average Number of nights of stay/tourist

B. Why they would be come back again, how many times is visited, satisfaction with area, etc. will be some other information related to this section. The frequency of visiting of the BRVPL area is again interesting, the number of times visited is considerable and quite common. 56% were for the first time and 44% were other times. In addition, tourists who have been at least one time asked about the frequencies of the area's frequencies the high number of times that a tourist has been in area in the last 5 years ranges from 3-4 times to 20 times. This shows that even for Albanian tourists the area presents great and growing potential. This is also explained by the fact that despite the intensity and values of the use of sun and beach products as well as the *curative effects of climate in this area*, the perception of tourists for culture and the level of tradition that this country represents is relatively high compared to the other places in Albania. This means that the *overall assessment by Albanians themselves* of the area (but also of Kosovo Albanians and diaspora) is *high, substantial and qualitative*. But of course, the presence of the Albanian youth in this area shows a lot more about their interest in the history and tradition, although not all the countries that represent and present culture and heritage are recognized, evaluated and visited, again constitutes the motive for the attendance of this area.

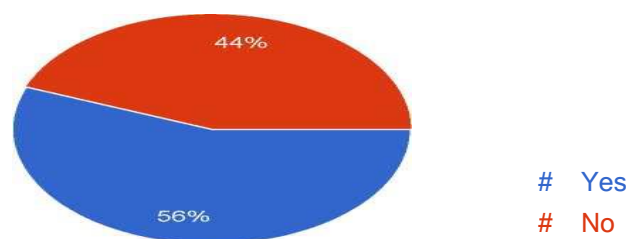


Fig 6. Was this your first visit to this destination

It is important to understand if tourists, whether they come for the first time or sometimes in the area, will want to return again. Some of the reasons that tourists associate with returning to destination refer to the most: the attractiveness of the area, the beauties and natural potentials, the food, the culture, the tranquility, the traditions, but the beauty of nature and tranquility are distinguished as the most favorite. The fact that tourists prefer to return to the area and mainly for the motives of nature, food, culture and tradition, is a natural policy orientation where the local and central government is to focus strongly on the development challenges but also on the take measures to protect them and increase the economic and social benefits to the community from them.

Getting the right source of information when choosing to visit a destination is one of the strong arguments that shows which marketing tool has been effective so far for attracting actual tourists. This is very important since the source of information nowadays are endless. Recent estimates of sources of initial information about what tourists select when choosing a tourist destination show not only the efficiency of the tools and marketing activities used so far, but also promote future spending promotional campaigns and marketing plans. For example, from the analysis it turns out that over 56% of tourists have received information and found the appropriate area to be visited by friends and relatives. This shows that the actual satisfaction of tourists is a powerful potential for the fact that today's tourists will make the best marketing to bring other tourists. This is called "buzz marketing" which is quite popular in the world.

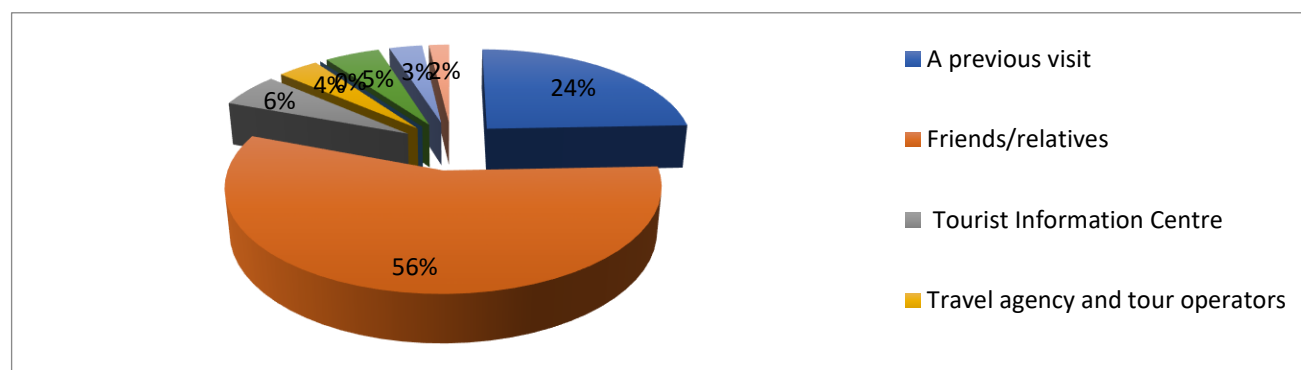


Fig 7 Percentage of tourists by the source of information for tourists

Marketing of actual area which is studied as tourist destination is the marketing of tourism products/services. As long as the tourism sector is particularly a service sector and over 90% of the products are tourist services, then the pleasure of tourists is taken from the services rather than the products, consequently the services (quality, standard, certification) that make the best marketing, and why tourists speak good (or bad) about a destination, making other tourists because of this communication (buzz marketing or word of mouth marketing) to visit the area (or not). A general perception of the *ratio of national and international tourists* has been made through discussions and opinions of tour operators, as well as confirmation of their information with those of public and private level experts.

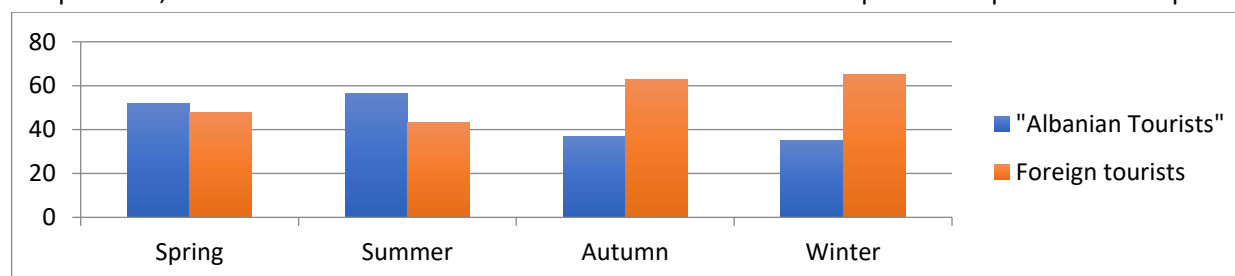


Fig. 8. Average percentage of Albanian and foreign tourists

C. Which are the main problems, lacks and factors that minimize the potential of incoming? What would like to improve/support hospitality sector by the state, or what can exactly be done by themselves in order to get more tourists. The tourists are asked to express that besides why they would like to come back again, or what is the

main purpose of visit to this area, to orient what are the main characteristics that attracted him to visit the country, i.e. the initial reasons that led to push him/her in selecting the destination.

The main purpose of the arrival of tourists is in fact the starting point of analysis and chain linking of the factors that encourage them to visit, followed by the determination of the factors for returning again, or the characteristics of the area that are arguing to visit the area and finally why they would come back again. Below are also given two other graphs that include the purpose of the visit and the characteristics of the area they want to visit when they arrive. Almost all of the charts belong to this analysis show that the reasons for coming to terms with what they visit when they are in the country, but of course are not the reasons why they would return again. This is because of the problems that have reflected some of these motives/reasons.

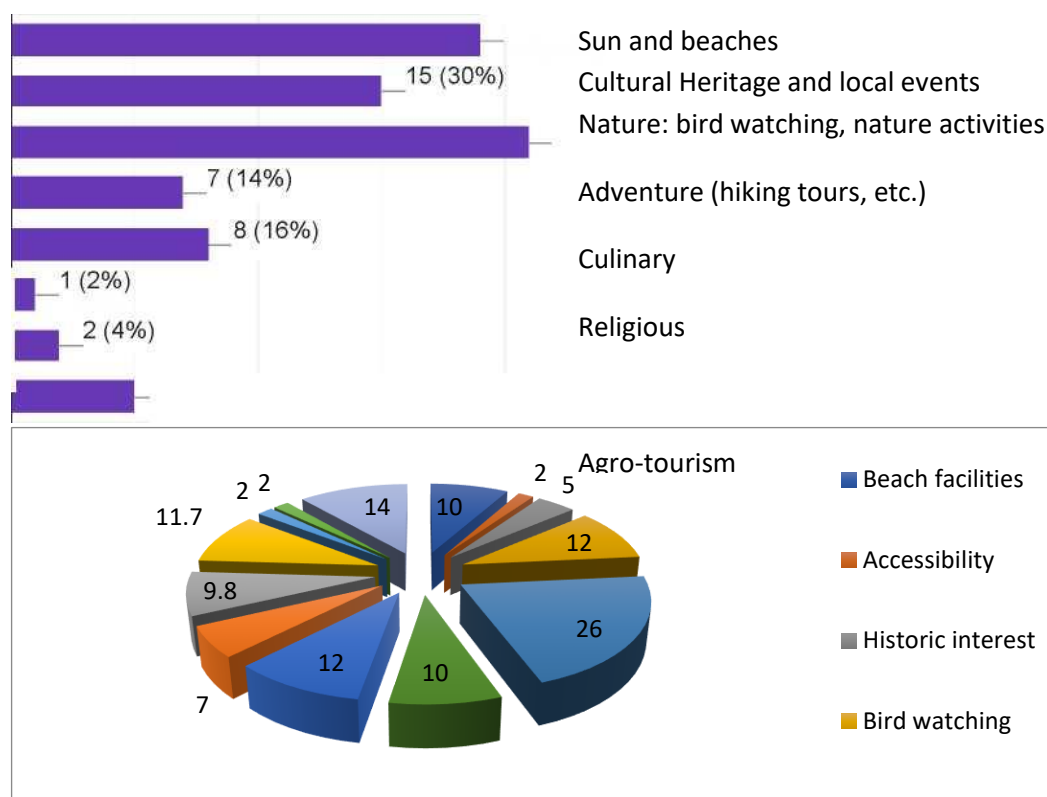
Analyzing the motives of the coming, will it be restored, and why would it be again made up of a continuous argument and a chain that clearly faces if motivated motives are the same as those that will be retrieved, and if there are differences or deviations from the reasons then a detailed analysis needs to be done because in those factors that the tourist may have chosen when he has come can be turned into obstacles or negative if they do not constitute a reason to be returned. For example: 21% for nature: bird watching, nature activities and for the peace and quiet that the area offers, 19% for beaches, 15% for Cultural Heritage, followed by Adventure (hiking tours, etc.) with 7%, flora and fauna, culinary with 8%, religion, business, entertainment, etc.

Tourists generally find that they are quite happy with their visit to this destination by ranking +5 (from -5 to +5) to 40%. Despite that there is noted a sense of positivity in the satisfaction of visiting this destination, the perceptions of tour operators, as well as of the technicians and specialists of the environment and tourism, identify that the level of services, service culture, reception capacities, impurity and environmental damage represent honor the main reasons why a tourist would not be satisfied with his visit to the area.

In fact, there is a compliance for the fact that *nature and environment are reasons for coming and returning again, but are not mention the flora and fauna, recreation, beach and nature activities as a reason to return again*. This means that the area is well-known at national and international levels for the above reasons, but their development and level is not at the level of returning to returning to the country. Pollution of the environment, beaches, water, waste and impurities, lack and not oriented activities in nature, lack of promotion of visits to places where there are rare birds, still constitute factors that prevents and does not stimulate the country and consequently the development of tourism in the area.

Clear identification of the underlying above factors, the orient the politicians through among the reasons or factors that motivate the return of tourists, consequently increase their spending in the field, improve the image, and promote investment in the right directions. As the perception of tour operators should serve to stop/inhibit the growth or existence of other factors which turned not just in a simple reason of not returning again, but into a factor hindering development. As explained above, the tourist is quite sensitive to the level of perception for tourism services that receives in the destination, and easily offers an opinion on what can be improved. On the other hand, it resulted (part 2 of this analysis above) that marketing of tourism service is very important relate with the future flows. Therefore, in addition to the perceptions of tour operators, the following opinions of tourists not only make an analysis of the main problems, but help the public and private sector in their decision-making what to improve in the future with regard to knowledge, skills and capacities.

Fig 9, 10 The main purpose of tourists visits in the area



D. Analyses of tourist's opinion on knowledge/skills/capacities. Over half of tourists use hotels as the basic accommodation unit. Based on tour operator's opinion, this is related to the perceptions that tourists have in a hotel structure, that the package of services offered is the most complete and the service is more qualitative than for example rented houses or guest house.

