



Vjosa Wild River National Park + Valley
TOURISM MASTER PLAN
2024-2033

Draft December 11th 2023

Table of Contents

List of Acronyms	4
Key Terms	5
I. Introduction	6
A. Vjosa Wild River National Park.....	6
B. Vjosa Valley, Communities and Culture	7
C. Purpose of the Tourism Master Plan.....	11
D. Methodology for Developing the Tourism Master Plan	12
II. Strategic Framework	13
A. Shared Vision & Guiding Principles	13
B. Strategic Direction	14
III. Diagnostic Assessment of the Tourism Sector	15
A. Situation Analysis of Tourism in the VWRNP & Surrounding Landscape.....	15
B. National and Regional Tourism Context.....	19
C. International & Domestic Tourism Trends & Demand.....	21
C.1. The Nature Enthusiast Traveler	22
C.2. The Adventure Traveler	23
C.3. The Culturally Conscious Traveler.....	25
C.4. The SAVE Traveler (Scientific, Academic, Volunteer, and Educational)	26
D. Tourism Enabling Environment.....	27
IV. Analysis & Opportunity Prioritization	28
A. Tourism Planning Framework	28
B. Vjosa Valley-Wide Approach to Thematic Interpretation	29
V. Recommendations & Actions	30
A. Sustainability Pillar	32
A.1. Environmental Sustainability - Becoming a Certified Sustainable Tourism Destination ..	32
Action A.1.a. Leave no Trace:	32
Action A.1.b. Quality Assurance Program - 'Vjosa Quality Mark'	34
Action A.1.c. GSTC Destination Certification.....	35
A.2. Vjosa WRNP Foundation.....	36
Action A.2.a Development of the Vjosa Foundation Commercial Services Program and Business Plan.	37
A.3. Community Inclusion and Participation:	39
Action A.3.a. Maintaining Initial Community Engagement Efforts	39
Action A.3.b. Longer-Term Community Programing	40
B. Financial Pillar	41
B.1. Branding & Marketing.....	41
Action B.1.a. Brand & Marketing Strategy	42

Action B.1.b. Marketing Program	43
B.2. Promoting Sustainable Tourism Investment	45
Action B.2.a. Public Tourism Investment Strategy	45
Action B.2.a. Private Tourism Investment Strategy	46
B.3. Product Development and Tourism Incubator/Accelerator	47
Action B.3.a. Tourism Business Incubator/Accelerator	47
Action B.3.b. Local Artisan Initiative.....	48
B.4. Park Related Tourism Infrastructure	49
Action B.4.a. Information Centers and Stations.....	49
Action B.4.b. Recreation Infrastructure	50
Action B.4.c. Digital Infrastructure	51
B.5. Revenue Generating Tourism Products.....	52
Action B.5.a. In Park Tourism	52
Action B.5.b. In Park and Valley: Scientific, Academic, Volunteer & Educational (SAVE) Tourism.....	54
Action B.5.c. In Valley Tourism.....	54
C. Human Capital Pillar.....	57
C.1. Building the Capacity of Park/Foundation Staff & Partners	57
C.2. Tourism Training for Business, Sites & Attractions.....	58
C.3. Community Trainings & Awareness.....	59
D. Governance & Policy Pillar	60
D.1. Park and Visitor Management.....	60
D.2. Risk and Safety Management.....	61
D.3. Legal & Institutional Enablers.....	62
VI. Consolidated Park Business Model	64
A. Park/Foundation Illustrative Tourism Revenues (Base Case)	66
B. Park/Foundation Illustrative Tourism Revenues (Optimal Case)	67
C. Park/Foundation Illustrative Tourism Costs.....	68
VII. Monitoring, Evaluation & Management	69
A. Monitoring & Evaluating the Tourism Master Plan	69
B. Monitoring Implementation Within the Park	69
C. Monitoring Implementation Within the Valley.....	70
VIII. Summary & Conclusions.....	71

List of Acronyms

ATTA	Adventure and Travel Trade Association
B&B	Bed and Breakfast
CUA	Commercial Use Authorization
DMO	Destination Management Organization
DMMO	Destination Management and Marketing Organization
F&B	Food and Beverage
GIZ	German Development Cooperation
GPS	Global Positioning System
GSTC	Global Sustainable Tourism Council
INSTAT	Institute of Statistics
ISO	International Organization for Standardization
IUCN	International Union for Conservation of Nature
LNT	Leave No Trace
LTO	Local Tourism Organization
NAPA	National Agency of Protected Areas
NGO	Non-Governmental Organization
NOLS	National Outdoor Leadership School
PPP	Public-Private Partnership
QMS	Quality Management System
SAVE	Scientific, Academic, Volunteer and Educational
SDG	Sustainable Development Goals
SOP	Standard Operating Procedure
TEDA	Technical and Economic Development Areas
UNESCO	United Nations Educational, Scientific, and Cultural Organization
UNWTO	United Nations World Tourism Organization
VWRNP	Vjosa Wild River National Park
WTTC	World Travel and Tourism Council

Key Terms

Nature/Ecotourism - "Nature-based tourism activity in which the visitor's essential motivation is to observe, learn, discover, experience and appreciate biological and cultural diversity with a responsible attitude to protect the integrity of the ecosystem and enhance the well-being of the local community. Ecotourism increases awareness towards the conservation of biodiversity, natural environment and cultural assets both among locals and the visitors and requires special management processes to minimize the negative impact on the ecosystem."

- UNWTO

Sustainable Tourism - "Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities."

- UNWTO

SAVE Tourism - "Scientific, Academic, Volunteer and Educational tourism:

- **Scientific tourism** - travel that helps destinations with knowledge and support to protect the environment... done by professionals in a specific field of expertise.
- **Academic tourism** - travel by professors, researchers and students for academic purposes... such as studying abroad programmes, thesis research, graduate work, etc.
- **Volunteer tourism** - travel for the purpose of volunteering in projects and activities in combination with the conventional elements of tourism travel.
- **Educational tourism** - [travel] with learning experiences and opportunities for self-improvement, job development, career enhancement, self-actualisation, etc."
 - *EU Center for the Promotion of Imports*

Adventure Tourism - "Tourism which usually takes place in destinations with specific geographic features and landscape and tends to be associated with a physical activity, cultural exchange, interaction and engagement with nature. This experience may involve some kind of real or perceived risk and may require significant physical and/or mental effort."

- UNWTO

Cultural Tourism - "Tourism activity in which the visitor's essential motivation is to learn, discover, experience and consume the tangible and intangible cultural attractions/products in a tourism destination. These attractions/products relate to a set of distinctive material, intellectual, spiritual and emotional features of a society that encompasses arts and architecture, historical and cultural heritage, culinary heritage, literature, music, creative industries and the living cultures with their lifestyles, value systems, beliefs and traditions."

- UNWTO

I. Introduction

A. Vjosa Wild River National Park

Flowing 272 kilometers from Greece north into the Adriatic Sea, the mighty Vjosa River embodies many of the best undiscovered traits of the valley region it calls home, and of Albania it self: natural, nourishing, and persisting. Since 15 March 2023, this symbolic and ecologically important river, along with its main tributaries including the Drino with Kardhiq, Bënça and Shushica, has been codified as the newly designated Vjosa Wild River National Park (VWRNP), the first of its kind in the world (Figure 1).

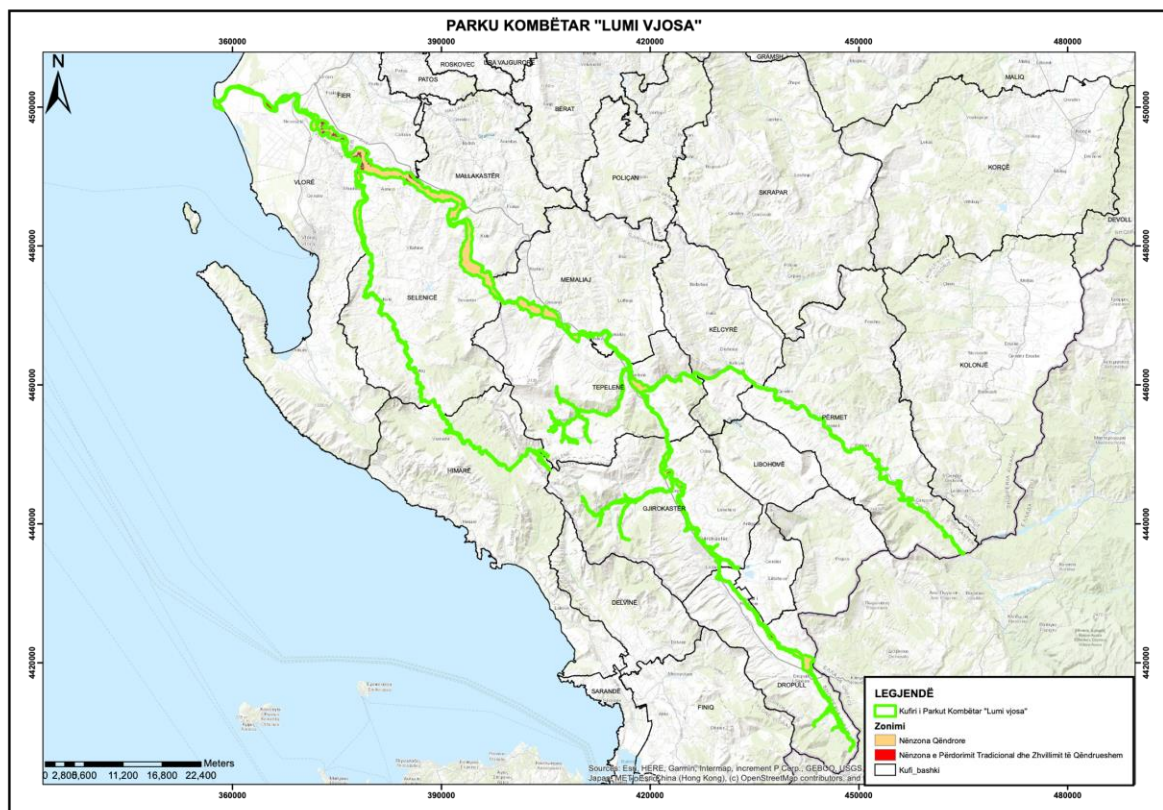


Figure 1. The Vjosa Wild River National Park¹

As a geologic feature, the area containing VWRNP changes dramatically from its start to end, displaying a wide variety of landforms and land behaviors that reinforce the distinctiveness of the park compared to other natural competitors nearby and globally. Across its length the Vjosa River - and now the VWRNP - is commonly divided into three sections with different geological characteristics.

1. The Upper Vjosa - From the river's source streams in Greece into southeastern Albania. This river section is defined by the steep canyons and gorges surrounding it.
2. The Middle Vjosa - A floodplain region of branching water from the Drino River. This river section is known for the large sand and gravel banks formed by the branching river and distinct floodplain flora.

¹ From the VWRNP Interpretation and Visitor's Experience Plan 2023-2032

3. The Lower Vjosa - A lowland area ending with the delta of the Vjosa into the Adriatic Sea. This river section is defined by a greater width and meandering pathway.