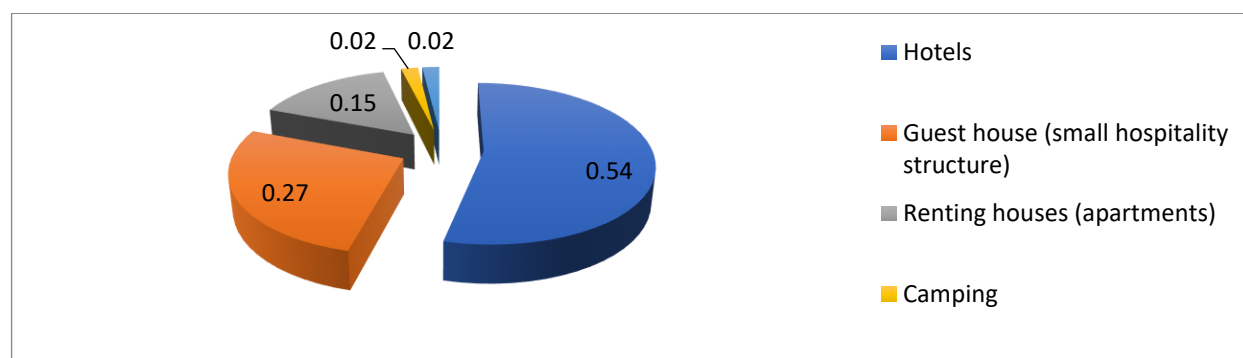


Fig 11 Percentage of tourists by accommodation used

However, over ¼ (27%) of the respondents were accommodated in the guest house during their stay and this is impressive and good development for the future. Again, these accommodation units, as tour operators are perceived to be much friendlier and welcoming by tourists. So, the choice of accommodation structure relates to the perception

that a tourist in general has for it. Do not even stay behind rented houses. There is some conclusion regard to this aspect which also are reflect at the conclusion part, as:

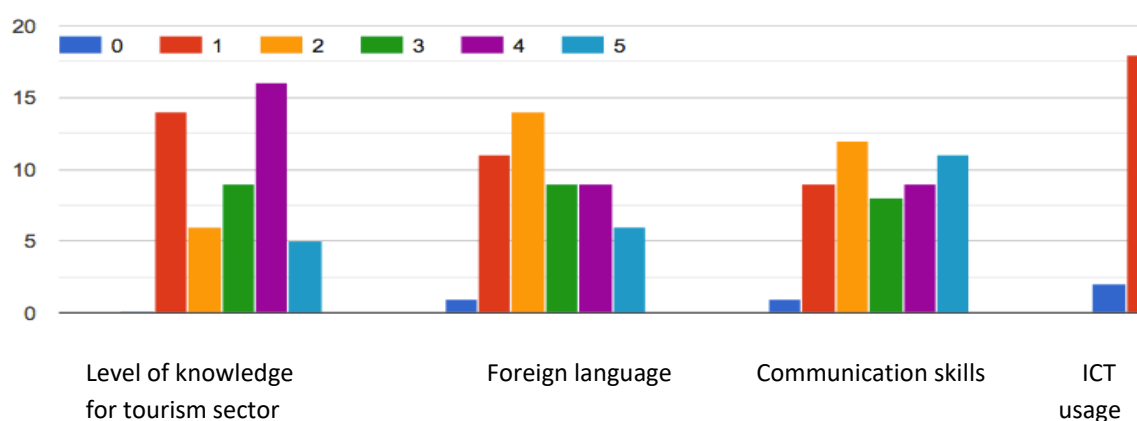
- The tendency to accommodate the guest house will be positive and growing in the future because not only for the fact of perception that tourist have for them, but actually TO are investing in growth of those capacities. Also, hotel structures still have many problems with basic services refer to services, low number of rooms, etc.
- the owner of hotel accommodation facilities (hotels) should aim to construct and develop hotels with a large number of beds. This is because, according to Tour operators' perceptions, in the tourist seasons the flows of Asian and European tourists are high in number and the current capacities cannot be covered. On average, a hotel has 10 to 25 rooms that in summertime cannot afford fluids that are large and owed and distributed to other hotels.
- Investors and operators should be encouraged to improve guest house capacities, but also through diversification and improvement of other structures such as camping, renting houses, etc.

Regarding the opinion and perception of tourists have for human resources that provide touristic services in the area's responses, they refer to the 4 relevant groupings, and the evaluation (ratings) are given for these above groupings:

- *Level of knowledge for tourism sector*: There is an average perception of this indicator indicating that the level of knowledge for the tourism sector in the response is at considerable levels. This is a key tool for focusing efforts in the future.
- Still lower estimates are for the level of knowledge that human resources have for *foreign languages*. From 0 to 5 the highest share has been rated at 2 this level.
- Sustainable levels of knowledge are above average in *communication*, this is explained by the positive level of communication that accompanies the whole area in general.
- While at the levels of use of *technology*, almost all tourists have concluded very low levels (1).

Thus, *human resources represent low levels of their knowledge in knowledge of technology, foreign languages and knowledge of the tourism sector, while the general level of communication is best presented.*

Fig 12. The opinion for tourism employees' competencies in general in the visited area



The above opinion has been further elaborated, gaining the perception that these human resources which serve in tourism sector or offer other services which impact in creating tourism environment, have more knowledge in general or specific sector services, so opinions are grouped up according to these two classifieds:

- Level of general knowledge on area (history/geography/heritage/nature and environment, etc.)
- Level of specific knowledge (e.g. knowledge of guides for their profession, etc.)

It results that the overall level of knowledge is better and more significant than the level of specific knowledge. This indicates that there is a need/necessity to intervened with or improve the technical/specific levels of knowledge and skills in the tourism sector.

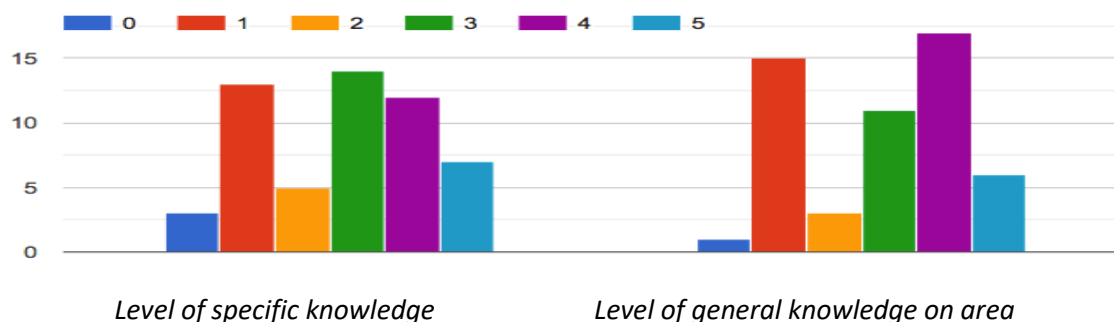


Fig 13 Opinion on knowledge and skills for specific /special services of human resource which serve in tourism sector or offer other services which impact in creating tourism environment.

Below are explained two sets of opinions on the perception of capacity and quality of service:

- Within the accommodation structure
- From other providers of services (travel agents, information points, etc.)

Such a grouping has been made with the argument that services are mainly taken from these two sources, and in order to properly orient the politics of their improvement or the problems they reflect, the opinion is classified by the place where the service is provided. A good part of the perception of the services the tourists receive *within their accommodation unit*. As explained above, one of the rational reasons that the hotel as an accommodation hotel facility is used more than other units, is precisely the perception that more services are offered in the hotel than in a rented house or guest house. Of course, tourists receive and perceive other services from bars or restaurants outside the accommodation unit, beaches, information centers, cultural centers etc. Therefore, in order to locate the perception of the service within the chosen hotel/guest house, a more detailed view of the perception of the level of service was sought.

Again, the grouping is summarized in three levels of services as follows:

- Hospitality:** It is important to emphasize and evaluate the hospitality element within the accommodation unit which is considered evaluate in high rates, which means that tourist is very satisfied by the level of hospitality within the accommodation structure. Tourists have valued the hospitality level, which in fact has also meant the choice of destination to attend.
- Communication skills** are evaluated at medium to high levels. Most of tourists reflected an average level at 3 (from 1 to 5). This shows that communication skills need to be improved and they have to work with them.

3. *Foreign languages.* Situation is even more urgent for foreign languages where the ratings are under average. So, the need to develop and increase the skills in foreign languages in general and those in specific areas of tourism are enormous.

So, as conclusion *an emergency needed to improve capacities and quality of services within accommodation facilities as basic services* such as accommodation, restaurant bar, etc. Emergency needs appear to improve the level of knowledge in foreign languages, following communication skills. While the rating for hospitality remains high. Also, knowledge of human resources needs to be increased within accommodation structures for the area, biodiversity, habitats, birds, wetlands, etc., as according to the opinions of the TO are still at minimal levels.

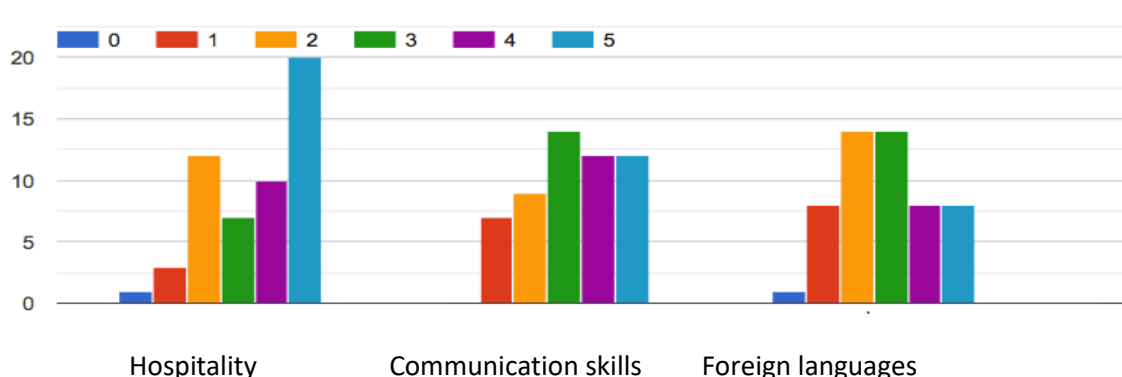


Fig 14 Opinion on service capacities and quality within the accommodation structure

While referring to the same perception, but outside the accommodation structure, the service opinion is mainly referred to as service provided by info points, offices and tourist agencies, municipalities, etc. Again, the level of hospitality results high, being followed by communication skills (with average ratings 3) and foreign languages.

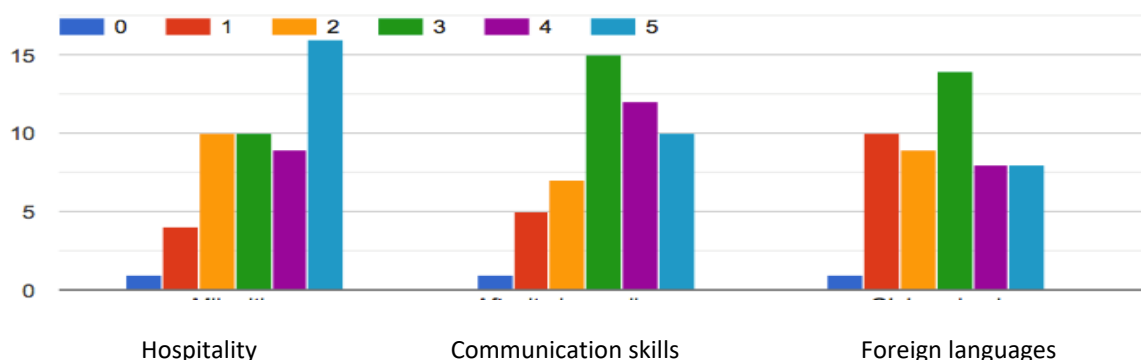


Fig 15 Opinion for capacity and quality of service offering from other service provider during your stay in area: travel agent, general agent, NGO/individuals/universities/municipality/information point/office, etc.

The capacity that tourist operators have to provide tourist services is extensive, and includes a wide range of services. To give an opinion on it should be divided into separate elements and take the opinion for each of them.

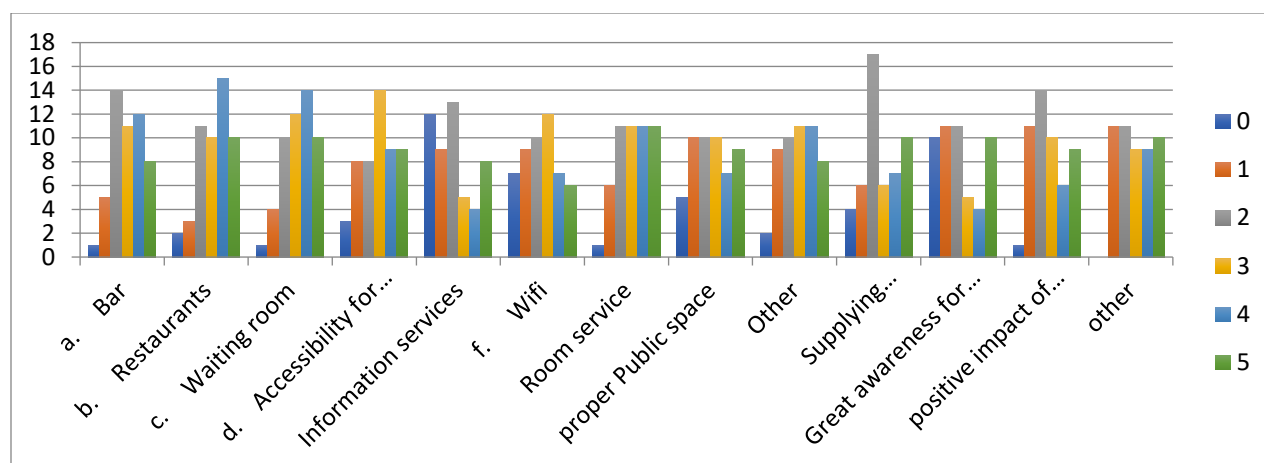


Fig 16 Opinion for tourism operators host capacity in area in offering tourism services

Results show that:

a) for services and awareness referring to: WIFI, room service, public service, environmental awareness, positive tourism impacts on coastal wetlands, perceptions are at moderate levels. This means that there is a need to improve and work hard to improve the performance of these categories of services. Even, it is necessary to work with increasing awareness of the tour operators themselves to the impact their actions have on coastal wetlands in particular and the environment in general.

b) For services: restaurant, bars, information offices, waiting rooms, InfoPoint, perception is above average. Even based on the opinion of the TO, this is due to the fact that bars and restaurants are areas where the service is often offered and has a long-life span, so it has normally come and improved over time. However, these levels of services need to be improved as they are still far from the expectations of tourists.

Further perception of some general ideas on tourism sector management in general is perceived by tourists/visitors. This is realized concepting 4 main topics:

- *General management capabilities of tourism entrepreneurs:* the evaluation for this issue are above the average rate. Also based on the opinions of experts, education system of universities, and tour operators results that it is present a general knowledge in tourism sector. This is related with existing in general a good culture in serving since decades ago, so region is well known for a general culture and communication which make condition for a good serving to tourism. But of course, there are not enough, are still need more specialized capabilities and skills to be competitive in market, to attract more tourists, and to profit competitive advantages for the future;
- *General knowledge on tourism and accommodation sector* are considerable, some specific efforts need to be undertaken regard improving this element in the future and some instruments can be used as it is showed in the next question;
- *Knowledge on environment, sustainability and* its evaluation are directly connected with awareness for environment protection and necessity of evaluation and preserving the coastal wetlands. Even from tour operators, but also it is underlined by tourists/visitors, that one of the main directions/pillars of future guidelines in improvement of tourism services sector is improvement of knowledge on environment, sustainable usage of environment, its evaluation and maintenance;

- *Specific knowledge on languages, guides, qualities services in bar and restaurants, etc.:* the same logic serve even for specific knowledge in specialized guides, qualities services on bar, restaurants and hospitality sector in general, knowledge in foreign languages, etc. Evaluation are considerable and the mostly of tourist underlined taking some specific urgent efforts to improve the situation.

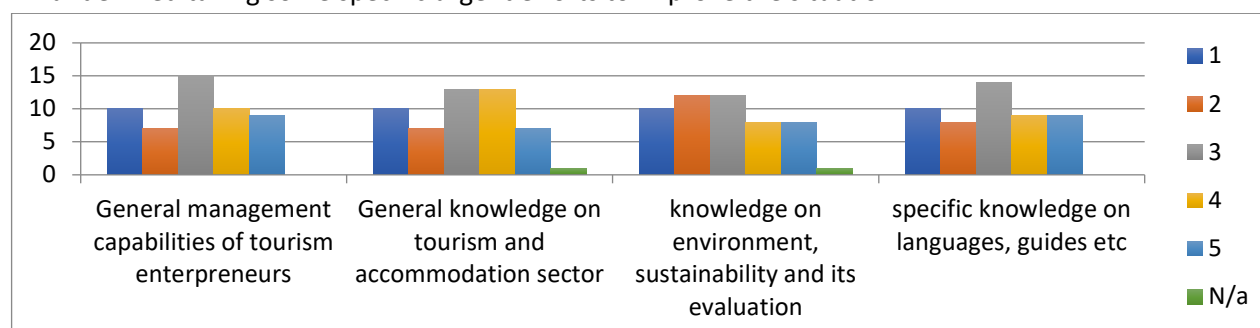


Fig 17 Opinions regarding general and specialized capabilities of the businesses in the area

After having a general idea on the main perception of tourist on general and specific tourism management skills and capabilities even in sector, of for tour operators, a further step intends to have their perceptions on the main ways which can be improved knowledges and skills for those operators in this area. So, there is almost the same perception for the four categories below that strongly orient the emergence of training and *general and specific training courses before starting work, during work, or different forms of internship*. based on the perceptions of specialists in the field, the need for information is not only obtained through general education that can take student levels in universities but need *specialized vocational schools, specialized branches* and profiles in universities, *intensive training*, many specializations and continued:

- more specialized training during the work;
- Intensive training in the before starting a position;
- Specific courses/professional diploma for specific sector of tourism hospitality, guides, etc.;
- Internship in similar other businesses which are success story.

Finally, to conclude this discussion, tourists/visitors have been asked to elaborate and further develop their opinion on what trainings and occupations need more tourism sector to move towards sustainable development.

- First, based on the opinion of tourists, it turned out that the need for courses and professional diplomas is relatively high referring to specialized guides, specialized travel agents and foreign language staff training. There is little need for training for general agents. The same assessment is based on the opinions of technicians and field specialists;
- Secondly, when asked about what knowledge needs more human resources/resources in tourism, the opinions and ratings of tourists again go to the same line as those of field experts: human resources should be equipped with more diplomas and training specialized in the assessment of environmental protection and conservation, and vitalization of the area.

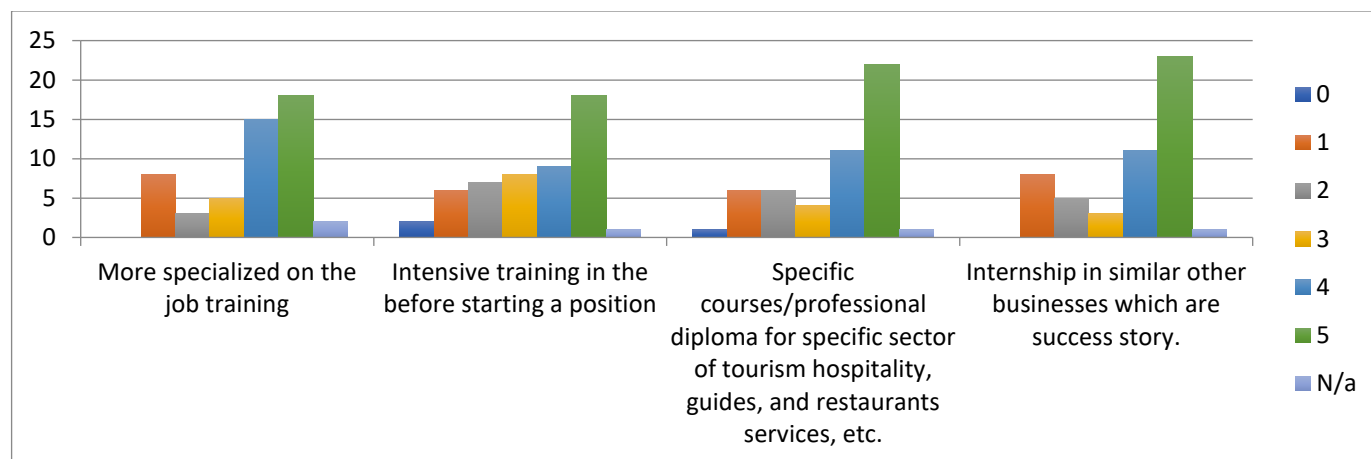


Fig 18. How can be improve knowledges and skills of Tourism Operators in BRVPL area?

c. Analyzing of the impacts of ongoing (and potential) tourism activities on the coastal wetlands and performing a SWOT Analyses of BRVPL

There is a relation between fragile coastal wetlands and tourism activities. Some perception has been gathered and compare between the approach of *community*, *tourism business*, *public sector* and *civil society*.

A. Analyze of qualitative interview with important stakeholders: main problems, impacts of ongoing and potential activities and challenges

This analysis is part of qualitative process and flow from processing of database that was gathered and structured from fourth questionnaire. Is based on perception of important stakeholders on main problems, impacts of ongoing and potential activities, challenges and their expectations of developing of their destination which include BRVPL, so the below analyze will reflect an assessment of important stakeholder that actually have direct impact and are decision taking in local levels, not only in tourism and environment but also can generate policies or strategies for improving the development process of BRVPL. This analyze is organized based on the below structure moments which are part of fourth questionnaire:

- **Perception public/private stakeholders regarding development, impacts, policies, orientations;**

Analysis of the two following moments reflect the approach that have from one side qualitative actors on the importance of the potential of the area, and, on the other side, of the critical attitude they hold for the current ways of development and policies and specially regard to the impact that current potential and ongoing activities are affecting or will have on coastal wetland. Among the moments that provided a unanimous thought and a logical argument, it is based precisely on the opinion and approach of all-important qualitative stakeholders on main impact that the current, potential and ongoing tourism activities *will increase awareness* of rich and important natural resources with high potential for tourism development that needs a careful planning of development and based or respect to the principles of sustainability of tourism development.

The area is of particular importance for the development of agriculture and tourism (not only that of the sun and the beach), which are the most unused sectors in terms of potentials that exist. This area offers about 19 000 ha of

agricultural land, 2-3 thousand ha of forest area, and a permanent population of about 35 000 inhabitants, as well as about 150 000 residents + tourists in three months in the summer.

Although many orientations for the development of the area are provided through the municipality of Shkoder, *there are articulations, but not yet vital actions that protect and activate the potentials* in function of the development of the area. Also, the need for undertaking actions to correctly identify natural resources of tourist interest is urgent in order to draw orientation policies for all stakeholders. Thus, for example, the following elements have been identified and reinforced by the above argumentation:

- ✓ The Buna River together with the wetlands has been subject to spontaneity development for years, which means that there is no attention;
 - ✓ None of the potentials offered by the River Buna are exploited to the benefit of local economies, except in cases of damage to them. In this way, such development does not fit to the principles of sustainable development because it does not serve the community at least from an economic point of view;
 - ✓ *Still are missing the social and environmental profit aspects* of development in order to go through sustainable tourism practices through ongoing activities;
 - ✓ River transportation is totally undeveloped, unplanned fishing and in most cases is hostile to the flora and fauna that accompany it;
 - ✓ The management of the area in general is weak and without perspective for improvement even due to the overlapping of the responsibilities and competencies of other public organizations and structures.
- ***Level of sustainable usage of all the natural, wetlands, ecological, environmental potentials of the area through tourism activities to attract more tourist;***

Of course, every development is based on current potentials and opportunities which produce outputs, and on the other hand results in economic benefits and environmental/social well-being. The area of the river Buna and Velipoja is very little exploited, the resources are misused, there is no diversification of the tourist offer as far as the area is concerned, and, for the moment it all relates only to the sun and beach tourism. It is one of the areas with less investment, but with a careful management can organize different types of activities and a combination of products.

- ✓ ***Level of cooperation between tourism businesses and other stakeholders that have a direct impact and create a climate for the development of tourism in the area;***

Public administration, local government, tour operators, entrepreneurs, local residents, therefore, all actors must cooperate with each other and create an integrated system for assessing the territory in a long-term and objective perspective for environmental, socio-cultural quality and economic. *Awareness* of different actors directly or indirectly linked to tourism activities and sustainable development in the area is *relatively considerable*, and this awareness further seeks and aims towards a collaboration with public levels. So, there has been willingness in this process by all potential actors in the development of tourism, the problem is and still remain the *beginning* and the *sustainability of this cooperation* through the creation of structures (opinion of the municipalities).

The Buna and Velipoja River area carries out and provides income for the community, especially residents, offers opportunities for startup, local economies, businesses, various actors, even for the Shkodra Municipality. But still, cooperation between businesses and other actors remains *unorganized, spontaneous, chaotic*. This form of

cooperation has resulted in tourism activities with significant negative impacts. Some efforts have been made in recent years by the Municipality to guide the way of cooperation with tourism businesses by creating opportunities for such cooperation. For example, public and private sector co-operation with the development of policies for the development of the area has been a result. They remain awaiting their implementation in the territory.

- ***About the development of sustainable tourism in the area - how much are developing those forms of tourism activities and practices that support not only the region's economy, but also social development and preserve the environment?***

Opinions of experts from both the public and private sector or civil society, through qualitative questionnaires encourage and argue that tourism development with low negative impact on the environment such as water sports without the inclusion of motor vehicles, nature hiking, bicycle trails, boat trips, canoe racing, outdoor sports activities, etc.; and, promotion and social inclusion of vulnerable layers. All of these will have an impact on the economy of the BRVPL area, and the development of it based on the principles of sustainability. In the conditions when tourism development is strongly oriented towards the sea and beach development, which can easily be a damage form due to its massive, unplanned and unstable characteristics, it is necessary to undertake a radical reform to change the existing mentality for exhausting resources exploitation, creating the right conditions and favoring the economic-tourist activities that promise and guarantee:

- ✓ sustainable use of resources,
- ✓ diversification of activities,
- ✓ real relief from any obligation,
- ✓ taxes or fees for their activities, since they generate income for their own needs,
- ✓ facilitation for any activity that promotes domestic labor employment, women and people with disabilities.

- ***The impact of the potential and exploitation of tourist activities in coastal wetlands***

Wetlands represent specific features in how they should be exploited, developed and used for the future, but also for orienting challenges for development. Experts' judgment and critical opinions assess that wetlands and other natural potentials in the BRVPL area have been subjected to illegal and inadequate exploitation, and contrary to any standards for the protection and development of these territories. Being specific, sensitive and easily damaging, makes the wetlands not only:

- a. represents *unique potential* for any alternative forms' tourism, but
- b. constitutes *competitive advantages* by directly influencing in the growth of competitiveness not only in the BRVPL, but throughout the Shkodra region. Utilization of wetlands through potential and ongoing activities, as potential for the Buna and Velipoja River area should be carefully planned by assessing step by step their impact on the environment and undertaking appropriate measures if the impact is above the levels that threaten the environment, ecosystems and wetlands. Massive tourism certainly implies incompatibility with the preservation of biodiversity values in the wetlands, and the fact that mass tourism in BRVPL (sun and the sea tourism) has obviously dominated any other form, represent a potential risk to the future of wetlands. Considering the characteristic of tourism activities in the coastal wetlands, they:

- ✓ should be well-planned as mass tourism impairs the area, conflicting with the principles of sustainability;

- ✓ should be developed in this area based on strongly principles of conservation and preservation of the environment.
- ***Critical opinion and some evaluation regarding the capacity of tourist businesses to offer tourism products and services: sun, sea, nature, adventurer, ecotourism, bird watching, etc.***

In the Buna and Velipoja River Protected Landscape dominates, and is well developed sea and sand tourism, but needs to be oriented and planned better, because despite the fact that sun and beach tourism is a massive and non-sustainable form, if managed well this form can be turned into a sustainable form because bring income to the economy of BRVPL and impact directly on the local economy, increase the level of employment, and develops the output of the zone.

On the other side, other types of tourism products are less developed, although there have recently been several efforts to develop these types of tourism, especially those activities which are based on nature. The potentials are large and exist in this area, but also there is a need and some efforts by all actors involved in tourism development. The capacity of tourism operators to offer tourism products has increased recently but it is noteworthy that more work is needed to provide quality tourist services and standards that increase not only the competitiveness of this area, but also the value of the area on the national and international market.

- ***Critical opinion and assessment regarding the knowledge and skills of tourist businesses, for human resources, staff that provide services, services and the support for development of tourism in fragile areas. What knowledge, knowledge, or skills do they need in the future to develop sustainability?***

Tour operators, including all tourist businesses, accommodation structures and those offering other tourism services or services that contribute to the creation of a tourism climate, are characterized by a *lack of knowledge* and, consequently, their *skills*, as well as *other skills are needed for planners, managers and decision makers*. The staffs of these businesses that operate in these areas are really far behind in terms of skills. In fact, it is commonly seen in all Albania the lack of knowledge and skills regard to tourism services.

- ✓ Firstly, is needed the awareness of the BRVPL' s residents, which means the needs to be informed about the benefits they have around them, and their assessment. With all the growing awareness of the indisputable environmental values of the area as well as the potential of this area for tourism development, this awareness remains at low levels;
- ✓ Secondly, there is a need to change the mentality of the residents of the area as well as orientation of the vision of local entrepreneurs for the orientation of economic activities towards the development of tourism with low environmental impacts;
- ✓ Also, there is a need for stimulating policies in relation to different partners to provide specific staff training;
- ✓ And lastly, it is necessary to make it clear to the whole residents of BRVPL the vision for the development of the area.
- ***Assessment on knowledge, skills and capacities that allow for environmentally-friendly tourism activities, and in particular for high-value areas such as BRVPL.***

In order to have a respectful and friendly appreciation or/and evaluation towards the environment, the sense of ownership of the environment should be further developed. The environment is the ultimate source. The tourism industry is particularly concerned that the investments and lands are private, while the state remains the laws and planning issues. Because most of the natural resources are private, and many others expect to have clear property to be protected and developed in continuity. Whole parts can and should be treated as "property" of various communities, interest groups that build long-term relationships with them. Meanwhile, state institutions guarantee respect for the protection and use of resources in a sustainable way.