The VWRNP is considered an IUCN Category II National park, representing a large area of ecological significance, primarily managed for the protection of native biodiversity, ecological structures and intact natural processes. Along the river 75% is under strict protection, with the remaining 25% allowed some flexibility in aspects of human visitation and recreation. The VWRNP is notable in that its boundaries are largely limited to the water itself and the river banks. Wild Rivers, by definition, exist undisturbed and unimpeded by constructions, barriers, and unlimited access. The Vjosa and tributaries are in this sense the dominant features of their landscape and the most necessary to protect individually as park areas.

Out of a total 12,727 ha, water surfaces make up 47.3% of the park’s area, with an additional 36.1% coming from coastal areas and floodplains and only 9.5% and 7.1% for general land areas and river terraces, respectively. Sustainability was considered holistically as these VWRNP boundaries and zones were decided upon, through a criteria based on both hydro-morphological (i.e. environmental) and land ownership (i.e. sociocultural) factors. In doing so the park is designed to reflect the needs of both the land and community of the wider Vjosa River Valley in the long term.

Tourism activities, especially rafting, swimming, fishing for local consumption and some hiking have occurred on and around the river since before the park's formation. With the formation of the park, these activities will need to be managed to ensure they are not negatively impacting the park. Additionally the river is a central part of the tourism experience and aesthetics of the whole region and must be considered as a part of the broader park management efforts that are planned for the park. This Tourism Master Plan explores the current tourism context for the region as well as laying out a roadmap and priorities for tourism in and around the park over the next 10 years.

B. Vjosa Valley, Communities and Culture

At 6,710 square kilometers, the Vjosa River Valley makes up 16% of Albania’s territory and plays an important role in connecting the country’s different geographic, ecological, and cultural regions. The valley’s biodiversity is considered exceptionally high, a “dynamic, near-natural ecosystem that is without par in the region and Europe” according to a past Vjosa Ecotourism Development Plan.

The region is home to at least 1,175 unique species, including 13 globally threatened animal and 2 threatened vascular plant species. 50 animals and 24 vascular plants within the Vjosa River Valley are also listed on Albania’s national ‘Red List’ of threatened species.

Within the borders of the valley can be found a number of distinct biological, geological, and hydrological monuments that serve as habitats for diverse wildlife (Table 1), along with 10 protected areas including the prominent Fir of Hotova-Dangelli National Park and its unique Macedonia Fir tree. In total, 110 sites have been classified as natural monuments within the Vjosa valley region (Figure 2).

Biological	Forest Bank of Polmeni Chestnut of Frasheri small mosque Ropusha Forest Radova Cypress
Geological	Lengarica Canyon

	Cave of Pigeons Boroçkë God Kameniku Canyon Bokerrimat and Dangllise Cave of Petranik in Kelcyra Gryka and Kelcyres
Hydrological	Thermal waters of Benja Black water in Kelcyra

Table 1: Monuments of the Vjosa River Valley

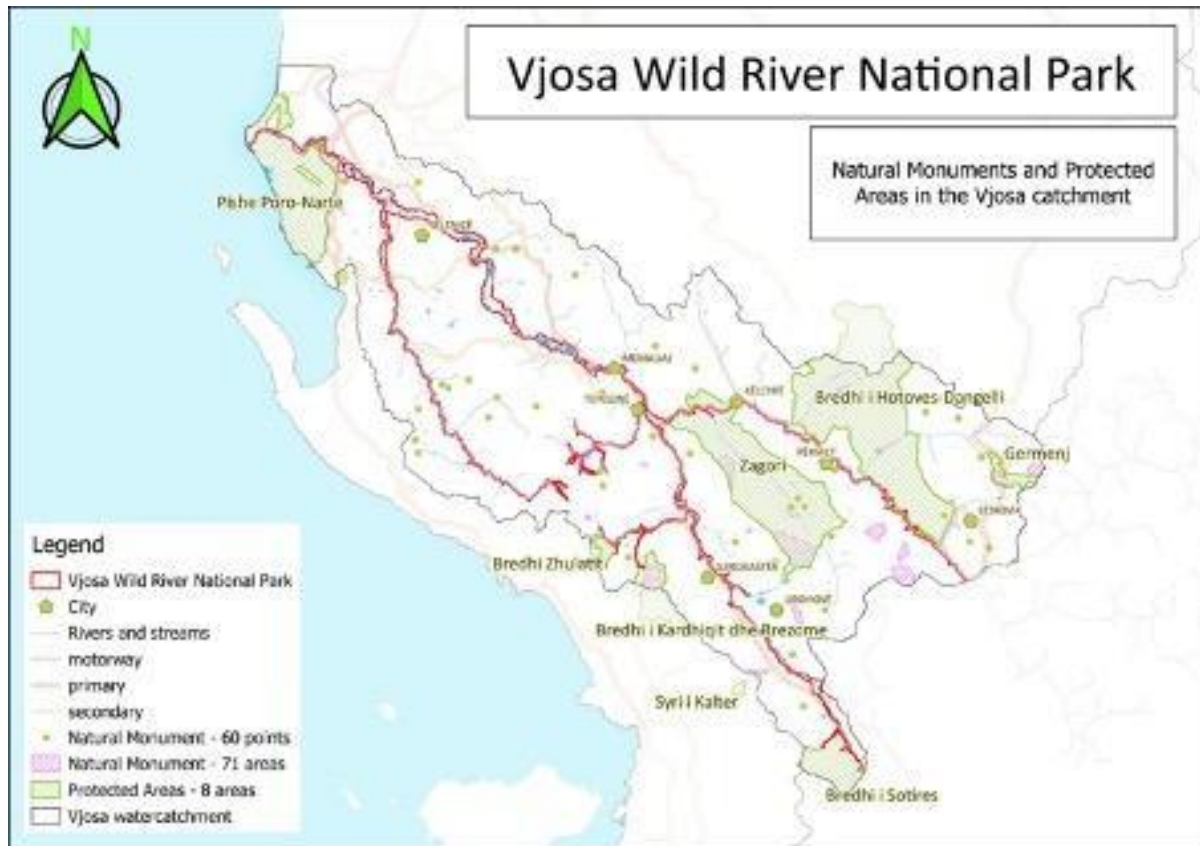


Figure 2. Map of Natural Monuments & Protected Areas in the Vjosa River Valley²

In addition to natural wonders the Vjosa River Valley is also home to 300 cultural monument sites which illustrate the region’s long-spanning cultural legacy (Figure 3). The Vjosa and its tributary rivers have played an undeniably significant role in the development of this history. Human settlement within the valley has been dated to the Middle Paleolithic period, between 100,000 and 30,000 B.C. In the centuries since, the valley has grown, with permanent sites that tell a story of intersecting cultures, languages, ideas, and traditions. Settlements, fortifications, religious centers, bridges and roads add to the historic and cultural tapestry of the area. Today’s most prominent examples of architecture are remnants from Albania’s Byzantine and Ottoman periods, of which the historic center of Gjirokastra, a UNESCO World Heritage Site since 2005, is an example.

² From the VWRNP Management Plan 2023-2032



Figure 3. Map of Cultural Monuments in the Vjosa River Valley³

Intangible cultural heritage developed alongside fixed structures and has persisted in the culinary, clothing, craftwork, literary, song and dance traditions of the modern day Vjosa River Valley. Some examples of valley traditions stand out as wholly unique creations by human society, such as the ISO Polyphony singing method which has been inscribed by UNESCO onto its list of intangible cultural heritage.

Today, the Vjosa River Valley’s living legacy resides in its numerous communities, the largest of which include the cities of Gjirokastra, Këlcyra, Përmet, Fier, and Vlore. Citizens of these and smaller towns participate actively both in their heritage and in interactions with the Vjosa River, often simultaneously and with an innate spirituality. For many, the river is a source of retreat and relaxation, a site of memories made and inspiration found and a symbol of their identity.

That said, the Vjosa River Valley’s environmental diversity faces several challenges from existing and potential activities in the region that originate in the communities and which draw upon the river as a resource. Urbanization remains and will continue to grow as an significant impact on the ecosystem health, particularly in how cities and towns treat wastewater pollution and manage waste generally. Waste byproducts from major economic sectors also impacts the health of the valley’s natural resources. These industries are critical, though inconsistently regulated, making adaptation for coexistence a more realistic goal than complete elimination. Mining and quarry-based extraction of limestone, gravel, and bitumen have historically disrupted riverbeds, while oil and gas extraction is common especially in the lower Vjosa region.

Currently approximately 70,000 people live in the valley. Agriculture and Aquaculture are vital industries for not only the region, but also Albania broadly - 38% of the country’s farming occurs in the valley. Land use, pollution from runoff and fish farm waste, and inconsistent management of

³ From the VWRNP Management Plan 2023-2032

irrigation from these practices pose regular threats to environmental wellbeing that must be considered when implementing new tourism initiatives.

Environmental factors in the Vjosa River Valley interact continuously with the valley's many communities' cultures in many tangible and intangible ways including non-intrusive economic activities. Activity is concentrated most in the valley municipalities of Përmet, Këlcyra and Tepelena, but extends throughout to towns and villages such as Frasher, Benja, Odriçan, Kosova, Leuse, Kosiine, and Maleshove. On a regional level nature is attached to several economic pillars such as various types of agriculture (e.g., wine, meats, dairy products, fruit products), heritage works (e.g., coppersmithing, woodworking, confectionaries, lapidaries), and several forms of medicinal plants. That said, each community features a different mixture of activities and economic drivers, among which is the tourism sector (see Table 2).

Përmet	Major industries: agriculture, agro-processing, services, tourism
	Tourism status: growing, a number of NGO's and others have supported the development of adventure tourism and slow tourism, including rafting, hiking and cycling. There is a very active group of tourism stakeholders in the area.
Këlcyra	Major industries: agriculture, goods production, forestry, fishing, some industry
	Tourism status: underdeveloped; should be built around natural protection and built culture
Tepelena	Major industries: agriculture, tourism, fishing, forestry, some medicinal herb gathering
	Tourism status: several prominent tourism sites established, including built heritage, natural features, and agrotourism services
Gjirokastra	Major industries: tourism, clothing and footwear production, cattle and livestock in rural areas
	Tourism status: significant growth, with UNESCO heritage status, but needing promotion and higher capacity; currently contributing 30% of regional revenue
Memaliaj	Major industries: services and small business agriculture, livestock farming, viticulture, medicinal herb gathering, tourism
	Tourism status: primary river and history/culture based; former coal mine town, now closed, but no development as a tourism feature is noted
Selenica	Major industries: agriculture, livestock farming, services, bitumen mining (1 historical mine), oil-fields (Vlahina area)
	Tourism status: underdeveloped, no noted tourism along its river access (Shushica, a tributary) or mining heritage
Vlore, Kolonja, Dropull, Himara	Major industries: various - Vlore as an important port city and commercial hub, with a growing high-volume tourism sector
	Tourism status: Likely to become a major gateway into the park, especially with the development of the new Tepelene - Nivic - Kuc - Vlore road. Some tour operators also starting to offer activities in the region.