Education and awareness on environmental quality should be made, in addition to recognizing communities with the environmental right of public participation in decision-making, for all environmental impacts or activities. Thus, special skills for the development of a friendly environment tourism activities are referred first to a high-level awareness of the environmental values of the area. Entrepreneurs and employees should be aware that by preserving the environment they create better quality of life for themselves, their families and the community in general, and secondly, a healthy environment is a prerequisite for sustainable development tourist businesses.

- ***Gaps that stakeholders identify within the actors directly and indirectly dealing with tourism and the environment? What is missing, and what needs to be further developed to have sustainable tourism?***

A stable and permanent consolidate demand is missing. The tour operators act/operate based on demand, and this demand reflect elastic attributes, meanwhile the tourism supply is inelastic and cannot change every time that demand is changing. So, tour operators in BRVPL need to know exactly which will be the demand in advance in order to plan and manage their offer, and to fit this with their potentials. This is accompanied by missing of the following attributes of region as well:

- sustainable stability;
- the country enjoys full integration with the countries of the region and;
- public security will be guaranteed;
- while a much more fruitful regional cross-border cooperation is required than now, as well as;
- domestic products guaranteed in quality, size and timing.

B. Analysis of the main factors that condition and inhibit the development

Tourism in protected landscape is considerable *new form of tourism* which globally is very well known. The creation of a genuine tourism in protected areas based entirely on the diversification of the potentials offered by the respective area constitutes a challenge. This especially requires the provision of tour operators with the right and specialized services according to the services and tourist products they offer, the adaptation of the tourist products according to the trends that are taking place in the world, etc. The impact of potential tourism activities has been accompanied with several problems identified from, both in the form of weaknesses and threats, and include a wide range from of community awareness (photography not used, low volume discussions, adherence to multiplication periods of different species, etc.), the need for capacities that produce operators and specialized tour guides, the need for tour operators' networking and networking, to the emerging needs of services, marketing and marking of destinations, local products, the use of technology or the teaching of curricula to specialized professions wants and needs market. Even the community in the BRVPL area is not optimistic relate to the actual development and the way

that private or public government has undertaken their actions, the *existence of protected areas serves as an instrument of protection, positive development, and orientation for future development*. Private operators consider three protected areas as a tool which will lead local/national leadership towards a suitable macroeconomic policy which will be followed by economic/environmental/social profitability for whole community living in those areas.

Tourism in protected areas should have its own management, management and operation instruments, which means that by its specialized and certified guides, its specific development policy, the use of natural resources and wetlands within it, and so on. In this way, this protected area will serve as a good example for other areas or tourism and sustainable development in general, and thus to be a *viable practice of sustainable development*.

Relate to *the role of Civic society/Ngo/association/group of interest as a potential and Opportunity for challenges of development in BRVPL*, what was strongly identified and observed in every meeting with individuals or groups, meetings or questionnaires, was precisely the strong role that civil society is supposed to have, despite the lack of proper development. This group has been subjected to *individual interviews* that have often involved more extensive and specific questions and discussions than those included in questionnaire 4. This analyze was based and summarized on individual meeting with important technical stakeholders and civic society. When is mention civic society of NGO, will refer, include the following:

- NGO in tourism, environment and other related that impact or create a proper clime in tourism;
- Associations;
- Individuals (public/private persons which sometimes has not an important duty in public sector but they have a long time in the sector or are include in other private concerning activities). They are considered important analysts in the region;
- Guides (sometimes their opinions are very crucial and a critical statement against the public approach.

From all the above stakeholders in all the individual or other meetings, it is realized that they can be considered as main key source of opportunity for development in the future of BRVPL (in the SWOT analyze). So, after natural resources, this group is considered the potential resource for opportunity section within the SWOT analyze.

From NGO/civic society there is an awareness regard to tourism and environment issues. Main problems and challenges emerge from this sector and individual public/private persons which are key persons in tourism sector in BRVPL. Although some of them are focusing and indexing in forests, rural development, etc., they consider and:

- a. Treat tourism and environment as key factors for further development of area;
- b. Underline the lack of collaboration with other NGO/association in the countries close to the borders as Montenegro or Kosovo as a future challenge that will further sustain the sustainable development;
- c. Consider interdisciplinary functioning as very crucial for the development of area;
- d. Tourism in BRVPL area should be treating as multiplying tourism offer, which means based on cultural tourism, natural based tourism as water sports, birdwatching or mountain development, ecological tourism, and business tourism;

Civic society is looking for a sustain effort and approach to create an association/**alliance** between farmers, specialized guides, etc., even with municipality regard to specific issues as well as regard to tourist signaling, etc. There is an effort named Alpine Alliance which try to integrate local NGOs and to put collaboration with farmers etc.,

but still is missing the creation of a suitable approach that make them strong and effective in sector. Also, there are some regional cooperation like rural Balkan development with center in Skopje, Makedonia which has worked on strategy for action till 2012 but those and other strategies do not include Shkodra Region (we refer to this since include even BRVPL area), and do not have impact on area. Also, regard to tourism offer (stakeholders) and their participation in these alliances, should have an awareness from guest houses to be include and develop those alliances as a tool for further development in BRVPL area.

Civic society can easily orient the reforms/ways/process of development. So, one of the main findings from all focus group and/or even from individual meeting is related to necessity to create a **base of knowledge effort** compose by a selected list of persons/individuals which belongs to different public and private sectors, but has one general and important thing in common: has been involved by decades in tourism issues related. Here can be include: freelancer, individual (technical/specialist) from municipality or district, fishing public entities, etc. This group should be selected based on a *broad selection base* and will refer as important and focal point for every process in the future.

What is easily noted is related to the fact that there is a missing of certified identification/evaluation of potential, an assessment of paths of development and the role of each actors, etc. This change every time that election will happened and also is related with the often movement of people from technical posts, which means that the public sector in BRVPL has **a lack of current specialists** in fishing, environment, tourism, etc.

C.Summarize of main impacts of ongoing (and potential) tourism activities on the coastal wetlands and SWOT analyze

Regard to impact of tourist activities (potential and ongoing) on coastal wetlands, experts' judgment and critical opinions assess that wetlands and other natural potentials in the BRVPL area have been subjected to illegal and inadequate exploitation, and contrary to any standards for the protection and development of these territories. Massive tourism activities certainly have implied incompatibility with the preservation of biodiversity values in the coastal wetlands, and the fact that mass tourism in BRVPL (sun and the sea tourism) has obviously dominated any other form, represent a potential risk to the future of wetlands. Based on the three structured qualified above analyses, in general it can be assumed that the potential and ongoing tourism activities mainly have had not a considerable and measurable good impact on the coastal wetlands, making BRVPL an area which still is: very little exploited, the resources are misused, there is no diversification of the tourist offer as far as the area is concerned, and for the moment it all relates only to the sun and beach tourism and some efforts to include other forms as cultural, natural based activities, fishing, walking, bird watching, etc.

Till now the tourism sector in general has been unplanned, not organized, not environment respectfully, has not been given the right attention tourism either by improving education in tourist services, encouraging investments to develop and diversify the tourist offer and to grow the capabilities has been missing, taxes are still relatively high compared to the region, potential tourism activities does not have offers opportunities for startup creation or new venture in tourism sector.

Tourism activities have been individual, often associated with the lack of a marketing to guide and chronologize these activities. Consequently, this unplanned individual, not professionally managed, with short-term goals and benefits, without thinking about the consequences that have damaged the environment and reduced the season's time, have

resulted in very low economic benefits, and especially on increase of employment for youth and women. The up-to-date development of tourist activities has failed to promote all the products and potentials that the area really offers. Tourism activities, especially those that have been developed in recent years, have not been a strong and convincing reason or instrument (as often qualified by local and central levels) to attract the return of young people living in emigration, but more young people (including those with higher education) seek to leave the country. Also, the impact of potential tourism activities has been accompanied with several problems identified from, both in the form of weaknesses and threats, and include a wide range from of:

- community awareness (photography in specific and delicate areas within BRVPL are used, high volume discussions, adherence to multiplication periods of different species is not respected, etc.);
- *garbage and impurities* caused by tourism activities on the coastal wetlands are considered important obstructing aspect in the near future development and plans;
- *greening issues*. Protected areas in whole Shkodra Region have a very important role not only for the potential they pose as a possibility of returning them to tourism areas but also for the direct impact they have in other areas. It is noted and identified that due to tourism activities all these years, the River Buna has a lot of impurity, no tree and greenery are noticed along it.

But, beyond the current negative impacts that in most cases have had the tourism potential activities in BRVPL area, the three analyzes demonstrate that due to the assessments of even the negative impacts, the ongoing activities have had and especially will have positive impacts on all levels, since from decision taking institutions/individuals, civic society, NGO/association and the community themselves, as follows:

- *Growth of awareness* on rich and important existing natural resources with high potential for tourism development that needs a careful planning of development and will be based or respect to the principles of sustainability of tourism development;
- This is accompanying by a strong necessity to *undertake vital actions* that *protect and activate the potentials* in function of the development of the area;
- Need for undertaking actions to correctly identify natural resources of tourist interest is urgent in order to draw orientation policies for all stakeholders;
- Tourism activities that are developed based on potentials offered by the River Buna *are not exploited to the benefit of local economies*, except in cases of damage to them. Some economical perceptions have been identified but is a very short time due to high level of seasonality that still tourism activities do still have;
- *Still are missing the social and environmental profit aspects* of development in order to go through sustainable tourism practices through ongoing activities;
- Tourism ongoing activities, especially the future challenges based even in growth of awareness, will orient some local policies to give the right attention to: installing river transportation, a planned fishing in a good harmony with flora and fauna that accompany it;
- The negative developments that have been caused due to inadequate management of tourism activities in order to create sustainable practices are associated with the early creation of an urgent need for improvements in terms of *knowledge and skills in tourism*, growth and development of *professions, guides and technicians* in the tourism sector, *planned growth and well managed tourism capacities* based on real potential, emergency need of *measurements and periodic quantitative assessments*;

- The need for tour operators' networking and networking concept in general, to the emerging needs of services, marketing and marking of destinations, local products, the use of technology, usage of foreign languages;
- *A new perception of Infrastructure*, which means that based on potential for ongoing activities and tourism products, the tourism investment on infrastructure should be orient to agritourism infrastructures as well as tourism capacities with higher room number, accessible facilitates and some certifications and standardization elements to be include. Tour operators say that in the summer season the demand for accommodation structures sometimes included large international groups of over 80 rooms. But the lack of such structures has created difficulties in hosting or distributing them. This means that the existence of some typical activities should now orient how private tourism entrepreneurs build their tourism hospitality capacities.
- Tourism potential and further ongoing activities has come out gradually with a necessity *for food safety and certification of local foods*.

Performing a SWOT analyzes of BRVPL. The analysis of the strong points of the protected area of the BRVPL area aimed to identify those elements that enable a better marketing at national and international levels. Tour operators, individuals, experts from different fields, academics, students, tourism service businesses and those products/services that influence the creation of a climate for tourism (agriculture, livestock, fishing, etc.) need to identify those elements of the tourist product that they offer and represent the unique value represented in the market, to the tourists, to the national and international tourist requirements.

Private sector actors consider their region as:

- a. High value potential for environmental awareness, and
- b. economic profit in the future for the future, but
- c. A strategic tool for attracting younger generations who have emigrated to different parts of the world, and to give them a strong reason to return and develop the country.

What is the role and existence of wetlands in SWOT analysis? From qualitative analysis with important actors concludes that wetlands and their existence are a strong element in SWOT analysis. Being specific, sensitive and easily damaging, makes the wetlands not only to make unique potential for any kind of tourism, but, constitutes competitive advantages by directly influencing the growth of competitiveness not only in the Buna River area, but throughout the Shkodra region. In particular cases of wetlands existence, it was considered a possibility of how strong a point because the exploitation of wetlands as potential for the Bune and Velipoje river area should be carefully planned by assessing step by step their impact on the environment as well as by taking appropriate measures if the impact is above levels that threaten the environment, ecosystems and wetlands.

Strength:

Geographical position;
Multiply tourism offer, which means based on cultural tourism, natural based tourism, ecological tourism and business tourism;

Weakness:

Lack of co-operation between various and many actors;
 Lack of awareness of tourism offer sector (guest houses) to be included in networking or whatever form of collaboration within stakeholders;

Hospitality, values, customs and traditions constitute the basic spiritual and cultural potential upon which the resort product is perceived and the values of itineraries are built and attributes of habits are established. It is identified a community awareness living in this area, at all ages, and perceived as an added value. It also comes as an emergency need to identify a union of those values that identify the area and perceive it as a unique value proposed to make destination marketing;

Cultural heritage, churches, mosques, characteristic houses;

Intangible sources of culture and tradition;

Civil society awareness in considerable values;

Good accessibility - proximity to a part of the Balkan countries, which enables not only the strategic orderliness of the region as a transitional zone but also supports and strengthens the access of integrated products / routes to neighboring countries. For example, the development and promotion of the Buna River support comes precisely because of this affinity;

A tangible asset and wealth in farm and arboriculture business;

Variety of Agricultural Cultures;

There is recognition of destination by tourists and agents;

Being a protected area gives priority to status and development;

Local events;

Presence of traditional houses;

Cooking and many products;

Good social-cultural organization of the traditional village.

Changing the travel format has reduce the total number of overnight staying in BRVPL area since they organize group tours which include whole Balkan or whole Albania in a single trip.

The creation of waste infrastructure for wetland areas is still problematic. The *capacity building to manage* the entire area *is missing* and needs to *be raised*

garbage and impurities

lack of public transport

lack of movement of navigation transportation

lack of a general tourism management

Lack of cooperation between the public sector, banks and tour operators

Lack of measurable effective sustainable plans

food safety and certification of local foods

Inadequate tourism education system

Promotion of area is not organizing and well manage

- a) participation of tour operators at regular regional annual fairs,
- b) lack of promotion of cultural and heritage values through both individual operators and local levels for regional or European markets,
- c) the lack of organized destination marketing for the whole region by identifying the main values and elements of the tourism product,
- d) lack of a combination of coastal tourism with mountain or cultural tourism,
- e) promotion through websites in European and wider countries.

Lack of exploitation of potentials, combining in one single unique product different products as agritourism nature and environment tourism and wealth tourism.

- There is no incentive to create start up, new venture or small and medium enterprise in tourism sector
- education in general but also in the relevant area (whether at university or professional level) still has no orientation towards appropriate subjects and modules that have potential in the area.
- Lack of the concept of cross-border.

Do not participate in regional fairs

Lack of maintenance of heritage objects

Low presence of social life in the rural area (Velipoje)

Infrastructure issues

There is a shortage of tourist accommodation for tourists

Lack of co-ordination of efforts between different public and private actors to a new approach based on networking and relying on the community and its values

Sewage sludge

Electric energy

Opportunities:

- Possibility of networking between similar international (border countries) civil society and those in BRVPL area.
- There is a tendency to create alliance within some NGO
- *Tourism offer should be sustained by technology.* So, different *application* should be encouraging in order that tourists knows in advance which farms produce pomegranate, which farmer provides livestock, etc.;
- Growth of the tourism market in the surrounding destinations;
- Planning of infrastructure interventions. There is national project managed by prime ministry called 100 villages, and several villages of this area are included in this project. This means that will be some planes and implementation of restorations of historical and cultural objects and interventions in the vitality of life in the villages of the region;
- Possibility to organize and manage area through idea of a village center in the existing space
- Opportunities for growing demand, tourist flows (Tourism in Montenegro, Delta Buna or some part of Buna belong to neighboring;
- Market opportunities for selling domestic village products and rural areas: livestock products, olive oil products, grape raisins, various liqueurs, handmade, artisans, etc.;
- Increasing demand from visitors for culinary products and tasting, and BRVPL is very well know regard this type, so there will be possibility to development of the culinary tourism market
- Opportunity to invest in hostels / tourist farms, by residents of the area that are in migration
- Fairs of neighboring countries for regional tourism

Threats:

The public sector in BRVPL has a lack of current specialists in fishing, environment, tourism, etc.

Missing of specialized guides and Low specification regard to the guide tour issues laws and policies

Uncapable and politized public administration

Lack of capabilities

Lack of marketing of destination and lack of using of an integrated marketing plan which include: branding, social media, promotion, entrepreneurial incentives in tourism and agriculture, etc.

Floods are threats for whole area because diminish the possibility of tourism season extension

the lack of standardization and certification of tourism services

Lacking of booking system and other technological infrastructure supporting tourism supply system.

Exploitation of resources that has BRVPL area, wetlands, lagoon of Vilun, etc. is still at almost minimal levels.

Demographic problems with population decline

5. Gaps in knowledge, skills and capacities of Tourism Operators

The purpose of this study is, in addition to analyzing the current tourism situation for the BRVPL area, but also identifying gaps that do not sustain development and refer to shortages/needs for more knowledge, skills and capabilities. Knowledge based strategies will serve as initial positive path towards the sustainable practices. Identifying the main gaps and needs and orienting the main strategies to fill those gaps will serve for further generating new knowledge, capacities of protected area managers and resource users. Capacity development should be treating as a process which must include also civil society, local communities and the private sector. Knowledge and capacity building activities will focus on the following topics: wetland conservation and habitat management, ecosystem services, sustainable land use practices, good governance and rights-based approaches, and transboundary cooperation, conservation and sustainable use of resources. In this last part of the report, gaps in knowledge, skills and capacities of tourism operators, including the ones in relation with sustainable use of natural resources and in particular wetlands, will be identified for BRVPL. The identification will be done through the following steps:

- A. Elaboration of questionnaires and their dissemination among tourism operators, experts, technical level and other relevant stakeholders in BRVPL with the aim to identify gaps in knowledge, skills and capacities of tourism operators (part 5.1.);
- B. Identification of knowledge, skills and capacities needed to allowing for environmentally friendly tourism and in particular for highly valuable areas such as BRVPL (part 5.2), for each gap are identified and explained in detail one or more strategies/aproach to fulfilled the gaps/needs;
- C. Gap analysis and needs assessment of the knowledge, skills and capacities of tourism operators will be based and summarized based on two main sources of opinion and analyses:
 1. the synthesis of the needs and disadvantages will be based on their identification by *field experts and opinions, decision makers at local and central public levels, private sector leaders* in the BRVPL area, etc.;
 2. Identify gaps and shortages based on demand and supply analysis.

In particular, the assessment of skills, knowledge, capacities needs are realized in parallel by analyzing, observing and summarizing as perceptions of tourists and visitors (from the questionnaire), as well as tour operators (from the offer questionnaire). After confrontation the perception of the same needs/gap but of two different sources, this perception will be summarized in a table together with the proper strategies, and included in this study as inferred from the analysis conducted through the study to identify and evaluate shortages and gaps.

Tour operators, including all tourist businesses, accommodation structures and those offering other tourism services or services that contribute to the creation of a tourism climate, are characterized by a lack of knowledge and, consequently, their skills, as well as other skills are needed for planners, managers and decision makers. The staffs of these businesses that operate in these areas are really far behind in terms of skills. In fact, it is commonly seen in all Albania the lack of knowledge and skills regard to tourism services. Which is knowledge, skills and capacities that allow for environmentally-friendly tourism activities and in particular for high-value areas such as BRVPL? Education and awareness on environmental quality should be made, in addition to recognizing communities with the environmental right of public participation in decision-making, for all environmental impacts or activities. Thus, special skills for the development of a friendly environment tourism activity are referred first to a high-level awareness of the environmental values of the area. Entrepreneurs and employees should be aware that by preserving

the environment they create better quality of life for themselves, their families and the community in general, and secondly, a healthy environment is a prerequisite for sustainable development tourist businesses.

5.1. The synthesis of the needs and gaps based on the identification by field experts and opinions, decision makers at local and central public levels, private sector

The synthesis is done based on elaboration of questionnaires and their dissemination among tourism operators, experts and other relevant stakeholders in BRVPL with the aim to identify gaps in knowledge, skills and capacities of tourism operators. Also, qualitative interview with important stakeholders in the area and focus group meeting with the aim of identifying main gaps and needs conclude the following summarize report from this category of stakeholders. A general situation of what is missing and what can be suggest is included in the following analyze, but in detail for each gap will be go through the second part (part B).

In general, as a summarization of whole situation, refer to the gaps that stakeholders identify within the actors directly and indirectly dealing with tourism and the environment, to what is missing, and what needs to be further developed to have sustainable tourism, it is conclude that a *sustainable and permanent consolidate demand is missing*. The tour operators act/operate based on demand, and this demand reflect elastic attributes, meanwhile the tourism supply is inelastic and cannot change every time that demand is changing. So, tour operators in BRVPL need to know exactly which will be the demand in advance in order to plan and manage their offer, and to fit this with their potentials. Tourist policies are very important factors affecting all the actors of the tourism industry. Measures should be taken to improve and enhance tourism-friendly policies. The development of agritourism or of activities that are supported in nature would be a good initial orientation for this area.

Based on expert opinion, public entities, decision taking individuals in private and public sector, some of GAPs related to non-functioning and regular process is related to the following. For each of them is explain a strategy that can fill gaps, showing what is missing and what can be done:

1. *There is a need of specialized guides.* There are knowledge person/individuals but not certified guides, or are missing profiles guides, so those guides which are experts only for flora, fauna, birds, and rare animals that BRVPL area has as potential. Especially should be analyzed which are based tourism products that BRVPL area offer and based on this should develop typologies of guides in order to specialize those, especially for natural and cultural tourism. The state has established the law for tourist guides but has not sold the school and the standard of delivery.;
2. It is identifying a low specification regard to the *guide tour issues laws and policies*. Sometimes tour packages are accompanied by international guides or guides from Tirana. This will be shrinking the need for guide tour demand in the area of BRVPL;
3. *Incapable and politized public administration;*
4. *Needs of capabilities* to manage and marketing of destination even in public and higher level also in low profile as everyday services;
5. *Changing the travel format* has had negative impacts on the area. So, for example, for several recent years, international tourists prefer to visit the Balkans or parts of it on a single trip. This *has reduced the number of days* that these tourists stay in the BRVPL area, making it to a maximum of 2 nights. Or, sometimes in a single trip is offered whole Albania in a package, for example in maximum 15 days a small group visit whole Albania. All this will and should be related to marketing issues: as for example there is an urgent necessity to orientate the policies towards the key terms as: brand, marketing, destination, sustainability, education, knowledge, skills;
6. The missing of *concept of diversification*: Can be stimulating *folk tours* especially in those periods when tourism season is off, for example in autumn or spring when grapes or special fruits are harvested. For BRVPL areas this could

expand the season, increase the number of tourists, and increase local product purchases by boosting investment in these products in the coming years, but also stimulating other products;

7. Also, significantly there is a *missing need of exploitation of potentials*, e.g. combining in one single unique product: agritourism which has started to be tangible, with the environment (nature-based activities) and the exploitation of wetlands, together with health tourism. Therefore, tourists can use systems that provide agritourism but use basic tourism products as of health and environment (nature, walking, etc.). In this way tourists/visitors are encouraging to consume and combine three tourism products, meanwhile are utilizing the environment, local products and values and massive appreciation.
8. *Tourism offer should be sustained by technology*. So, different *application* should be encouraging in order that tourists know in advance which farms produce pomegranate, which farmer provides livestock, etc.;
9. The *business responsibilities of tourists should increase*. The people/community who serves in the tourism industry currently does and offers the services basically due to the hospitality elements. They should increase their skills and encourage social and economic development in rural areas. Businesses should also be stimulated with knowledge of how to use homes for tourism, and in this way the inclusion of *women and youth* is also encouraged;
10. The creation of *waste infrastructure* for wetland areas is still problematic;
11. The *capacity building to manage* the entire area *is missing* and *needs to be raised*. On the other hand, tourists themselves should behave in a sustainable way to raise awareness amongst young people as well.

Also, this process of identifying the needs and main gaps, based on expert opinions should be follow by some strategies as by *reinforcing some existing concept* which for the moment may be in elementary forms, as:

- *Concept of familiar tourism in unique* in BRVPL area and this will reinforce in a very sustainable way. Although there is huge potential for this form of tourism offer, the development of this concept *should go beyond* this for reasons as well as it further develops and stimulates the elements of hospitality by improving the social elements through the development of tourism; so, people/community are in everyday contacts with cultures, nations, foreign languages, perceptions, etc., and at the end this will end up with social, economic development and environmental awareness;
- *Concept of agritourism* should be *extended* and serve as a *challenge for rural development* in whole BRVPL area in the near future. So, for example, each village has identified at least 10 houses that can be offer and served for tourism. This is also stimulated by the fact that the *land is in good shape to work* in those cases where there is no incentive to work; *houses have good infrastructure* and are suitable for tourists; the *hospitality elements are considerable and no missing*;
- *The concept of Production* in tourism in BRVPL area *should considered as a chain* from which can be produce only values for each actor include in it.

In order to fill the gaps and needs on whole Shkodra region, include BRVPL cannot be orient in one single path of development or one single strategy. For example, a summary of some suggestion strategies to fill the gaps and needs, which include the development of whole region based on some of main principles of sustainable tourism management are as follows:

- A process which focus and work based on a **networking**. The idea of networking through at least civic society, which is the most sensitive part of society for the future challenges, is a sustainable and considerable base to grow and start the development and way of thinking.
- A process which should transmitted and consider the **public private partnership** principle (formula) in whole system, which mean not only in implementation of concrete projects from the government or public local sector, but also in developing ideas, projects, plans, strategies, etc. This must be a detailed, monitored and ongoing process.

- A process which should be **comprehensive** and all-inclusive approach, which mean that the process will guarantee the inclusion of all nominated individuals/NGO/association and whole civil society.

5.2. Identification of knowledge, skills and capacities needed to allowing for environmentally friendly tourism

Identifying the train needs, skills and capacities gaps is considering a challenge for whole community, public and private sector in Buna River Velipoje Protected Areas. Tourism and hospitality fall under the category of labour-intensive industries. Therefore, more jobs can be created if a nation puts in place appropriate strategies to develop tourism as one of the economic activities. This study not only provides the conceptual analysis in identifying and addressing the training needs and skills gaps, while focusing on implementing sustainable tourism activities in BRVPL wetland, but it underlines the importance of undertaking a regular updated data on skills and knowledge demand and supply issues in view to facilitate policy makers and other stakeholders to frame policies and strategies towards development of human capital in the key sectors. Always, the essence of good service is peoples' skills; and the availability of quality workforce is an integral part of successful economic development. Hence, regular undertaking of the current and forecasting future train needs enables the proper planning in terms of curricula development and review and establishment of suitable skills development policies, facilities and action plans. This eventually feeds into appropriate assessment of economic potential and market opportunities and the identification of underlying constraints and later, addressing employment-related issues.

Economic transformation demands a healthy workforce equipped with the knowledge and skills to be highly productive in the workplace and to generate innovations in technologies, processes, products, and services. All this should be estimated under the potential of capacities that tour operators has in offering products, services, hospitality and all the tourism bundle supply.

5.2.1. Introduction and methodology

The conducted analysis through the study identified approximately the same gaps in skills/knowledge/trainings as the ones introduced in the first part of the conducted study in relation to the needs and the tendencies of tourism in Europe. These huge gaps in certain trainings and capacities in Europe have resulted in the identification of these general needs in the tourism sector, but more or less in the BRVPL there are introduced the same gaps.

The strategies for the completion of the above mentioned gaps are related and joined not only to the undertaking of trainings, courses, certifications, professional skills and the orientation of knowledge etc., related to the general and specific skills/knowledge/trainings, but they are also referred to the realization of a **new vision** which is related to:

The need for a change and orientation to a new education relate to the new and existing entrepreneurs, to the technical and professional levels in the sector of tourism, which should be related to and orient the formation, awareness, training and certification of their knowledge toward well usage the sources, potentials and assets of the area to good use, with the intention of achieving and enabling the development practices which not only improve the economic prosperity, but also increase and empower the social welfare whilst taking care of, maintaining and putting to good use the environment, wetlands, flora and fauna, animals and rare species, etc., so sustainable tourism practices.