Table 2: Economic and Tourism Status of major Vjosa River Valley communities

C. Purpose of the Tourism Master Plan

The purpose of the Tourism Master plan is to provide a framework for tourism development and management within the Vjosa River valley. This includes the Vjosa Wild River National Park (VWRNP) as the core guiding feature and the surrounding landscape, broadly defined as the water catchment area of the Vjosa valley. The broader valley includes VWRNP and parts of other protected areas as well as towns, villages and rural lands that are a part of the valley.

The reason to look beyond the VWRNP in this plan is that the area contained within the approved park boundaries is limited only to the river channel and banks. A limited number of tourism activities are allowed within this area, and no additional tourism infrastructure is to be built. Therefore tourism infrastructure and activities that are focused on the park have to primarily be housed outside of the park, making the wider scope important. Tourism activities within the valley also have direct impacts on the river, providing additional reason to focus tourism planning at the valley destination level to help guide tourism in the whole landscape that may impact the park.

The plan objectives are to contribute to the well-being and development of local communities, while not compromising the main objective of the VWRNP, which is to support the natural processes that are critical to the conservation of the area's native biodiversity and cultural features.

This plan also builds upon past works including an initial VWRNP Feasibility Study for the park, a Vjosa Wild River National Park Ecotourism and Sustainable Tourism Concept Study (2022) and an Upper Vjosa Ecotourism Development Plan (2021). All documents support the development of destination specific tourism plans, but specifically the latter, specifically stating that "According to the 2018 analysis on the Law No.93/2015 'On Tourism' the current legislation provides a clear architecture of the institutions responsible for development of the tourism both in national and local level." The plan then goes further to propose "territorial units of tourism," a structure which is expanded on in this document. These plans highlighted a number of shared values and purposes, including:

"Bring the VWRNP to and maintain IUCN Category II National park standards (i.e., 75%+ area protection through zoning with reinforced legal and regulatory provisions);

"Capitalize on the existing importance of the Vjosa valley as a [sustainable] tourism destination as well as the strategic value of developing the sector's appeal in South Albanian mountains and rivers, beyond coastal assets only."

Additionally, this plan is a part of, and feeds into, a broader planning effort and governance, to create an Integrated Management Plan for the VWRNP. Beyond the Tourism Master Plan, additional components include a Park Management Plan and Interpretation Plan as well as a Community Tourism Feasibility Assessment. Together these integrated plans and activities support the overall protection and management of the park as well as strengthening of local economies.

D. Methodology for Developing the Tourism Master Plan

This document was prepared by a team from NatureScapes, with the support of Active Albania and Planeterra. The methodology used by the planning team included the following steps:

1. **Understanding the Context:** An initial diagnostic assessment of the current tourism situation in the Vjosa Valley, drawing on published research and plans as well as conversations with key organizations such as NAPA, MInistry of Tourism and Environment and others. This diagnostic step helped to provide context for the team and to understand previous actions and studies.

Desk research included data from the Albanian National Strategy for Sustainable Tourism Development 2019 – 2023, Albanian Investment Council Legal and Institutional framework on tourism, INSTAT-Tourism Figures Albania, VWRNP Feasibility Study (2022), Upper Vjosa Ecotourism Development Plan (2021), Vjosa Wild River National Park Ecotourism and Sustainable Tourism Concept Study (2022) as well as other document relevant to the park and tourism in the landscape.

2. **Stakeholder Engagement:** the team conducted two separate field visits, the first, a study tour in June 2023 focused on key stakeholder meetings and site visits along the river, with the second in September 2023 more focused on broad stakeholder engagement workshops to gather information from stakeholders in the region, understand tourism aspirations, opportunities, needs and issues as well as ideas for how tourism could be developed in the region.

3. **Analysis & Diagnostic Assessment:** The purpose of the analysis and diagnostic step was to determine how the regional tourism offer can be developed to best ensure the protection of the Vjosa River Ecosystems and benefit local communities through tourism. This formed the basis for the teams recommendations and actions.

4. **Draft, Review & Feedback:** The draft tourism master plan was compiled and shared with key stakeholders involved in the integrated planning for the park. The document was edited and updated before being shared with broader stakeholders in the Vjosa Valley region for their inputs and feedback, before the final document was completed.

II. Strategic Framework

A. Shared Vision & Guiding Principles

Uniting the Vjosa River Valley under a single plan requires a shared vision and set of guiding principles for the development of tourism in the region. Past efforts in the region and for the national park have identified several of these. For Albania as a whole the National Strategy defined its overall vision as “monitoring and supporting Destination Management Organization (DMOs), their activities (both in establishment and coordination), and implementing assistance programs for the development and promotion of tourism.” Secondary but also important in this vision was the active participation of local organizations and donors. Similar values are held by past projects to develop the Vjosa Wild River National Park and its surrounding area (Table 3).

<p>Ecotourism Development Plan (2021)</p> <p>Vision: to enhance livelihoods for people and communities in the Upper Vjosa, becoming the national and regional champion for protected areas and globally recognized for its wild land- and riverscapes offering unique visitors’ experiences.</p>	<p>Feasibility Study (2022)</p> <p>Vision: to develop tourism in the Vjosa Wild River National Park in an environmentally, culturally and socio-economically sustainable way that both meets the IUCN standards of protection and improves the lives of the communities in the Vjosa River Valley.</p>
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Table 3: Past Reports’ Mission Statements

For the purpose of this Tourism Master Plan, elements of these visions have been combined for an updated vision for tourism in the landscape:

The vision for tourism in the Vjosa Valley is to become a globally recognized model for sustainable tourism, through innovative management of the VRWNP as well as sustainable tourism development that protects nature and improves the lives of communities in the valley

The 2021 Ecotourism Development Plan is also valuable for outlining many guiding principles necessary for laying an effective foundation for the park. These are listed below and in some cases modified for the current context to include:

1. Align with protected area objectives and policy document for biodiversity preservation (2015-2020) to ensure biodiversity conservation is the number one priority
2. Encourage the establishment of destination management and marketing organization (DMMO) to embed sustainable tourism to develop and flourish, aligning with the National Sustainable Tourism Strategy (2019-2023)
3. Align tourism development activities with global sustainable tourism criteria and SDG goals
4. Promote responsible business models that wherever possible engage and benefit local people, reduce impact on natural assets and deliver conservation benefits
5. Use baseline data and a monitoring program to assess and minimize negative impacts on nature, culture and host communities
6. Forge partnerships that help to protect and enhance the valley’s natural, cultural and economic assets

B. Strategic Direction

Past development reports involving Vjosa Wild River National Park overlapped and diverged in how they structured their park proposals. Their themes and similarities provide guidance in what is well known and what areas benefit from more thorough coverage.

The 2021 Ecotourism Development Plan concentrated its analysis within 6 'Strategic Business Areas' which were designed as themes to guide actions unilaterally across ecotourism stakeholder groups. These areas were: 1) River-related life; 2) Soft adventure and nature-oriented; 3) Cultural and culinary experiences; 4) History and archaeology; 5) Wildlife watching; and 6) Experiential family tourism.

Within each area the report outlined the primary motivations of tourist segments which engaged with the theme as well as its key activities and unique selling points which tourists would be drawn to. The report also broke recommendations into 4 distinct working programs that would apply across themes: 1) Strengthening tourism planning and management; 2) Ecotourism products development and diversification; 3) Conservation linkages and monitoring measures; and 4) Marketing and site interpretation.

The 2022 Feasibility Report, while also emphasizing environmental sustainability in its structure and recommendations, also focused on social sustainability concerns of the valley. The 2022 report's direction involved addressing multiple gaps in current livelihood that limited long-term viability of the region, such as migration from villages to cities by young Albanians and inadequate growth opportunities for new ventures. In doing so, the Feasibility Study set out to act as a "lighthouse model" to impress and be replicated by other international destinations seeking to achieve similar development success.

The strategic direction of this Tourism Master Plan draws from these earlier insights, with a similar focus on sustainable tourism that supports the protection of the Vjosa Wild River National Park while stimulating local economic development through tourism. The target markets align with the above, but focus on markets that are high-value, low impact travelers, seeking unique natural and cultural experiences that are sustainable and provide local benefits. The profiles for these tourism markets are discussed in the next chapter and guide the recommendations and actions for the type of tourism products that can be developed in the region.

III. Diagnostic Assessment of the Tourism Sector

A. Situation Analysis of Tourism in the VWRNP & Surrounding Landscape

Of the total number of visitors who arrive in Albania each year for tourism, only a small percentage have historically sought out the Vjosa River Valley while in-country. Despite this, the valley is poised to build upon this success through its combination of natural features and mix of historical and living culture, all of which is in demand globally. To meet this demand, natural and cultural destinations including Gjirokaster, Circus Nemercke, Kelcyre Gorge, Narta Lagoon and Sand Dunes, as well as the Nivice Canyons and Waterfalls have become considered priority locations that can balance visitor expectations with local capacity, though many other locations do exist and can be further developed. See Table 4 for a list of major sites.

Site	Priority	Cultural, natural, or both	Notable events or features
Gjirokastra	Primary	Both - natural valley with UNESCO old town with mosque, bazar, and ethnographic museum	Gjirokaster Fortress, National Folklore Festival (every 5 years)
Circus Nemercke	Primary	Natural	Distinct 'armchair' shape and geological composition
Kelcyre Gorge	Primary	Natural	Spelunking and water activities, two caves, Black Water of Kelcyra cold spring, waterfalls
Narta Lagoon and Sand Dunes	Primary	Natural	Lagoon: Bird and Plant Area (e.g., flamingos), lagoon islands with a monastery, brackish water composition Dunes: innately notable
Nivice Canyons and Waterfalls	Primary	Both - natural features and strong heritage presence in ancient trails and rituals	Notable length (among longest in Europe), distinct cultural practices, important bird and otter habitat
Benca River Church & Aqueduct	Secondary	Cultural	Medieval structures (rebuilt)
Permet	Secondary	Both - primarily cultural built upon natural attractions	'Green' city of roses, strong folk music and literature heritage, Multicultural Permet Festival, <i>The City Stone</i> with ruins and view
Tepelene	Secondary	Both - natural region with	Panoramic view, Becishti Bridge, Ali

		multiple visitor areas	Pasha Castle, Taqueja of Kostan, Tepelene Cold Water, Ethnographic museum
Memallaj	Secondary	Both - natural region with visitor areas	Kalivac castle, Ylynec hermit cave, Ali Pasha Tepelene buildings, Dames plane tree natural monument, Derveni turnips
Selenice	Secondary	Both - natural with visitor areas	Armenian old town and church, Brat and Sklap bridges, Olimp 'Mavrove', Mountain Crown Sevaster, Ura e Frengu
Petranik Cave	Secondary	Natural	Spelunking activities
Kelcyre	Secondary	Cultural	Ali Bey archaeological palace ruins

Table 4: Sites of the Vjosa River Valley

Growth in interest in the Vjosa River Valley by tourists has been demonstrated in recent years. The combined attractions of Permet, Gjirokastra, and Tepelena, among the valley's more established tourism regions, welcome roughly 200,000 visitors annually in 2022. Their rate of growth has stayed more or less at 15% since 2015, indicating that despite not being a major destination for all visitors, the Vjosa River Valley's popularity is growing and awareness among tourists is increasing. Lodging infrastructure, at least in raw count, supports this conclusion. 20% of Albania's total number of accommodation establishments can be found in the area stretching from Fier to Gjirokastra. This coverage is notable, but also likely is explained in part by the region having smaller accommodation facilities and fewer high-room count hotels (i.e. large hotels) than other areas of the country, such as Tirana, as well as the relatively high populations of Fier and Vlore compared to most of Albania.⁴

Within these communities are many of the valley's cultural elements which are distinct to Albania and the Balkans. Remnants dating to Byzantine and medieval periods are among Europe's oldest, including notable structures such as the Churches of Sant Mary in both Ogdunan and Kosine, the Ottoman Babo and Limari Bridges, and Illyricum Fortress. Many of these sites, being religious in nature, are also the sites of cultural events which attract visitors both domestic and foreign and are sources of repeat tourism. Annual festivals include the San Padelimoni celebration and St. Mary of Kosina feast. Other heritage events are more modern, including a day of honor in Frashër recognizing the city's history as a hub for poetry and the lives of three patriot brothers of the Frashëri family. Numerous markets, celebrations, and other daily life elements further populate the region with distinct living culture for visitors to experience.