The completion of this vision needs the emergent realization of a network which:

- Will be based in all the levels and forms of education, so it should include all the tuition levels directly related to the sector (elementary schools, high schools and professional ones, universities, etc.);
- Should include modules/courses/subjects which aim the overall informing, awareness and specific skills (according to the levels) related to communication, environment, tourism, marketing, technology, services, local history and cultural assets;
- Will be accomplished with the support and collaboration of the well-known and certified national and international institutions as well as with the consultation to the local levels;
- Will be accomplished with the inclusion of the all targeted groups of the tour operators, starting with the ones who have a direct impact to those who with their activities improve the perception regarding tourism development;
- Will be accomplished including the public and private sector, the high management levels for general knowledge and the technical levels in direct and indirect contact with the consumers for general and specific knowledge/trainings/capacities according to certain needs.

The final aim consists in tour operators (TO) creating the right structures and the *accommodation capacities* to welcome tourists (target markets), to raise the *operators' awareness* in diversifying their packages, to enlarge *the education of human resources* regarding these products not only in *knowledge*, but also in the *capacities* to serve in *special skills*.

The presence of the gap in general and specific knowledge, disoriented regarding the market needs, often happen to be the main sources for the gap of qualitative services. There is a need for undertaking a *General Strategy of Education and of Specific Knowledge* which should have as a vision the offering of an inclusive education (in all the levels of education), consulted between all stakeholders, who through the reflection of the local needs of the BRVPL area, national priorities and international orientations, should aim to support businesses in the realization of sustainable tourism practices, leading the whole region towards sustainable development.

The whole analysis of the study will be followed by the efforts to orient tourism development activities in the BRVPL towards the *sustainable development practices*, and also their orientation towards *new tourism-friendly patterns* that respect the environment, wetlands, flora and fauna, but also bring economic and social benefits to the area.

The gap analysis will generally follow a series of steps as follows:

1. The identification of the gap like the ones in the analysis of both supply and demand will be based and compared with the analysis of tour operators' perceptions. Thus, beside the qualitative analysis from the interviews, focus groups, perceptions of NGOs/individuals or other stakeholders, will be strengthened and ratified through a detailed analysis of specifications resulting from the data of the *demand questionnaire*;
2. Then it will be faced and analyzed in parallel with:
 - a) What the supply suggestion offers (taken again not only by the perception of tour operators through qualitative meetings, but also by the tourism *supply questionnaires*).
 - b) The tendencies and developments in Europe.
3. It should be emphasized that after the identification of the needs and gap treated in the analysis of demand, supply and experts, they were redistributed to a selected group in order to give their opinions about the methods and strategies that might serve to fill this gap. For this purpose, a *qualitative questionnaire* was drafted which contained listed all the gaps and for each of them an opinion was asked. Meanwhile this group was allowed to add other identified gaps;
4. In this way there will be an analysis on the confrontation between what is required and what is offered resulting in the lack of development, perception, evaluation etc.;

5. Furthermore, on the basis of the detailed list of the identified gaps, will be offered some suggestions classified in groups of emergency interventions or best strategies that can be undertaken.

5.2.2. The identification and analysis of GAP: The Strategy/ Approach to meet the GAP

GAP 1. The TO's perception in the area and the need for orientation from the local and central public levels

The fact that TO in general estimates moderately positive incoming flows and is optimistic about the growth of these flows in the future, compose a *supportive and important factor* to be considered by the local and central policymakers. This is an indicator of an *awareness and general attitude of the business community* regarding tourism in the whole area. On one hand, according to *the capacities of the structures, the tendency of the average upcoming flux is positive. This shows that starting from 2019 more tourist flux will visit the area, so tour operators should be prepared for much more tourist flows.*

On the other hand, this faces with the need of an awareness achievement from decision makers, policymakers over these levels. This because in order to give an answer to the perception that operators have regarding the future of tourism development in their area, there *is the need of having the same positive, supportive and orienting attitude from the public levels.* Meanwhile the local public levels are not so supportive and helpful to local tour operators. Something which cannot be said regarding the central government which actually in the last year has given special attention to tourism as a vital factor to the Albanian economy prioritizing it. However, it is worth mentioning that the orientation from the tendencies and international development is distant and very little present. This way, for example, the year 2019 is considered from UNWTO as the year of knowledge, skills and of the creation of work in tourism, and that is not reflected in the local and central Albanian policies yet.

The suggested attitude/approach is related to the fact that: the state and local governments should orientate their tourism development policies towards the needs resulting from the gaps, the existence of potential, the international orientation and the immediate local priorities. Over a positive approach and tour operators' awareness over the growth of tourism in the future, decision making levels should be more supportive and characterized from a proactive attitude. Because of the strong international tendencies and 2019 being defined as the year of the educational skills and knowledge, the local and central governments should make businesses/ levels of education, aware of qualitative, professional education, the development of professions in tourism etc.

Gap 2. The need for the growth of tourism capacity use and the change of seasonality

Regarding *the quality and composition* of the incoming flow in the BRVPL area, results that, *on one hand* it is noticed that:

- There is a positive growth of the number of Albanian tourists from within the country who visit the area (+3) and it is evaluated with 40.9 %;
- There is a considerable and normal age distribution, starting from the youth to the elderly (so there isn't only a group of tourists or a small market segment);
- The distribution of national flows covers the whole country; there is an equal attendance from every part of the country. This shows a positive national evaluation for the BRVPL;
- The frequency of the attendance is an optimistic indicator (nearly half of the interviewees have visited the area formerly);

- There is a positive tendency and growth regarding the foreign flows.

One the other hand:

- There is a low evaluation regarding the occupation capacities levels: 50% are occupied in summertime, 20% in spring and so on in autumn and less than 10% in winter. This reflects not only the high level of seasonality but also the fact that these capacities are not used in a good way during the tourist season;
- The identified gap is related to a bad distribution of the tourism flows during the year in the accommodation facilities, giving focus only to the tourist season, and eventually not making the best out of accommodation structure;
- The experts connect these facts even with weak marketing strategies for the destination, with the lack of knowledge, low level of services and foreign languages, personal skills etc.

As a result of not using the tourism capacities, there is a direct effect on the increasing of seasonality. Eventually, these two indicators are closely associated with each other. High seasonality, meaning tourism giving focus only to summertime, is a low indicator of the development level of the tourism activities. On the other hand, the foreigners` (and also Albanians`) preferences for some tourism products such as nature activities, history and culinary, may and must serve as indicator to decrease seasonality. So, one of the reasons why TO should focus on taking precautions, is to decrease seasonality. The decrease of seasonality provides the distribution of prosperity and wellbeing during the year, increases the value and importance of tourism related jobs, and helps in bringing the youth back in their nation.

In order to optimize the two above indicators: seasonality and capacities use, there is a need to undertake a certain strategic attitude to increase the use of capacities, the distribution of the flows during the whole year, the increasing of the offered supply, the awareness and education of the community and tour operators regarding the assets and potentials of the area.

Gap 3. The gap of sustainable utilization of the all-natural, ecological potentials, wetlands, of the area through tourist activities

Every development is certainly based on current possibilities and potentials which produce output, and also result in economic profit and environmental and social welfare. As for the sustainable tourism development in the area – it is identified a gap of the development of those types of tourism which support not only the economy of the area, but also the social development and environment maintenance. The expert`s opinion as from the public sector also from the private one or the civil society, through qualitative questionnaires, promote and argument on the upcoming strategies for the completion of this gap:

- The tourism development with a low negative impact on the environment, like water sports without the involvement of motor vehicles, walks in nature, bike trails, boating, canoe sprint, sportive activities in nature etc.;
- Good orientation of sun and beach tourism (towards the creation of sustainable practices), as well as the encouragement of developing other forms of alternative tourism;
- The promotion and the social involvement of vulnerable layers.

These strategies will have an impact on the economy of the area, as well as on its development based on the principles of stability. In the conditions when tourism development is firmly oriented towards the sea and beach development, which is a massive form, unplanned and unstable, there is a need to undertake a radical reform which will change the existing mentality over the exhaustive exploitation of sources, the creation of appropriate conditions and the favoring of the tourist-economic activities which promise and guarantee:

- Sustainable use of sources;

- Diversification of activities;
- Real facilitation from every obligation;
- Taxes and fees for their activities as long as they generate incomes only for their own needs;
- Facilitation over every activity that encourages local wage employment, to women and people with disabilities.

The gap and needs for sustainable utilization of all natural, ecologic, environmental potential of the area, wetlands through the tourist activities is connected even to the fact that it is one of the areas with very little investment, but with a careful management there is the possibility of organizing different kinds of activities, with a combination of products, such as:

- Water sports, agritourism;
- Nature-based tourism forms: bird-watching etc.;
- The creation of environments for persons who suffer from lung, breathing diseases;
- Or, it might be a perfect destination for setting up an aquarium, as a tourist attraction.

Gap 4. The need of adapting the capacities of tourism structures according to the demand

Even though one of the biggest problems of tourism industry is associated with the discrepancy between the elasticity of demand (the demand changes, it is elastic, it is affected by international tendencies, etc), and the rigidity of tourism supply (investments in supply are expensive, acquire a lot of time, and do not change every time the demand changes), this is not a case concerning the BRVPL area. This area has always been *identified* and evaluated for the same sources and potentials, while *tourism supply has not been developed, improved and modified*, in order to adapt to the qualitative improvements of incoming flux, but at the same time they have to be adapted and classified according to segments and age.

So, there are noticed these gaps in the accommodation structures:

- In both, new and old infrastructures there is no improvement of services, except of the basic ones. So, *these structures offer only the essential services of bed and breakfast*, occasionally even other services. Nowadays tourists are demanding, they have a lot of needs, and it's necessary to serve them the best way possible;
- *There are no classified structures for only young people*, for example there are no camps or hostels (for as long as young people make up an incoming and evaluating potential);
- *Guest houses and agritourism structures* which produce sustainable development practices are not active yet and very important to the accommodation sector;
- *The encouragement to use bicycles and public transport as a positive indicator of sustainable tourism practices*. The augmentation of public transport use with 18% is a good indicator and identifies the need for the local government to encourage and stimulate local public means of transportation, and also the use of bicycles. People who live in this area are intensive users of bikes as an everyday tool, in comparison to the whole country, and this attribute, as a competitive advantage must be put in use to tourists as well.

The improvement strategy of this gap is associated with:

- The improvement of the capacity in quantity and quality*. This means that accommodation structures should offer different services within the unit, with a standard and unique style (if these accommodation units are located in specific areas which transmit the unique sense of hospitality), and to not focus only to bed and breakfast (*qualitative improvements*);
- The augmentation and diversification of accommodation capacities*. This is related to the encouragement of building the capacities of this format: agritourism, guest house, rural tourism, green economy practices, etc. These

accommodation capacities should offer elements of culinary tourism, encourage the investors to follow agritourism practices, but especially through the usage of agricultural and livestock local products. This way the tourism developed through agritourism, will further encourage the development of agriculture, livestock, will protect the environment and raise the communities' awareness, becoming a sustainable business practice;

c) *The augmentation of capacities according to segments and current target markets.*

- There should be built structures and capacities for young people who love nature and sportive activities etc. (*quantitative improvements*);
- There should be built accommodation *capacities* and structures appropriate for *old people* in order to be easily accessible to them. The incoming flow of international tourists in the tourist season in the area are dominant, especially the middle aged, Asian and European elderly;
- *Even the services in these structures should be suitable to these ages*, for example for the elderly there should be installed health services, walking trails, elevators and other structures inside hotel units and even in their rooms;
- According to the calculation of upcoming flows in the area, but also to the international tendencies of who will visit and prefer Europe better, accommodation units should adjust their capacities for the upcoming accommodations (in quantity and quality).

d) *There should be a diversification and improvement of the essential services according to the style and specifications of the area.* For example, in a rural area there should not be prepared the same breakfast as in the center of Shkodra, or the rooms should be arranged according to the traditions of the area. This way hospitality and accommodation elements of the service will enforce the unique character of the tourism product, standardize the service (because now it is offered in a particular way and different from other accommodation units), and they compose a marketing and promotional element;

e) *There should be an enforcement of the accommodation capacities regarding the recent fluxes, upcoming tendencies and target groups.* According to the **sun and beach tourism**, it is identified that:

- On one hand, some of the main reasons for the frequentation of this area are: the sun, sea, beach, climate which are related to the sun and beach tourism, which in the future will certainly be a considerable potential as it has been so far.
- Also, generally the sun and beach tourism are related to the accommodation in hotel structures and less to rent houses or guest houses. Tourists who come for the sun and beach generally prefer hotels rather than guest houses or rent ones. This way, the high demand for sun and beach products is in parallel with the high demand for accommodation in hotels (54% of them are accommodated in hotels, 27% in guest houses and 15% in rent houses). These statistics show that, *in the near future, hotels will continue to be the most preferred and chosen form of accommodation from the tourists.* That's why it is necessary that *the current hotel structures should enforce their accommodation capacities, improve their knowledge regarding the offering of essential services* (bed and breakfast), enrich their knowledge regarding the augmentation and diversification of extra services, as well as to *adapt these capacities and knowledge to the future trends.*
- On the other hand, despite the individual or small group trips, nowadays there is a tendency of travelling in large groups by busses. This is connected to the fact that the trips last long and include parts of Balkans, so a single multi-day trip includes visiting all at once a few cities in some of the Balkans countries (if the trips are international), or a few cities in Albania (if the trips are national). Moreover, the tendencies show that the level of expenses that tourists have inside their tourist package to visit places, itineraries and destinations, is relatively growing. This is the

reason why large-group trips by busses will continue to grow. Also, the study has shown that the small number of rooms/beds inside a hotel is one of the main gaps in the accommodation capacities. The hotels of the area generally have 20-25 standard rooms, and they do not differ much from one another. So, it is noticed *a gap in the accommodation capacity regarding hotels with a large number of rooms and suitable to receive large groups of tourists*. There is an immediate need to build accommodation structures regarding the sun and beach tourism with a considerable number of rooms (80 rooms) in order to welcome 1 or 2 busses within the same structure without the need to separate tourists in different hotels.

But, *the adaptation of capacities based on target groups continues even for the **other products***. Such as nature-based tourism which is a reason of coming, but also of returning back on area. Specifically, over 20% of the ones who frequent the BRVPL area, have chosen it for its nature: bird-watching, nature-based activities, peace and tranquility, adventure tours, hiking, flora and fauna, etc. This analysis emphasizes the *need to have capacities that support these services, thus the need to support all the above-mentioned nature activities: adventure, bird-watching, hiking, etc, with:*

- The hosting structures suitable for these target categories;
- Supporting structures for other services, but in support and completion of this product and market. This category of consumers has for sure its own specifics in consumer behavior, in demands and preferences. That's why it is necessary to have specific knowledge regarding this category.