Outside of the valley's cities, major natural attractions including the thermal springs at Benja and the Langarica Canyons have been especially popular, leading to higher participation rates in the region's outdoor and adventure activities. Seasonal visitation, which is historically based in summer months, has expanded across a longer period as a result, from April to October, especially within the Upper Vjosa. Weekend getaway tourist numbers are also increasing, driven mostly by families but also by the roughly 5,000 adventure-seeking tourists who visit the valley each year.

Adventure tourism in the Vjosa River Valley is dominated by a number of activities, the most important of which include rafting, camping, hiking, swimming, and culinary opportunities. Other possible outings for visitors, but which are not considered as vital to the region's tourism, include kayaking and

⁴ Dr. Marta Muco, 2020

canoeing, fishing, caving, birdwatching, biking, climbing and canyoning. Each activity varies in its contribution to local livelihood and in its level of organization. Some examples, such as rafting and culinary outings, are more interactive between residents and often involve rentals, guides, or exchange of service. Other activities are considered more free and independent ones, such as camping and fishing, which as a result of weak regulation can be done almost everywhere along the river, although this will change with the creation of the park. See Table 5 for a full breakdown of major tourism activities.

Activity	Priority	Primary Area	Engagement	Level of Organization	Ecotourism Alignment
Rafting	Primary	Upper Vjosa - Permet and eastward	8,000 est. 2023	Operators include multiple licensed companies 6 local companies operating 7-person whitewater rafts	Weak - limited regulation and some impacts; individual rafters are allowed with no need for permission or guides
Camping	Primary	Throughout, usually along riverbanks	No data	3 licensed operators; but, also independent	Weak - no regulation against free camping
Culinary	Primary	Permet, Tepelene, and Gjirokaster	High, one of the most important existing activities	Organized mostly through restaurants and some tour operators	Strong, food is locally produced and sold to traditional standards
Hiking	Primary	Throughout, along the Vjosa and tributary rivers	No data	Yes, or also independent	Unknown, trails are mostly one-way and well established but no clear monitoring
Swimming	Primary	7 primary spots along the river	Limited, due to water temperature	Yes, or also independent	Unknown - limited engagement but also limited ecopotential as an activity
Kayaking/ Canoeing	Secondary	Near Tepelene, Kelcyre Gorge, and the village of Muzine Finiq	No data	Yes - mostly through operators such as Albania Rafting	Moderate - limited pollution potential and more direct engagement with operators
Fishing	Secondary	Throughout	Limited - primarily a local activity	No - largely independent, but operators in the summer for fly fishing excursions	Low - good community possibilities BUT poorly regulated and managed with potential damage to wildlife balance
Spelunking	Secondary	Kelcyre Gorge (east side)	No data	Unknown, but likely through operators due to safety concerns	No data

Table 5: Activities of the Vjosa River Valley

Increases in interest for such activities have led to investment in new accommodations, trails, and international guides. The NGO CESVI is also exploring the development of visitor centers in places such as Permet. However, a continuing lack of on-site information (e.g, signs, trail maps), facilities (toilets, parking, etc.), safety equipment, tour operators specializing in niche activities, and a generally weak communication channel for the region’s tourism stakeholders have been cited as limitations to growth in the long term. Similarly, not all activities are available evenly across the park or valley. Rafting, for example, is limited to stretches of the river where its water conditions allow for the activity to be done both with safety and excitement (Figure 4).

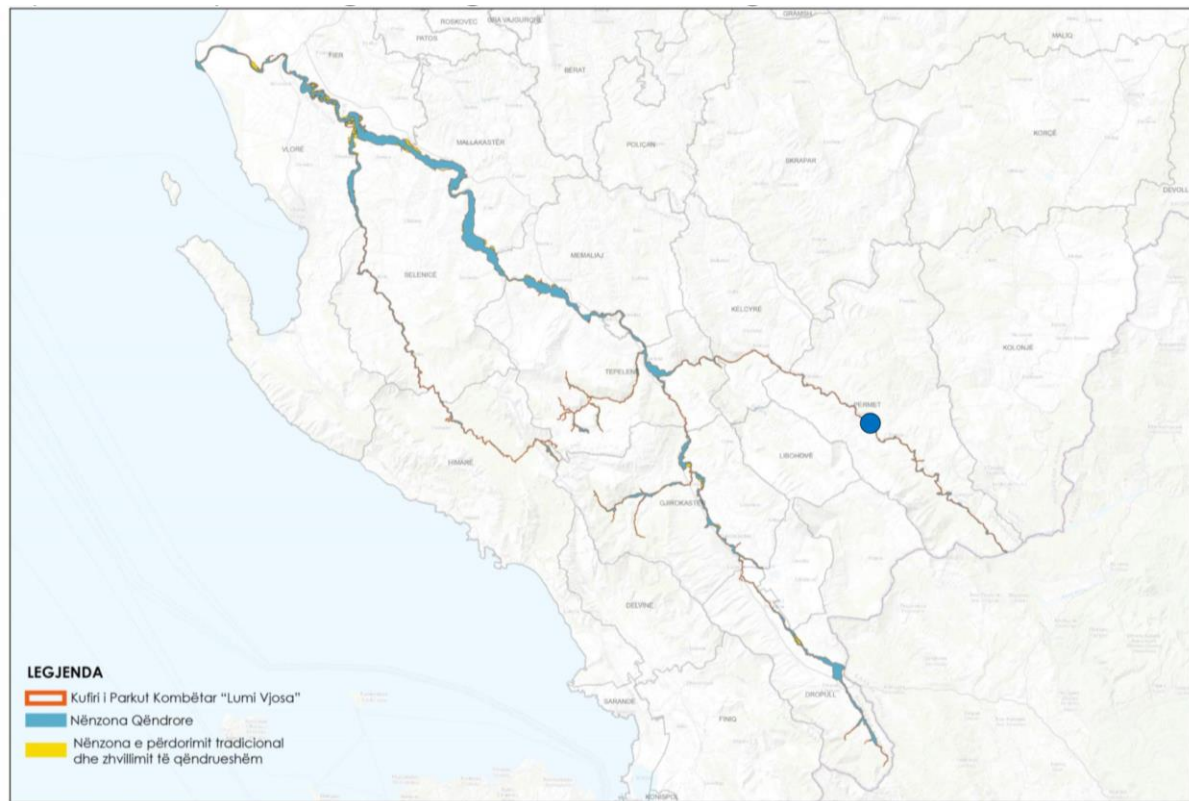


Figure 4. Location of rafting activities along Vjosa River Valley waterways.

Because regulation either does not exist or is not enforced, many activities and operators are also not currently aligned with the concepts of sustainability and ecotourism promoted in the establishment of the VWRNP. Considering that these elements are growing in demand among tourists post-pandemic, the lack of sustainable operations poses a potential barrier to long-term success for tourism in the Vjosa River Valley. Assessment of existing potential in past reports shows “extremely limited occurrences of what would be defined as an ecotourism activity [contributes to conservation, benefits local communities, and includes nature interpretation].” None of the activities which qualify as ecotourism are capable of supporting conservation financially or through volunteer-based practices. Many offerings that possess qualities suitable for ecotourism are present in the valley but have failed to attain viable ‘eco’ status due to combinations of marketplace undervaluation or suboptimal location. Products and services such as these stand to benefit greatly from greater administrative efforts in a number of key environmental areas including more effective waste management, reforestation efforts, and the overall reduction in extractive and depleting business practices.

The potential of nature tourism (tourism based on the natural attractions such as birdwatching, stargazing, camping, hiking and visiting parks) is additionally limited by the lack of quality infrastructure available to the users and practitioners of the tourism industry. Steps in recent years have been taken to address this gap, but are still limited in scope. Efforts have been started to establish

a Visitor Information Center in Tepelena and the establishment of a new traditional food incubator to support local heritage service providers as well as a number of new trails are examples of progress in the landscape.

Intangible infrastructure has also commonly been developed to support such projects, including a calendar of events and an online trail guide which are both made available to the public. Additional intangible infrastructure is still needed in a number of key areas such as business training, for example. A 2022 *Ecotourism and Sustainable Tourism: Concept Study* identified several fundamental gaps in the present offering of experiences by tourism operators and managers, including an overall lack of variety, an underpricing of services to be sustainable, and a general poor quality of service stemming from absent competitiveness.

B. National and Regional Tourism Context

Within Albania, the tourism sector is overseen primarily by the governmental Ministry of Tourism and Environment, which among its duties is responsible for the drafting and implementation of tourism policies, including those aimed at regulation and protection of the environment. This includes the wider Vjosa River Valley. Tourism in Albania as a whole has developed slowly but increasingly over the last 2 decades, aided by growing awareness of the Balkans as a tourism destination, regional recovery, and investment in accessibility through online booking platforms and air connectivity.

Tourism's growth has stimulated an increased focus on the sector in the country. In 2019, Albania launched a new National Strategy for Sustainable Tourism Development, set to run until 2023. A new national tourism strategy (2024-2030) is also in the early stages of procurement with the support of GIZ. Among the other elements stressed within the plans and critical to the development of the Vjosa River Valley is nature tourism and a subcomponent, ecotourism, defined as any activity with "an inherently meaningful human experience that is related directly to a particular outdoor environment - air, water, hills, mountains, etc." and its impact is measurable."

Data supports the conclusion that Albanian nature tourism will only continue to grow in demand. Over 7 million visitors arrived in Albania for the purpose of holidays, visiting relatives, etc. in 2022. An estimated 1.3 million visitors arrived in Albania for the purpose of nature tourism, a 23% increase from the same period only one year before.⁵ Among the most popular areas and sites for nature tourists in-country included:

- Korça: Prespa National Park, Erseka Glacial Lakes, Pheasants Forest, Vronomer Springs, Gjergjovica Valley, Pogradec Lake, Drenova Fir, Nika Stone
- Shkodra: Theth, Valbona, Gashi River, Lake Shkodra, Shala Valley
- Fieri: Divjakë-Karavasta National Park, Nartë-Pishë Poro
- Durrës: Rodoni Cape, Kavaja Rock, Ballabaneci Maple, Sarisaltik, Rrushkull, Krastë-Verjon
- Vlore: Butrint, Karaburun-Sazan, Llogora, Ksamil Islands, Blue Eye

In 2021, Mirela Kumbaro Furxhi took over as the current Minister of Tourism in Albania, coinciding with an April 2021 agreement by regional tourism ministers of the Western Balkan 6 (Albania, Bosnia & Herzegovina, Kosovo, North Macedonia, Montenegro, and Serbia) to the Tirana Declaration, a formal doctrine based around recovery of the tourism industry through support and growth of sustainable tourism practices. The agreement was prompted in part by deep regional dependence on tourism as an industry, with an average 15% direct contribution to GDP compared to a global average of 10.3%.

⁵ INSTAT Tourism Statistics 2022

In Albania, tourism has historically been even more impactful, contributing 21.2% to national GDP and directly responsible for 244,000 jobs in 2019, with 20% of employment nationwide linked in some meaningful way to tourism and travel-related activities. Of the 11 million international visitors (2019) to Western Balkan states, Albania’s contribution of over half of all arrivals (6.4 million) has been especially significant. 96% of which were overnight visitors. This figure includes not only tourists, who have historically been associated with sea and coastal destinations, but also business and transit visitors as well as long-term expats. However, as highlights previously, over a million are nature-based travelers.

Uncertainty over the lingering effects of the COVID-19 Pandemic on visitor numbers was amplified by the beginning of the Ukraine conflict in February 2022. However, despite a reduction of an estimated 70,000 Ukrainian tourists to Albania, the country’s tourism sector has proven resilient. Albania’s growth in visitation in 2022 was 30% above 2019, stronger than any country in the world with a population over 5 million people. This increase is in part due to the heavy reliance of Albania upon other Balkan and broader European source markets, which account for 91% of all tourists (Table 6). Also importantly, 70% of visitors to the country, both regionally and globally, are Albanian in origin. According to INSTAT, Albanian tourism has also been supported heavily by specific adjacent markets such as Kosovo, which contributes 45% of all total non-resident visitors. Many of these visitors will be for business and non-leisure purposes.

Country	Number of Arrivals (2019)
Other Southern European (e.g. Kosovo)	2,250,000
North Macedonia	754,000
Greece	597,000
Italy	468,000
Montenegro	367,000
Germany	166,000
United Kingdom	133,000
Poland	132,000
United States	119,000
Türkiye	92,000
France	73,000
Serbia	68,000
Switzerland	65,000
Bulgaria	46,000
Sweden	44,000

Table 6. Top 2019 source markets to Albania by total arrivals

C. International & Domestic Tourism Trends & Demand

Beyond the Balkans, the tourism industry is experiencing major changes in the decision making of travelers. These shifts reflect trending attitudes toward concepts of sustainability, particularly among top source markets relevant to Albania. Increasing arrivals from high-income European countries such as Spain, Italy, Belgium, and the Netherlands represent markets that have identified it as an 'off-the-beaten-path' destination with compelling natural, cultural and adventure tourism opportunities.

Recent decades have seen a revolution in leisure travel. Changes in consumer demand have disrupted the industry in fundamental ways. Although relaxation is still the primary motivator for leisure travel, with sun and beach holidays predominant, leisure travelers expect, and in many destinations, enjoy a much greater choice of activities and experiences. The increase in leisure travel choice and the development of new travel types and segments, together with societal changes such as increasing affluence, urbanization, and demographic changes will continue to affect the development of tourism in the Vjosa. A number of key global trends should be noted.

- Traveler needs are becoming more sophisticated and demanding more authentic, differentiated travel experiences.
- Small groups, bespoke and personalized travel experience are increasing in their importance.
- Affluent traveler demand has decisively shifted away from standardized travel experiences, towards 'life changing', unforgettable and transformational travel experiences, especially those with local community connections.
- Based on its 2022 study of over 30,000 tourists from 32 countries, the Booking.com Sustainable Travel Report found that 71% of global travelers say that they want to travel more sustainably over the coming 12 months, a 10% increase over the company's 2021 data (which also showed a significant growth from previous years). A study by Expedia and Wakefield showed that 90% of consumers looked for sustainable options when traveling, while a 2021 report by the World Travel & Tourism Council found that 83% of travelers surveyed will make sustainable travel a priority in the future.
- After decades of the concept of 'sustainability' being linked almost exclusively to travel and tourism's impact on the planet, the Booking.com 2022 Sustainable Travel Report found that the people aspect of tourism is of growing importance. The historical focus of tourism on green / eco aspects of its impacts was often linked to natural resource conservation, for example, waste, water, and energy management. Now, however, travelers want tourism not only to be 'green' (to benefit the planet) but also to be 'good' (to benefit local people and communities), including preserving cultural heritage (84%), the need for positive economic impacts for local communities (76%), and a desire for authentic experiences in travel (73%).
- Nature based travel has grown in importance with UNWTO recording that 40% of all international travelers have an interest in seeing wildlife. Experiential nature travel for wildlife enthusiasts continues to be a very lucrative market segment. Per the UNWTO, an estimated 12-14 million leisure trips globally have nature and wildlife as the primary travel motivation, a market which is growing at 10-12% per annum.
- Cultural and heritage travel remains a key segment. The UNWTO report Tourism and Cultural Synergies found that from the 69 member states surveyed 47% of international arrivals were 'cultural tourists'.
- Adventure travel has now become mainstream and is the fastest growing segment in tourism. Adventure travel is defined as the combination of an activity with natural or cultural attractions or experiences, by this definition the ATTA have estimated that 80% of all travelers will take part in at least one adventure travel activity during their vacation.
- Based on the Adventure Travel Trade Association's Annual Industry Snapshot Report (June 2023), it has been revealed that 68% of Tour Operators surveyed have already obtained or are actively pursuing some form of sustainability certification. This figure marks a significant increase from 45% reported in the previous year (2021). A challenge often cited by

international operations, however, is finding suppliers that are also certified, and so if the Vjosa Valley is to attract these markets, greater efforts are needed in strengthening the sustainability of the tourism sector in the region.

Comparing the pre-and post-COVID-19 pandemic visitor, there is an obvious difference in priorities and demands which present opportunity for Albania to build upon, particularly when it comes to four key traveler profiles:

C.1. The Nature Enthusiast Traveler

According to research from UNWTO, 4 out of 5 of all tourists have an interest in experiencing nature and seeing wildlife during a leisure trip. Nature enthusiasts are those that pursue their interest with intentional actions. Latest estimates place between 12 and 14 million trips taken each year in which nature and wildlife were the primary travel motivation, a number that is growing at roughly 10 to 12% year over year. As a segment, nature-based tourism is set to increase its economic market size from \$181.1B in 2019 to \$333.8B in 2027. As a pre-pandemic forecast, this is likely an underestimate.

Among all travelers, those who classify as nature enthusiasts:

- 33% are travelers who value opportunities to see rare and unique wildlife
- 29% are travelers who like to be able to get close to wildlife
- 25% are travelers who are attracted at least partly by a destination which has a large variety of wildlife
- 18% are travelers who would like to receive information about wildlife
- 80% are travelers who are eager to explore untouched landscapes, observe rare wildlife, and engage in activities that have a minimal impact on the environment

Travel Persona: Simon the Nature Sampler

Simon has always been interested in the world's natural diversity. With his kids now older and some money built up, he and his wife have time to explore again, and they enjoy seeking out natural environments that they cannot find at home. Often, Simon's decision on where to go is based on how different the geography, animals, and plants are. The Vjosa Wild River Park's promise of a journey from mountains to sea seems like a perfect opportunity to discover a whole country in one visit. Though he still wants to stay in real hotels, Simon is willing to sacrifice some comfort as part of the journey if it means seeing an authentic and wild Albania at his pace, choosing the activities that fit his schedule and easier lifestyle best.

Nature enthusiasts may also be further divided into sub-market profiles, many of which remain relevant for tourism to the Vjosa Valley. These profiles include:

- Dedicated ecotourists - tourists who prioritize ethical and sustainable travel choices, supporting destinations and initiatives that are aligned with environmental protection, biodiversity conservation, and sustainable practices including for local communities.
 - Notable Demographics: Millennials (born 1981 to 1996), Generation Z (born 1997 to 2010).
 - Notable Countries: Germany, Netherlands, France, Spain, Sweden, Belgium

- Wildlife and bird watchers - tourists who seek out interactions with animals as a primary or secondary motivation and prefer pristine habitats with quality of sighting experiences over more popular destinations.
 - Notable Demographics: Baby Boomers (born 1946-1964), Generation X (born 1965-1980)
 - Notable Countries: United Kingdom, Netherlands, Germany, Sweden, Italy, Spain, US, Australia
- Nature-based wellness travelers - tourists who view nature as a retreat and immersion opportunity and seek out activities in pursuit of rejuvenation and better well-being.
 - Notable Countries: Germany, United Kingdom, France, Netherlands, Spain, Italy, Austria, Belgium, Scandinavia (region).

Within the Vjosa River Valley, the most compelling attractions for this profile of tourist are the many notable biological, geological, and hydro monuments that have gained popularity among locals and international tourists, including many directly tied to the Vjosa River itself.

C.2. The Adventure Traveler

For these tourists, travel is an opportunity for physically demanding escapades set against a backdrop of untamed terrain. Adventure tourism has seen a comparable increase in popularity as a result of the pandemic and is now the fastest growing segment in tourism at 29% CAGR over the next decade. Growth is especially present among younger generation and group travelers, tourism’s largest market segment. Adventure travelers tend to have longer length trips, an average of 8 nights, and spend more, roughly \$3,000 per trip, compared to just \$1,100 for overnight package tourists, (source: IMARC Group, Global Adventure Travel Report 2023). Their trips are also commonly spread out across seasons, rather than limited to summer months. Most importantly, the potential for local impact is higher than many forms of tourism. Estimates of money staying within communities ranges between 60 to 76% with an average \$1,400 more contributed to the local economy than the overnight package tourist.

Travel Persona: Elena the Eco-Adventurer

Elena is an enthusiastic eco-adventurer, fueled by her love for immersive experiences in pristine natural surroundings. She seeks destinations deeply committed to safeguarding the environment and conserving biodiversity. The allure of Vjosa Wild River National Park lies in its dedicated efforts to protect unique ecosystems. Elena craves the thrill of kayaking, hiking, and spotting wildlife, all while witnessing the park's pivotal role in biodiversity preservation. Eco-friendly accommodations and educational programs that deepen her appreciation for environmental conservation are a must for Elena.