These are related to the immediate need to provide *knowledge* and *capacities* in:

- The offering of essential knowledge to accommodation structures regarding hotel techniques, hosting techniques, the offering of services;
- The offering of knowledge in how to include the characteristics of the area into every detail of the accommodation structures, and to be transmitted in the most touchable way in services;
- The offering of essential knowledge over all the types of accommodation capacities which adapt to the area but highlight its values and traditions. This means that the community and tour operator should be trained, informed, encouraged towards investment in such formulas: agritourism, guest house, green economy, rural tourism etc.;
- The essential knowledge not only for the main tourism products that this area offers and that tourists want and the adaptation of accommodation structures with these products, but also the building of new structures or the offering of knowledge about *the characteristics of the types of tourist's behavior who aim* visiting the area in the future. For example, over 20% of tourists who will visit the area in the future, will be the ones who are nature based, then tour operators cannot be indifferent over studying the type of this tourist, his needs, exigencies, behavior, the services he wants etc.

Gap 5. The need for the orientation of investments in supporting infrastructure

Despite the identification of the above mentioned needs for capacities (just like the sun and beach products as well as other products), and the suggestion with the right strategies for the covering and their support with policies /strategies/orientations which are related to education, knowledge, growth and the improvement of the skills and capacities, it should be underlined that: *The selection that tourists make towards a broad range of accommodation structures, and the focus not only in one of them makes up a positive argument because:*

- This shows that tourists are previously informed for what the area offers as accommodation to fulfill their needs;
- The tendency to diversify and distribute tourist nights in many different types of accommodation is positive and a good indicator for policymakers or investments orientations in accommodation. Startup, new businesses or investors

who want to invest in the tourism rigidity supply (accommodation), are now sure that structures such as hotels, guest houses, rent houses, or camps are in high levels of usage and consequently might be a safe investment. An interesting way would be investing in others structures with the purpose of encouraging even other usages;

- It makes up a good comparison base, because there are many types of structures to be developed. On the other hand, the supporting infrastructure of tourism supply has the same importance as every tourism product offered in this area. The existence of a qualitative supporting infrastructure positively supports even the classic tourist of the sun and beach, or the classic services of accommodation and food. But supportive infrastructure has a special importance within the framework of general development orientation of Protected Area of Buna and Velipoja towards sustainable development practices.

From all the qualitative and quantitative analysis included in this study it results that, how tourist's perception over supporting infrastructure as well as the opinions of tour operators and public levels show *a gap of this infrastructure in quantity as well as quality*. For as long as there exist tendencies regarding the alternative forms of sustainable tourism, but even tendencies and increasing numbers for the BRVPL area, is vital for the existence of the sector of tourism, the improvement of the infrastructures which support these forms, as well as an orientation of investments toward supporting infrastructures as a main source in the area to support the tourism supply.

There is a lack of tour operators' awareness over the importance and the value of hiking, biking, or other uses which support alternative forms of tourism. But tour operators should be oriented and educated not only towards the existence of main roads and highways but towards the evaluation of secondary rural roads and specific paths.

The strategy of improving this gap is directly related to:

1. The orientation of new private investments towards the building of the capacities which support other forms of alternative tourism infrastructure.
 - Qualitative improvement of the existing places and the addition of new picnics spots;
 - Bike and walk trails, which support other alternative forms of tourism. Actually, the existence of these trails is very little mentioned and especially from that part of tourism market which is trying to produce new products and tourism services;
2. The orientation of public policies and the raising of awareness in the local public decision-making sector to get the attention, support and concrete public investments to benefit the building of this infrastructure. Based on the standards and international principles of sustainable tourism, if the public level reaches this objective, then it has enabled the completion of the development orientation towards the objectives of sustainable tourism.

Gap 6. In relation to the structure of tourism products it is identified a gap in diversification of the tourism product (there is a lack of knowledge and capacities to diversify, promote and marketing a diversified tourism supply).

It exists an immediate need to include on the market all the elements of the tourism basket which make up potentials (natural, cultural, historic, customs, flora and fauna, the environment, religion, culinary, etc.). The massive frequentation of the sun and beach still make up one of the most dominant forms of tourism products. This is related and identified even through high seasonality and the low level of room occupations in the period off tourist season (as it was analyzed above), because the accommodation structures (hotels, rent houses and guest houses) connect

their usage from the tourists only to summertime and the sun and beach. They evaluate the fact that they have potential, but they relate this to the future and do not try to diversify the supply throughout the year. Tour operators do not include in their packages (as for the Albanian segments also the international ones) cultural, historical elements, or nature-based activities, but even when they do so, they include the same elements without giving options, without diversifying and offering knowledge for the whole potential in tourists, be it Albanians or not (local tourists).

On the other hand, products and nature-based activities, bird-watching, etc. make up one of the main reasons why tourists would return. There is a connection between the analysis that aimed to create a connection between the motifs of coming and visiting, the reasons of returning and the factors that they would like to improve. *There is accordance with the fact that nature and environment make up a reason to come and return.* This means that the tourism products based in nature activities should make up and be considered as one of the major forms of the product` basket of the area.

The identification of the Gap: There is a lack of knowledge and capacities to diversify promote and marketing a diversified tourism supply.

Tour operators should be educated, made aware of and trained over the diversification methods of tourism products. There is a need for more knowledge regarding the marketing of products and destinations, the use of social media for information, promotion, marketing, sales etc.

The trainings should include as many segments and markets inside the area as possible, ex public levels (technical and decision-making) should be involved in training and development programs which are based/supported on knowledge, and later on may support the private sector to enable diversification, sales and the marketing of the region.

Trainings must be intensive not only for the owners of hotels, rent houses or guest houses (which are the most popular) but also for *tour operators and agencies, tour guides*, etc., in relation with the different methods of promoting and selling a product and its diversification, ex:

- Low-cost and attractive packages for certain categories in peak and off season;
- Sun and beach packages with reduced prices during autumn and spring;
- The inclusion of cultural, historical and natural elements in the summer packages (mixing and diversifying the product of tourist season);
- The release of specialized and/or profiling packages, ex; only historical or gastronomic packages. This would include more areas according to their tradition in culture and gastronomy, would increase knowledge for a wider level of the area, as well as it would serve as a good marketing;
- The launch and promotion of the unique and nature-based products/activities as single products and even composed with others.
- The creation and promotion of mix packages with the neighbor countries in Balkans in order to start being part of the Balkans integrated products.

Gap 7. The need for the improvement of tourism products and the involvement of tour operators in certain schemes

In the conducted study, especially over the tourism supply, it is identified a gap in the continued improvements of tourism products, the concentration only in essential services, as well as the exclusion of tour operators in all the schemes which orient public levels (gap).

The improvements that should be made to the products are important not only for the area, economy, tourism sector, but mostly for tour operators. The improvements should be present in those products and other types of tourism which are more important to the area, strongly related to nature tourism, because of the characteristics of the protected area. This serves to show that even tour operators are interested to protect their area, improving tourism supply elements which will bring stability in their country, which is the basis for future success of tourism industry. The perception of TO is quite positive regarding the increasing tendencies for a lot of products in the area, but most importantly they are aware of the fact that there is the need for the improvement of supportive services and of tourism product itself such as: agritourism, nature, adventure. This means that the level of awareness is present in these tour operators.

The mentioned challenges from tour operators in the BRVPL area are more related to the low level of accommodation capacities, especially in the conditions of demand increase from the international market. There are other problems: low level of infrastructure standards and the absence of training of many other elements inside the tourism sector. Actually this coincides even with the perception of this field experts, decision-making public levels and other stakeholders that through qualitative questionnaires have expressed the same reasoning, but also have considered and augmented even other elements such as: the low level of technology usage (starting from the absence of e-mails to the booking systems which create difficulties for the pre-planning of the rooms occupations), the inclusion of more knowledge and special skills.

The tour operators judging and reasoning over what can be improved should be integrated to the most successful national schemes, with international orientations over the tendencies of skills, knowledge and capacities. TO estimate that some aspects of the product can be improved, especially some aspects that need special knowledge and skills. So:

- There must be improvements in the knowledge level and services in other structures, such as museums, information centers, etc., and even in the accommodation service and the general level of service;
- There is a need for more knowledge specialized in tour guides, in the staff which is closer to the client and for information via internet.

Quite important is the opinion and evaluation that TO give about which would be some of the factors that affect the improvement and knowledge in tourism. Considering the huge importance of service improvement in tour operators, the most important mentioned factors are: *the factor of public and private investment, of human resources through attentive management, the enforcement of legislation in certification and standardization and standardizing the tourism activity.* This way, tour operators estimate as the best methods to improve these services:

- a) The specialized knowledge according to the type of service;
- b) The augmentation of the number of demanded professions/skills;
- c) The augmentation of training during work.

TO should create *the right structures and accommodation capacities* to welcome tourists (target groups), *should raise the operators` awareness, the education of human resources* regarding these products in knowledge as well as capacities in order to serve in special skills.

Gap 8. The need for the adaption of the capacities of tourism structures, services and hospitality with accessible elements to all categories

The accessibility makes up one of the most important criteria in today`s certifications over the accommodation structures conducted from the international institutions; it is related to the level of use of the infrastructure from

disabled people. The standardization of tourism services is a condition and European criterion for a sustainable destination, as well as it makes possible the certification of sustainable tour operators' practices.

There is a huge gap of knowledge regarding the accessibility and its need for adaption in every accommodative structure/restaurants/other welcoming structure (beaches, museums etc.), and there is a rare and almost non-existent level of application.

There are no known structures for the accessibility of disabled people and this is a huge problem when it is to be compared with European Union structures. In fact, this problem is present in almost all the businesses in Albania, but for tour operators is vital to be adapted in the process of gaining an increasing market in Europe and the global one.

Gap 9. The gap of specialized knowledge and profiling tourism products

Tour operators themselves identify a huge gap of knowledge over all the categories of potential, consequently the tourism activities. It exists a huge gap from the guides' side for all the churches, historical and cultural values, historical knowledge, the connections of the area with the Balkans, but also the whole flow of Buna.

The gap of knowledge limits what can be offered. This is noticed because the tour itineraries include the same places to visit. The same thing happens even with the inclusion of historical and cultural elements in the packages for Albanians inside Albania for example: tours only in the museum and castle of Shkodra while there are a lot of potentials, information and sources. This is related to the gap of specialized knowledge from the tour guides, agencies and tour operators' side. In the meantime, from the professional and technical level, from well-known historians and geographers of the area, but also from the perception of the community it results that the information exists, but the transmitted heritage is partial and results in the loss of the assets of the area. That's why, the strategies which would fulfill this need might be:

1. The inclusion of full, extended, traditional and historical knowledge in as many middle school, high school and university 's curriculums as possible;
2. The inclusion of specialized knowledge which coincide not only with the development needs for a sustainable use of environment, ecological, natural potentials of the wetlands etc., but also with tourism tendencies in Europe: knowledge about marketing, information technology, digitalization, reservation systems, simple and complex booking systems, foreign languages, technical skills etc.;
3. The involvement and collaboration between the stakeholders: university, environmental and nature specialists, historians, etc. over the selection and the way how this knowledge would be included in as many education levels as possible;
4. The involvement of many tour operators as possible in the acknowledgement and the awareness regarding this knowledge. This knowledge should be included even in different packages of trainings for the staffs and other human resources which are in direct contact with consumers.
5. The establishment of a network between tour operators which after being involved in the transmission of specialized knowledge (through trainings, etc), should be oriented in a second phase in their transformation in profiled products such as:
 - 1-day bird-watching packages with/without visits in specific areas inside the wetlands;
 - The establishment of itinerary/packages/visits in times or days when happened the special period regard to birds;
 - The establishment and diversification of nature-based packages (activities) or packages combined with flora and fauna;

- The establishment of different diversified mix packages, which aim to include the elements of medical tourism, culinary and nature in a single package or the sun, culinary and nature etc. The inclusion of a wider range of elements of nature, environment, flora and fauna, history, religion, art and tradition, combined with the basis of culinary, will make up a way to attract new segments and to make those who come for the sun and beach return;
- The establishment of special and unique different packages/products for the wetlands. The inclusion of BRVPL in unique products (so tourism products which are consumed inside this area and do not include elements outside of it), or even products mixed with those of different areas. This way, a diversity of choices is offered to tourists/visitors.

Gap 10. The gap in knowledge for the human resources in tourism over specific knowledge such as foreign languages, communicative skills, marketing, branding, information technology etc., as well as the need to improve the general knowledge according to international standards and future trends.

The conducted analysis through the study identified approximately the same gaps in skills/knowledge/training as the ones introduced in the first part of the conducted study in relation to the needs and the tendencies of tourism in Europe. These huge gaps in certain skills and capacities in Europe have resulted in the identification of these general needs in the tourism sector, but more or less in the BRVPL there are introduced the same gaps.

Thus ex., because of the importance and value of the tourists/visitor's perception of the level of knowledge/skills/trainings of human resources/staff that directly works in the tourism sector, but even those who affect it in an indirect way, this analysis is concentrated in two directions:

- The perception of skills/knowledge/capacities from other operators (so, outside the accommodation structure: travel agents, information centers, etc.);
- The perception of skills/knowledge/capacities about human resources inside accommodation structures.

The conducted analysis over the opinion and even the evaluation from local and national experts has shown that there exists a gap in the level of knowledge in the BRVPL area in general (the opinions from outside the accommodation structures):

- Human resources present *low levels of knowledge regarding technology, foreign languages and ICT and tourism sector, while there is a better level regarding general communication.*
- Human resources present a better general considerable level of knowledge than that of specific knowledge.

Consequently, it is identified that the need for intervention or improvement of technical/specific levels of knowledge and skills in tourism sector is relatively high. Even though the level of communication is positively supported and valued, it still exists a general need to improve especially the communication inside the tourism sector (including hotels, restaurants, agencies, etc.).