2022 reporting on adventure tourism by the Adventure Travel Trade Association provides valuable insight into the most important factors influencing the segment globally, many of which are relevant to development of the Vjosa River Valley. These factors include, ranked:

Top adventure traveler motivations:

1. New experiences
2. Off the beaten track
3. Travel like a local
4. Cultural encounters

5. Adventure as a status symbol
6. Wellness/betterment goals
7. Pampering and luxury
8. To go on popular adventures
9. Digital detox
10. Adrenaline rush/challenge

Top adventure trip type preferences:

1. Custom itineraries
2. Remote destinations/trails
3. Expert/specialist-guided trips
4. Slow travel itineraries
5. Green/low-impact itineraries
6. Solo travel
7. Family travel
8. Off-peak travel
9. Longer-durations
10. Domestic/regional travel

Trending top activity preferences

1. Hiking/walking
2. Cultural
3. Culinary
4. Cycling (mountain/offroad)
5. Safaris/wildlife
6. Wellness-focused
7. Cycling (electric)
8. Cycling (paved road)
9. Nature and wildlife photography
10. Birdwatching
11. Camping
12. Canoeing
13. Kayaking/sea/whitewater
14. Rafting
15. Climbing

Tourism within the Vjosa River Valley presents a range of options which cater to both hard and soft adventurer types. Non-motorized activities, particularly kayaking, hiking, biking, and rock climbing are especially powerful possibilities to build upon. While these activities will not all be applicable to the VWRNP and its unique protection status, the river's wild nature and the broader valley is likely to appeal to this profile's appreciation for truly untouched natural beauty.

C.3. The Culturally Conscious Traveler

More interested in people than nature (though still often interested in nature), these travelers seek out culture and history as their primary travel interest through activities including museums, historic sites, festivals, as well as art and culture experiences. Cultural travelers are among the largest market profiles in tourism today - roughly 47% of all tourists, according to the UNTWO. While motivations vary, for many a primary desire is to meet and exchange worldviews with people in a destination, learning along the way by experiencing traditional lifestyles and supporting sustainable practices regardless of potential language barriers.

Travel Persona: Sharon the Cuisine Enthusiast

Sharon has always enjoyed learning about new foods from around the world. Now that she is older, she uses travel to visit those who make food best, hear their stories, and bring it home to her kitchen. The Vjosa Wild River National Park is interesting to her, but she also wants to travel beyond the river into the towns and villages to enjoy Albania's many wines, rakia, fruit, meat, and cheese products, maybe during a local festival. Sharon hopes to participate in cooking classes and maybe forage for ingredients as well. She does not have a budget, but still wants to spend her money on activities that bring her closer with local people. Of course, she will also have to buy handmade souvenirs for family back home, too.

Pre-pandemic research into cultural tourists revealed the start of many trends and preferences which have only grown stronger as tourists have returned to traveling abroad. These include:

Important motivations for cultural travelers:

- Learn from new places, people, and experiences
- Engage with diverse activities across several places
- Support locally and create positive impacts
- Enjoy nature and scenery
- Eat and learn about food/drink
- Relax, restore, learn and contemplate
- Check off bucket list destinations

Favorite activities of cultural tourists:

1. Visiting well-known historic sites and buildings
2. Visit architecturally significant buildings
3. Learn about the traditions of the area
4. Visit handcraft markets
5. Take part in architectural/cultural tours
6. Attend performances
7. Attend cultural festivals
8. Visit tribal/indigenous people and their villages
9. Visit a UNESCO World Heritage Site

The Vjosa River Valley has developed a strong foundation of tradition and heritage to which many cultural tourists will be drawn. The region's deep roots spanning prehistoric, medieval, and modern legacies has left sites and experiences offering something for most types of social travelers. That said, certain activities, particularly skill exchanges in the form of souvenirs, gastronomic courses and workshops, and local lifestyle experiences including homestays have all seen especially strong growth in recent years and are particularly well-suited to the strengths of the valley.

C.4. The SAVE Traveler (Scientific, Academic, Volunteer, and Educational)

The SAVE tourist profile is itself a combination of four subgroups which are motivated by similar motivations of gaining knowledge and contribution back, even as their specific activities differ. These subgroups include:

- Scientists - young to mid career professionals who seek to participate and develop long-term relationships with the destination, returning regularly.
- Academics - both university students and young professionals, traveling for a specific topic but not necessarily on the basis of repeat visitation.
- Volunteers - those who travel to participate in community and conservation projects, staying longer than most but with lower expenditures.
- Educational trips - usually group travelers and often of school or university age, but with greater structured itineraries than academics or scientists.

Travel Persona: Carlos the Volunteer/Academic traveler

Carlos is an unwavering conservation advocate, traversing the world with purpose. Vjosa Wild River National Park's pivotal role in preserving a vital river ecosystem draws him like a magnet. Eager to make a tangible impact, Carlos embraces volunteer opportunities, spearheads habitat restoration, and actively engages with local communities. Accommodations that align with his values become a retreat after a day of conservation work and a place to hang out with others in his group. Carlos views his visit as an opportunity to leave an indelible positive mark, amplifying the park's conservation legacy. He can also use the experience to further his academic interests (sometimes for academic credit).

In addition to the SAVE opportunities that will emerge with the development of research and knowledge centers tied to the VWRNP, two other sub-markets of this profile - astro tourism and photographic tourism - have demonstrated strong growth among audiences globally. Given the natural attraction of the Vjosa River Valley both on the ground and in the skies, these areas should also be considered as having potential relevant to the region's strengths.

D. Tourism Enabling Environment

In order to achieve the goals and fulfill the actions required, the Master Plan also considers the enabling environment for tourism development in the Vjosa Valley. The main actors in enabling tourism investments, enterprise development and the growth of the labor market are national and regional governments. Other actors can include NGOs and donor agencies providing assistance to enterprise development and training.

The goal of an enabling strategy is to utilize existing support measures, recommend additional enabling actions, and also to consider any obstacles or restrictions which are unnecessarily limiting tourism development. Normally an enabling strategy considers the liberalization of restricting

regulations, but in the case of Vjosa some tightening or restriction of tourism related regulations are also required, in order to protect the ecology character of Vjosa River and to enable the transition of current high volume low budget tourism to higher value, lower impact tourism.

Support for Vjosa River Valley tourism in the form of an enabling environment arrives through multiple channels. Arguably the strongest of these are the tools, services, and programs designed for businesses. Both in the valley and across Albania broadly an increase in partnerships has connected businesses with international associations tied to more sustainable and high quality tourism. A specific case for the adventuring sector, in which the University of Sports in Tirana has collaborated with the World Rafting Federation on training initiatives for rafting guides, demonstrates the usefulness of these partnerships in the exchange of relevant knowledge and skill sets.

Food-based collaborations also highlight the ability of Vjosa River Valley residents and beyond to enhance the capacity of their offerings. The Slow Food Alliance, a foundation helping culinary businesses transition toward more selective and higher-standard products, entered Albania in 2015 and has grown to include 21 chefs across the country to date. These partnerships are in addition to direct and indirect channels already connecting local food heritage providers and production infrastructure within the valley.

Furthermore, examples of the enabling environment for businesses extend into sustainability initiatives which coexist as policy and regulation by the Albanian government and beyond. 'Balkan Green', from its website described as a "long term development process for the region", acts as a resource for educating businesses on how to attain globally recognized ecotourism and sustainability certifications which will empower them long-term. The initiative covers more than Albania alone, offering a network that connects the country with other practitioners in Bosnia and Herzegovina, Montenegro, North Macedonia, and Slovenia, along with other Balkan states (potentially) in the future.

IV. Analysis & Opportunity Prioritization

A. Tourism Planning Framework

To achieve the objectives of the Tourism Master Plan and foster tourism growth and revenue in the Vjosa Valley, a comprehensive framework will be developed to guide future investments and actions. The actions of this framework are outlined in more detail in the Recommendations and Actions section of this document and will be centered around the concept of strengthening "Visitor Hubs" which entail specific geographic areas within the valley.

Local tourism organizations, such as destination marketing organizations (DMO's) are a key component of the development of tourism hubs, but the framework goes beyond a single organization to look at all of the components needed to plan, develop and manage tourism in a location.

The visitor hub locations will play a vital role in developing and strengthening tourism in the region, and will concentrate tourism development in specific, already urbanized areas. Defining specific 'Visitor Hubs' should be done through a community engagement process (see recommendations in Marketing & Branding), but may include the following locations and themes:

- Gjirokastra region - The Stone/Culture Hub
- Permet & Kelcyre - Adventure Hub
- Tepelene & Fier area - Art & Craft Hub
- Vlore - Coastal Wildlife Hub

Visitor Hubs will connect via 'spokes' that reach to the park and other natural and rural areas of the valley for tourism activities, recreation and experiences. These will be lower impact activities, with any significant development focused in the Hubs, leaving the park and surrounding areas in as pristine a condition as possible.

Each Visitor Hub possesses distinctive natural and cultural values that attract visitors, offering diverse types and levels of tourism-related experiences and facilities. Moreover, every Hub has a set of purposes and objectives to guide site-specific actions identified in the tourism plan and future planning endeavors. To effectively implement this framework, the Visitor Hubs may be structured around six categories of investment and action:

1. Services Hubs
2. Visitor and Cultural Centers
3. Visitor Experiences
4. Visitor Infrastructure
5. Interpretation
6. Private Investment

Exploring the opportunities for future investment and actions within each hub will be further examined in section V, enabling a more detailed understanding of how to deliver on this framework. It is essential to establish clear definitions for each area, ensuring a shared understanding among stakeholders for effective planning purposes.

The Vjosa valley and river are also connected to Greece and opportunities exist to connect and package tourism hubs there with those in the Vjosa valley region of Albania, stimulating cross border

tourism and further expanding on the experience visitors can have along the whole stretch of the river.

By aligning efforts through this planning framework and investing in the identified Visitor Hubs and connections with other tourism destinations, we can maximize the potential of the Vjosa Valley as a thriving tourism destination while preserving its unique natural and cultural heritage. Well-crafted policies and regulations for the VWRNP and Vjosa valley will also be critical to establishing a conducive setting for sustainable tourism.

B. Vjosa Valley-Wide Approach to Thematic Interpretation

Effectively communicating the universal significance of VWRNP and the valley in which it lies is important to educating and informing local residents as well as providing context and learning opportunities for visitors to the region.

This overarching messaging and methods for informing visitors and residents about the park are detailed in the Interpretation and Visitor's Experience Plan, compiled in a separate document as a part of the overall Integrated Management Plan for the park. This program revolves around creating an enriching, educational, and accessible experience for every visitor. A state-of-the-art visitor center in Tepelena will act as the program's cornerstone, offering interactive exhibits and staffed by well-informed interpreters. Essential information stations will be strategically placed in Vlora and Permet, guiding visitors entering the Vjosa Valley.

Interpretation points along the river will provide interpretive trails and panels, ensuring a close connection between visitors and the river's essence. A wide spectrum of Interpretative and Educational activities will be offered to the visitor interested in learning about the park. In the digital age, mobile apps and interactive websites will empower visitors with self-guided tours and a wealth of educational content. All personnel, especially guides, will undergo training in the park's natural, cultural history, and sustainable tourism practices. Embracing the local culture, the program will support the local community enriching the experience for everyone.

Interpretive Premises

The Vjosa Wild River National Park is an IUCN category II protected area and is only the Vjosa river, its tributaries and all those geomorphological distinct areas in which water and gravel is stored to support the fully natural flow of the river. Higher elevated plains, slopes with grazing and forest vegetation, astonishing mountains and human settlement of the "Vjosa Valley" are left out of the national park boundaries, but are a part of the overall visitor experience.

The interpretation for the valley therefore includes the national park and the border valley. For the park, the emphasis is on the natural values of the last undisturbed large river in the Balkans, but also to influence people's perception that this river needs and deserves stricter protection. Other interpretative contents, including linkages to cultural and archaeological heritage, landscape values and traditions, other natural features, culinary heritage, etc. are presented in the context of the wider 'Vjosa valley'. The valley is also the area where the needed infrastructure for visitation and enjoyment of the visitors is to be developed.

V. Recommendations & Actions

The Vision & Goals

The Vjosa Wild River National Park stretches along 400 km of untamed waterways, hosting over 1,000 species and 300 cultural monuments as it winds from the Greek border to the Mediterranean Sea. Many communities live in the valley that cradles the river and park, which has been a part of their heritage for generations. The unique wild and scenic nature of the park and valley are increasingly of interest to visitors who want to share in the serenity of the park and the people and culture that surrounds it. Local communities also want to share their region with others and in doing so help to enhance their local employment and economic benefits, fund the protection of the park and celebrate local cultures.

However, as with inviting anyone into one's home, the community asks visitors to follow five simple tenants:

- Respect one's hosts and the cultural practices of the region
- Bring the baggage that holds your clothes, and leave all other types of baggage at home
- Protect the natural environment of the valley, leaving only footprints and taking only photos... as well as of course, some local souvenirs
- Enjoy the unique, scenic, tranquil and adventurous landscape and help make sure your children can return to do the same
- Respect other visitors to the landscape so that they can enjoy it as much as you

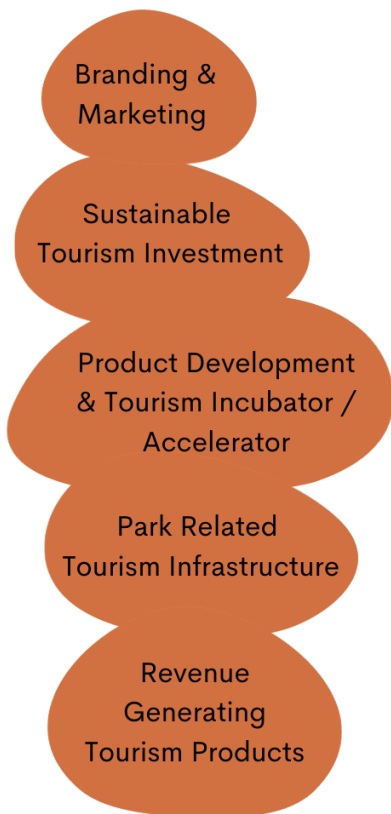
These are the tenants that visitors are asked to adhere to when visiting the Vjosa Valley, and also the guiding principles for tourism development in the valley, with a focus on establishing high quality, high value, low impact tourism. The type of visitors the valley seeks to attract are therefore those that seek out sustainable, nature-based tourism experiences where they can engage with local people in meaningful ways that benefit both visitor and host, while protecting the environment of the valley.

This market is therefore the focus of the Tourism Master Plan recommendations. Recommendations are divided into three 'Pillars,' Financial, Human Capital and Governance & Policy, all of which support Sustainability as the core foundation for tourism in the landscape (Figure 5).

A. Sustainability



B. Financial



C. Human Capital



D. Governance & Policy



Figure 5. Structure of Recommendations

A. Sustainability Pillar

Sustainability is at the core of the vision for the Vjosa Wild River National Park and the valley in which it flows. This includes protection of the core river ecosystem and fostering sustainable development and ecosystem services for the river in the surrounding environment; inclusion of the communities that are connected to the river, to ensure they are a part of process for development of the region; and enhancement of the economic benefits that local communities derive from tourism in the valley in ways that also enhance the ecological systems of the landscape. To address these needs, three core actions are recommended under this chapter, a focus on establishing a framework for **certified sustainable tourism** in the landscape, a **valley wide organization** that can manage tourism throughout the region and systems to ensure the **local community** are a central part of proposed actions.

A.1. Environmental Sustainability - Becoming a Certified Sustainable Tourism Destination

To put into action the vision that the valley become a model sustainable destination, the long-term goal for the park and valley is to become a certified sustainable tourism destination, through a Global Sustainable Tourism Council (GSTC) accredited certifying body. This process will likely take at least ten years, so there are also a number of shorter-term steps proposed that can help the region move towards this long-term goal.

The first step is adopting 'Leave no Trace' principles for the park and valley, that include education for tourism and park staff as well as awareness for the broader public. This will culminate in becoming recognized as a 'Gold Standard Site' by the Leave No Trace organization. This will focus initially in the upper and middle parts of the river and then flow to the lower section, where the program may need to adapt to the more mass-tourism realities that exist in this area.

In parallel programs can be established to develop standards, guidelines and incentivise businesses (existing and new) to adopt sustainable practices and technologies, based on the GSTC criteria for sustainable firms. As a medium term action, a Vjosa Quality Management System (QMS) and VWRNP Quality Mark will be established that provides a local system through which businesses can be recognized as adopting sustainability initiatives in the valley.

Action A.1.a. Leave no Trace:

Leave No Trace ([LNT](#)) is an internationally recognised nonprofit organization that is dedicated to protecting the outdoors by teaching and inspiring people to enjoy it responsibly. The movement was founded in the US through a collaboration of the US National Park Service, United States Forest Service, and the Bureau of Land Management in response to ecological damage caused by wilderness recreation. LNT offers educational resources to teach ethical behaviors which minimize harmful impacts for a wide range of ecosystems and outdoor activities, organized into seven principles.

1. Plan ahead and prepare
2. Travel and camp on durable surfaces
3. Dispose of waste properly
4. Leave what you find
5. Minimize campfire impacts.
6. Respect wildlife
7. Be considerate of other visitors

Leave No Trace training should be the minimum requirement for all Park or Foundation (see section A.2.) staff as well as permit holders and their staff who operate within the park or on Foundation managed lands. The LNT principles should also be taught to local outdoor activity providers and communicated to visitors in the Vjosa valley.

There are three levels of certificated training provided by Leave No Trace. The basic level is **Awareness** training which lasts from 2 hours to one day and can be conducted online at no cost. This is recommended for general awareness within the community and tourism businesses in the valley. The next level is a **Trainer** certificate which takes two days and one overnight in the field. Trainer accreditation allows holders to provide awareness seminars free or for profit. This is recommended for Foundation staff and permit holders.

The highest level of training is **Master Educator**, a 4 -5-day in person course including a minimum of two nights spent in the field. Master Educators can provide Trainer and Awareness certificates. This is recommended for at least five Park/Foundation staff and others in the community (tourism practitioners, such as representatives of rafting companies) so that they can train and certify others in the destination.

Instructors for this course can be provided by NOLS (National Outdoor Leadership School - <https://www.nols.edu/en/about/about/>) a non-profit organization that provides outdoor education and wilderness expeditions. The organization offers courses in environmental ethics, and technical outdoor skills, wilderness medicine, risk management, judgment, and leadership.

Steps to success:

- It is recommended that NOLS are contracted to come to Albania to train at least 12 Master Educators in the Vjosa Valley; these educators can then provide a series of annual ‘trainer’ courses for tourism businesses and public seminars for locals and visitors. The certified LNT Master Educators training should include park rangers, Foundation tourism officers, guiding instructors, outdoor adventure businesses and NAPA staff.
- Park/Foundation offers one day or half day LNT awareness training days for schools’ and youth groups and local tourism businesses
- Park/Foundation offers annual Leave no Trace Trainer certification courses for its staff and permit holders and other interested businesses (staff)
- Develop and install LNT informational signage to guide visitor behavior in and around the park.
- Coordinate stakeholders to create a Leave No Trace Destination Network, similar to the destination LNT networks in Ireland and Denmark.

Location	Priority	Time to implement
Park & Valley	Short Term / High Priority	Initiation 2024-2025, then ongoing program

Action A.1.b. Quality Assurance Program - ‘Vjosa Quality Mark’

As a localized step towards sustainability, the Vjosa destination will develop a quality assurance classification and certification scheme, the **Vjosa Quality Mark**, for tourism and tourism related businesses in the landscape. The quality mark will be a sustainability and quality label awarded to businesses attaining basic, intermediate or excellent standards in sustainability and quality. The classification implies an endorsement of the business by the Vjosa Foundation or park and is determined by the level of quality assurance certification achieved. For accommodation providers, the classification will partly reflect existing mandatory classification of accommodations in Albania (Order No. 267 “On the approval of the regulation on the way, criteria, and the procedure for the categorization of accommodation facilities”), but will also include additional sustainability and quality criteria.



By meeting the criteria, businesses gain the certification’s label that they can use as an independently verified badge of validation for their business. Certified businesses can be packaged together in sustainable tourism itineraries and promoted by the Foundation and other partners. Products such as crafts can also be sold in the visitor center and through other Quality Mark participants (e.g. hotels, restaurants). The label can be used by certified businesses in their marketing and promotional materials. Businesses operating in the park will be required to have a badge.

Integration of these actions will be achieved through the establishment of a Quality Management System (QMS), a set of interrelated or interacting actions which will achieve destination sustainability and quality objectives for tourism products as well as related businesses such as crafts and souvenirs. These include enhanced experiences and services tailored to higher spending markets, sustainable business practices and effective risk and safety management. The QMS will be offered to all tourism businesses in the region, such as accommodations and tourism services. Quality management actions will include training programs, investment incentives, and a brand.

Examples of criteria may include:

- Each business should be legally registered in compliance with Albanian tourism law
- Representatives of the business have completed product development and business training courses provided by Vjosa Foundation
- Initial steps towards sustainability (e.g. program to eliminate/reduce single use plastics, water management schemes, local purchasing and menu sustainability programs, etc.)
- For the top standard the business has achieved accreditation from a GSTC approved Green Tourism program such as GSTC, Green Step and Green destinations

Steps to success:

- Draft guidelines & standards for Vjosa Quality Mark through expert and community consultations
- Vjosa Quality Mark brand, collateral and program materials developed
- Campaign within the valley to inform people about the program and build adoption of the program
- Training program for interested businesses to become certified by the Vjosa Quality Mark

Location	Priority	Time to implement
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Valley	Medium Term / Currently Medium Priority	Initiation 2026-2027, then ongoing program
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Action A.1.c. GSTC Destination Certification

The Global Sustainable Tourism Council (GSTC) provides a common set of criteria that represent an international standard of sustainability which can be independently monitored and acknowledged (by GSTC recognised certification bodies). The criteria provide the guidelines for a Vjosa Foundation to support the valley to become more sustainable. They also provide potential visitors with the assurance that the destination operates at a high level of sustainability and is a strong distinguishing factor in the market, especially with an increased demand among travelers for sustainability.