The gaps and needs inside the accommodation structures are summarized below:

- Hospitality:** It is important to highlight and evaluate the element of hospitality inside the accommodation unit. The tourists highly rated the level of hospitality. In fact, this has affected the choice of destination.
- Communicative skills:** are rated as average and above. The majority has rated it 3 out of 5. This shows that communicative skills should still improve and TO should work on them.
- Foreign languages:** Regarding foreign languages the situation is even more critical, because the rating is below average. So, there is a need to develop and augment the trainings in foreign languages in general and in tourism in particular.

In conclusion: there is an emergency need to improve the *capacities* and the *quality of services inside accommodation structures* while the essential services are offered such as accommodation, bar, restaurant, etc. There is a need for

the improvement of the level of foreign languages, technology and communication skills. In the meantime, the rating remains high regarding hospitality elements. Also, the knowledge of human resources inside the accommodation structures regarding the area, biodiversity, habitats, birds, wetlands, etc., should increase because after the TO's opinions they still are below average.

While referring to the same perception, but outside the accommodation structure, the service's opinion refers mostly to the service from info points, tourism offices and agencies, municipalities, etc. Again, the level of hospitality is high, but there are identified *low levels of their knowledge regarding technology, foreign languages and ICT and tourism sector*.

The strategy of the improvement of this gap is directly related to the completion/fulfillment of the needs through at least:

- a) Trainings and specialized courses.
- b) Courses, intensive and continuous trainings, as in general managerial levels, for different skill (marketing, finance, service, production, sales, human resources, communication, etc.), as well as for technical levels up to front line services.
- c) Specific certifications for certain professions which are related to technology, marketing, hospitality, consumer service, hotels and restaurants sector, etc.
- d) The certification of tour guides through the national and international known systems of evaluation.
- e) The inclusion of the increasing of demand for foreign languages and communicative skills in all the levels: from technical staffs that do not have direct contact with the tourists to the ones that have direct communication (ex, reservations);
- f) General informative courses related to history, geography, environment assets, hospitality, culture, culinary, protected areas, wetlands, flora and fauna, etc.

The efforts to make the above trainings/courses and certifications possible should:

- Not be focused on the support of the local public level, because studies show that the local public levels themselves make up targets which need trainings and certification the most and have huge gaps in knowledge and trainings. These efforts should aim the support of important national and international institutions;
- include different forms of trainings: continuous (along the working process in periods of time, distributed throughout the year), or at the very start;
- aim to include such courses in professional schools in order to fulfill the above needs which the operators and stakeholders face in tourism, but also the whole tourism supply of the area;
- be based, consulted and supported continuously from tour operators;
- include practices in the best tour operators of the area, but also to consider possibilities for international experiences;
- Include the whole specter of the service perception. Because of the fact that the service is difficult to percept (differently from physical products) and on the other hand, inside the category of tourism services there are included a wide range of services, the ones obtained in accommodation services (bar, restaurants, the waiting rooms, accessibility, room services, etc.), the ability that the area has to offer information through info points, or the perceptions over the influence they have in the area regarding the environment, protected areas, wetlands, etc.;
- Include the whole category of individuals (human resources/staff) that have direct or indirect interaction with the tourists, including tour operators themselves, because these trainings or courses will make them aware of the effect that their actions have in wetlands in particular and in the environment in general.

In conclusion, it is identified a need for the development of a *BRVPL web platform* with the key information for the wetland management, including the promotion of sustainable practices and other information. The web platform will serve as a compendium of knowledge about BRVPL as well as on wetland and costal conservation and management, designed in that way to enable replication for other wetlands/costal sites in Albania and beyond. Maybe this can serve as a midterm strategy, but the platform will be developed and launched.

Gap 11. The flaw and gap in the capacity that tour operators have in offering tourism services

The flaws and gaps to adapt to the tourism demand are present in a few levels and directions and this is related not only with the nature of products and tourism services, the characteristics and complexity of the tourism sector, the difficulty to adapt in the sustainable practices, but also with the heterogeneity of the tourism sector, because the development of this sector affects other sectors as well, such as the environment, agriculture, livestock, flora and fauna, education, etc. Anytime the tourism develops and is monitored in a careful and planned way, the other sectors affected from it, are always more valued and developed. The quantitative analysis identifies these 4 summarized moments:

- *The general management capacities of tourism entrepreneurs:* there is an average rating for this level. On the other hand, the education system offers general knowledge in the tourism sector through universities. Certainly, they are not sufficient and there is a huge gap for more specialized skills, in order to be competitive in the market, to attract as many tourists as possible and to gain competitive advantages for the future.
- *The knowledge over environment, its stability and evaluation* are directly related to the awareness to protect the environment and the necessity to value and protect the wetlands. It is emphasized from the tour operators as well as tourists/visitors that one of the main directions of the future instructions in order to improve the tourism services sector is the improvement of knowledge regarding environment, the sustainable use of environment, its evaluation and maintenance.
- *Specific knowledge regarding languages, guides and their diversification, quality services in bars and restaurants:* the same logic is applied to specific knowledge over specialized instructions, quality services in bars, restaurants and hospitality sector in general, knowledge in foreign languages etc., are considerable and the majority of tourism emphasized, that there is an urgent, specific need to improve the situation.

The strategies regarding the fulfillment of the above-mentioned gaps are mostly related, attached and referred to: the undertaking of certain initiatives which should challenge managers and tourism entrepreneurs. These are not just general and specific trainings, but *a need for a change and orientation of a new education over the category of new and existing entrepreneurs in the tourism sector*, which should be related and orient the formation, awareness, training and certification of knowledge towards a smart use of sources, potentials and assets of the area, with the purpose of attaining and enabling the practices of a certain development which not only improves the economic welfare but also increases and empowers the social welfare while taking care and maintaining the environment, wetlands, flora and fauna, animals and rare species, etc.

The qualitative perceptions and quantitative analysis strongly orient the need to undertake trainings: general and specific courses before and during work or different forms of connection. Based on the perceptions of this field's specialists, the information should not only be received from university education, but also from specialized professional schools, specialized departments, university profiles, intensive trainings and other specializations:

- More specialized training during work;
- Intensive training before starting a certain job/profession position;

- c) Specific courses/professional diplomas for special sectors of tourism hospitality, guide and restaurants services, etc.;
- d) Certifications of professions: tour guides, etc.
- e) Profiling inside professions: specific and specialized guides over history and culture, environment and protected areas estimate, guide for flora and fauna and rare animals and species, etc.;
- f) Internships in similar other successful businesses.

Gap 12. The gap in standardization and tourism structures certification and its services

There is a need for the implementation of sustainable development indicators through tourism, and the need for international certification of tourist accommodation facilities. Standardization through the different schemes of certification (stars, service level and staff, etc.,) is not present in the BRVPL area businesses. The lack of emphasis or the inescapability of the use of quantitative and qualitative indicators that measure, evaluate and standardize sustainable development in the area makes it difficult to standardize tourism services.

Just as the provision of tourist services is controlled by private and public institutions, it is standardized and consequently improved by allowing the diversification of the tourist. The two ways a service evaluates itself are: standardization and differentiation. Parallel to this is the certification of the structures that support its provision, in this case the structures and the tourist capacities. In the BRVPL area is almost non-existent the certification systems of touristic structures, tour operators decide the number of stars themselves based on the perception they have for the services they offer and the level of capacity of their structures.

The standardization of tourism services provided by tour operators is directly related to the implementation of sustainable tourism indicators and the measurement and assessment of sustainability practices in the Buna and Velipoja River region. Through the periodic implementation of a system of sustainable tourism indicators, establishing practices to carry out assessment and measurement of development in the area is aimed at a new concept for the BRVPL protected area destination. In this way the standardization of such a process will result in unique services, standards, quality and according to norms of the European community.

Gap 13. The lack of knowledge for marketing, activities/strategies/means of marketing

This gap that is related to the lack of knowledge for marketing, activities/strategies/means of marketing is referred to and directly related with *the indicator of the usage of marketing activities*, and forms of social marketing to elaborate the right strategies for the branding and marketing of the destination (BRVPL area and the local production).

The fact that 56% of the tourists have gotten information and have found the area as proper to be visited by friends and relatives, shows that *friends and relatives are the most well-used source*. This reflects 2 moments:

1. *The engagement and pleasure of the tourists should be maximal*, because there are the tourists who visit the area and spread the word to bring other tourists. Moreover, for as long as other means are not active for the marketing and the promotion of the area, the tourists remain the main source of information. Also, for as long as the touristic product in the tourism sector is almost touristic service (touristic industry is a service industry), results for the enjoyment to be taken directly from the services. So, the attempts to improve touristic services in the manner of their offering should be maximal;
2. The non-usage from tourists of other sources for getting information for the area, not just friends and relatives who have visited the area, words and opinions. So touristic operations in those few activities they do to market the area, don't include:

- marketing/activity, web marketing, marketing of social media, digital marketing;
- don't have a data base with date from former visitors to inform them for the offers.
- the non-promotion and non-usage of special events of nature, historic or heritage type, for marketing purposes, etc.

In these conditions, while word of mouth marketing makes the main form, a covering strategy of this gap is needed, which includes information, education, and the equipment with knowledge of the services, marketing, consumer (tourist/visitor).

Gap 14. Services that are offered in the BRVPL area are not qualitative and standardized

In all the questions that are referred to the service, what would improve the reason of visitors' coming, or why they wouldn't return, etc., in both questionnaires results that:

- The services are not of quality and they leave a lot to be desired;
- The perception that the services are not qualitative and not standardized is the same from both the touristic operators and the tourists. Both sides judge there is a lot to be done in the sector of touristic services and the way of their offering. The reasons of coming coincide with what they visit when they are in the place, but surely these are not reasons for them to return. This because of the problems they have reflected from the offering of services too.

Despite that there is a positive in the pleasure of visiting of this destination; it's identified that the level of service, the culture of service, receiving capacities, the pollution and the damage of the environment make the main reasons why a tourist wouldn't be happy with his visit. It's emergent to undertake an intensive campaign and a detailed plan that would include:

- general and specific trainings;
- specific courses for particular professions;
- building of capacities that are well distributed according to studied calendars with the purpose that the offering of the knowledge to be made distributed in time.

Gap 15. There is a lack of needed orientations of development, improvement and increase of knowledge

The protected area of Buna and Velipoja, but also all Shkodra regions is known for the culture and the general level of exchange and hospitality. This area has always been identified from local tourists as an area that has a certain level of development, culture and service. Even in the results of the study, despite their opinion, the local tourists have for the general level and specific of the service; define the general culture of this community as one of the strongest points of the area.

Despite the level of culture and some kind of existence of service in general, it's noticed a *lack of general and specific knowledge, good oriented according to market needs, and unoriented as a strategy for the future*. So, it's identified the below gaps and needs:

1. *In all the education levels* there is a gap on the concept for tourism, service, marketing, enterprise, TIK, consumer, culture, natural and cultural heritage of the area, etc.;
2. In those cases when knowledge is present, it's either *concentrated only at education level*, or not in the right direction, this way being totally unorganized;
3. the knowledge transmitted through education levels (school/university) are not based in real studies of the market;
4. the knowledge transmitted in all the education levels in the BRVPL area, *are not integrated and all-inclusive among stakeholders, are not consulted with touristic businesses*, but also for technical levels and specialties of the areas for

tourism, environment, agriculture, fishing, etc;

5. The lack of a general education strategy and knowledge, which also improves the curricula's that can be made in the framework of this general strategy.

Like it has been mentioned above, year 2019 has been defined by international organizations as the year of knowledge, skills, and the creation of work in tourism, and this hasn't been reflected yet in Albanian central and local politics. For the region of BRVPL, the needed knowledge and education would make the qualitative base of each medium-term strategy in each kind of sector that is directly and indirectly related to tourism, environment, culture, protected area, etc. That's why is necessary the undertaking of a General Education and Specific Knowledge Strategy which should be:

- Build on a real study of the market;
- Integrated in all the education levels, which spreads and orientates the knowledge's in a gradual way since the first school years, so the general formation of the youngsters is gradual, according to be gradual, according to the needs of the market, and well-studied;
- Consulted with the business, important local public and private actors, based on countries best practices;
- Oriented since the building, also in the monitoring of its implementation from important international levels, certified and known for this experience;
- To be based and clearly transmit the philosophy reflected by international tendency in relation with knowledge/skills, capabilities today in Europe.

The presence of the lack of general and specific knowledge, unoriented according to market needs, often make one of the main sources of the lack of quality services. That's why it suggested as a mid-term strategy the undertaking of General Education and Specific Knowledge Strategy which will have as a vision the offering of an all-inclusion education (in all education levels), consulted among all stakeholders, that through reflection of local needs of BRVPL area, national practices and international orientations to support the businesses towards the creation of practices of stable development, co-leading the region towards stable tourism.

5.2.3. Summarized conclusions

a. The aim is that tourism operators (TO) should create receiving structures and capacities that are needed to host the tourists (the target market), the awareness of the operators to diversify their packages should be increased, there is need to increase the education of human resources for these products in knowledge as well as capacities to serve in certain skills.

b. Strategies to fulfill the gaps and needs that are mentioned above are related and added not just to the enterprise of trainings, courses, certifications, professional skills, orientation of knowledge, etc., regarding the skills, knowledge, general and specific skills, but we are referred to the realization of a new vision related to:

The need for a change and orientation of an new education for the category of new entrepreneurs but also the existing ones, technical and professional levels in the tourism sector which should be related and orientate the formation, awareness, training and certification of their knowledge towards a good use of the sources, potentials and the values of the area, for the purpose the achievement and enabling of practices of such development that not just improves the flourishing of economy, but especially increases and strengthens the social welfare while taking care and maintaining the environment, wetlands, flora and fauna, animals and rare species, etc.

c. There is need for a undertaking of an General Education and Specific Knowledge Strategy which will have as a vision the offering of an all-inclusive education (in all education levels), consulted among all stakeholders, that through the reflection of local needs of the BRVPL area, national priorities and international orientations, to aim to support the businesses towards the creations of developments of sustainable practices, co-leading all the region towards sustainable tourism.

e. *Knowledge based strategies as initial positive path towards the sustainable practices.* Identifying the main gaps and needs and orienting the main strategies to fill those gaps will serve for further generating new knowledge, capacities of protected area managers and resource users. Capacity development should be treating as a process which must include also civil society, local communities and the private sector. Knowledge and capacity building activities will focus on the following topics: wetland conservation and habitat management, ecosystem services, sustainable land use practices, good governance and rights-based approaches, and transboundary cooperation, conservation and sustainable use of resources.

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