The GSTC Destinations Criteria are organized around four main themes:

- Sustainable management;
- Socio-economic impacts;
- Cultural impacts;
- Environmental impacts (including consumption of resources, reducing pollution, and conserving biodiversity and landscapes).

More on the criteria for destinations can be found [here](#).

Actions A.1.a and A.1.b are intended as specific actions to improve the sustainability of the destination in the shorter-term, and take initial steps towards destination sustainability. To achieve long term sustainability, the Vjosa Foundation should use the criteria as their guidelines to develop an GSTC action plan. This should be developed in parallel to the development of the Vjosa Quality Mark, so that they are all alleged, however the implementation of the GSTC action plan will be over a longer period of time.

The action plan will provide additional programming for businesses, sites and attractions to educate and build awareness on sustainable techniques, guide policy as well as measure impact so that the Vjosa Foundation can ultimately obtain certification as a sustainable destination. Direct engagement with GSTC and/or its implementing partners once the first initial steps have been taken (A.1.a and A.1.b), will help to guide these longer-term steps. Some additional initial actions are also listed below.

Steps to success:

- GSTC action plan development
- Climate mitigation and adaptation plan
- Develop guidelines and incentive programs for constructing and renovating structures using green building principles or other green business practices. Incentives may include fastrack planning approval and cadasta registration, tax holidays, loans and grants
- Training for all partners on GSTC standards and local implementation
- Waste management & sustainable consumption program for the valley

Location	Priority	Time to implement
Park & Valley	Long-term / Currently Low Priority	2026-2033

A.2. Vjosa WRNP Foundation

According to GSTC Destination Criteria, the Vjosa River Valley destination requires an effective organization responsible for a coordinated approach to sustainable tourism in the region. This entity should include the involvement of government/public sector, the private sector and civil society. This body must have defined legal responsibilities, oversight, and implementation capability for the management of socio-economic, cultural and environmental issues. The organization must be adequately funded, work with a range of bodies in delivering destination management, has access to sufficient staffing (including personnel with experience in tourism and sustainability) and follows principles of sustainability and transparency in its operations and transactions.

It is therefore recommended that a Vjosa WRNP Foundation be established (The Foundation) that would fill this organizational need for the destination. The Foundation would be the central body to drive sustainable tourism, destination management and marketing as well as other functions relating to park management and conservation. It would have a strong community focus, providing a forum through which the community can learn about sustainable tourism, provide opportunities and incentives to develop sustainable tourism businesses and support public services such as sustainable transportation within the valley.

The Foundation, along with NAPA, would also be the main implementing body for this Tourism Master Plan, building on the board plan with valley wide zoning of tourism (tourism Hubs) and non-tourism zones and sites specific planning to develop appropriate tourism sites. The Foundation would also provide a monitoring role to ensure tourism is developed in a sustainable and community inclusive way.

An advisory committee should be established that initially guides the creation of an action plan for the development of the Foundation and then oversees its implementation to formally create the foundation. This will include review of the most appropriate structure for the organization (e.g. government owned foundation, PPP, etc.). The committee should consist of the government (led by the Ministry of Tourism and Environment and NAPA), major financial supporters (such as Patagonia and IUCN, possibly also donor organizations), tourism private sector stakeholders and local civil society representatives.

The Foundation will be structured to include a unit for park management as well as a tourism destination management & marketing unit for the park and valley. The organization will be founded based on four pillars of sustainability, supporting actions in each of these areas (Figure 6). A detailed business and operations plan for the Foundation, including its park and tourism activities is needed to provide a roadmap for the long-term sustainability of the organization and its efforts.

As a part of the business & operations plan, the advisory committee will also be responsible for identifying and securing funding to support its establishment and long-term operations of the Foundation. For more information on indicative revenue for the long-term financial sustainability of the Foundation and park operations, see the section of this report on 'Consolidated Park Business Model.' This tourism master plan, along with other planning documents relating to the park and surrounding valley will form the longer-term plan that the Foundation will be responsible for implementing.

The Foundation will have an Executive Team as well as Park Management team and Destination Management and Marketing team. It is proposed that the Destination Management and Marketing team consist of an initial staff of seven individuals, including:

- Tourism/Commercial Director - overall management of the unit

- Permits, Concessions and Revenue Officer - responsible for managing tourism concessions, permits and revenue generating agreements with partners and within Foundation sites (e.g. visitor centers, etc.)
- Marketing officer - responsible for promoting the valley and park as a tourism destination
- Tourism Officers (3) - One each for upper, middle and lower river with responsibilities to check permits of those entering the park, respond to visitor needs and be the main point of contact for local tourism organizations (the number of Officers may expand in the future)
- Retail and Partner Engagement Officer - responsible for managing the retail program for the Foundation and Quality Mark implementation and partnerships

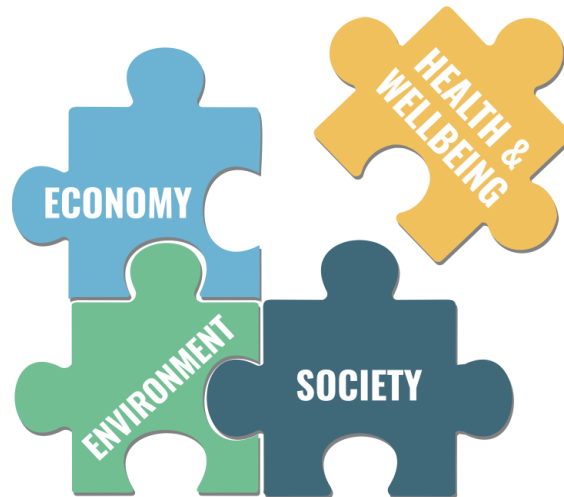


Figure 6. Sustainability quadruple bottom line⁶

Within the executive team there may also be a communications officer and community outreach/training officer that will lead and support community engagement and training activities for the Foundation.

Action A.2.a Development of the Vjosa Foundation Commercial Services Program and Business Plan.

In line with the goal of generating revenues to support park protection and sustainable tourism in the valley, the VWRNP Foundation will need to develop a commercial service program and a comprehensive business plan, integrating tourism opportunities with other income streams (for example for Ecosystem services, if any are permissible).

Commercial Services

The management of tourism products and services, income generation and business development should be managed through the DMMO team. Commercial Services will include all commercial visitor services in territory controlled by the Vjosa Foundation, not only VWRNP but also utilizing other non-productive (non-agricultural) state-owned land which could be managed by the Foundation, in order to generate income for conservation and enhance the visitor experience. These plots of land would need to be identified throughout the valley (see B.2), including identification of the agency that holds title. These plots of land would be bundled into one 'packet' for transfer to the Ministry of Tourism (or NAPA) through a single decision from the Council of Ministers. The Ministry/Napa would retain ownership of the land, but transfer management rights to the Vjosa Foundation. The Foundation could

⁶ Source: W.M. Purcell and M. Nikolova. 11/18/2021. "WORKING PAPER SERIES: Pursuing Sustainability in the Travel & Tourism Sector From a Triple to a Quadruple Bottom Line Sustainability: The Case for Adding 'Health and Well-being' to Sustainable Travel and Tourism".

then rent this land to targeted sustainable tourism businesses or for public use activities (as defined later in this Master Plan), generating revenue from the rent.

Commercial services may include third party local businesses authorized by concession contracts, commercial use authorizations (CUAs), and leases. A wide range of activities and services could be provided through the program.

Revenue Models

In addition to providing in-house products, activities and services the Foundation can utilize and support the local private sector to develop enhanced visitor experiences and generate income.

A **concessions operation** is a way of providing commercial visitor services such as food, lodging, and retail through a third party (concessioner) within Foundation managed lands. These services must be necessary and appropriate for visitor use and enjoyment. Concession contracts are generally valid for 10 years or less but can extend for as many as 20-30 years, depending on the level of investment the business will need to make on the land. Concession contracts and CUAs specify the range of facilities, accommodation, and services types the concessioner agrees to offer. By welcoming the private sector as a partner in supporting the park, the foundation can also broaden the economic base of the valley and the communities surrounding the protected area.

Commercial use authorizations are granted to private businesses to permit small-scale commercial activities. CUAs may be issued to authorize services that: are appropriate to the foundation's vision and goals, will have minimal impact on preservation of the protected area, and comply with all applicable management plans, park policies, and IUCN regulations.

Leases can be issued for Foundation managed land or properties. Leased property must be used for an activity and in a manner that is consistent with the purposes established by law for the park. Leases should be issued for rental rates that are at least equal to the fair market value of the leased property. Leases can be issued for up to 60 years in order to provide a viable leasing opportunity in light of investment requirements and other relevant factors.

Park and Valley in-house tourism products can also be developed by the Foundation. These tourism products would include experiential, participatory conservation experiences which require expert facilitation, as well as activities and experiences which can be hosted at the Park Visitor Center. Such offers may or may not require commercial suppliers as part of the delivery, but they would be Foundation branded and managed. (See also B.5.).

Business Plan Development

It is imperative that one of the first actions of the Vjosa foundation is to develop a comprehensive tourism business plan, with the following elements.

1. Vision - What will the commercial services at Vjosa achieve? What are the commercial goals or status to be attained? (What does success look like for the commercial services team in 10 years time?) This should be developed in-house by all commercial services staff
2. (Commercial) Mission - A public statement of what Vjosa Foundation offers to visitors and why Vjosa Foundation does it so well, what makes those offers so compelling?.
3. Market demand analysis, matching Vjosa's offers with target markets. This section should include a detailed psychographic analysis of target consumers. What inspires them to travel? How do they travel? What are their wants and needs during a visit? Where are they located? How can they be reached, (what media channels do they use)?

4. Competitive Analysis of Vjosa’s tourism offer. How do the tourism offers match or exceed competing destinations , what are the shortfalls, product gaps in the tourism offer? What value does Vjosa offer a visitor, compared to similar destinations?
5. Financial Plan - detailing financial goals, estimated investments, fixed and operating costs, product pricing and profit margins, as well as financing sources and costs
6. Actions to meet defined goals and deadlines
7. Key Performance indicators
8. Timetable for review and updates to the business plan.

The business plan is essential for securing investment and financing. It will also guide and direct the actions of the Commercial Services Team. The Vjosa Tourism Business plan should be developed together with the commercial marketing plan.

Steps to success:

- Establish Foundation advisory committee
- Develop Foundation business and operations plan, including financial plan & funding strategy
- Define potential land for transfer to the Foundation (see also B.2.)
- Registration and legal formation of Foundation

Location	Priority	Time to implement
Park & Valley	Short Term / High Priority	2024

A.3. Community Inclusion and Participation:

A core pillar of the Vjosa Foundation is community engagement in the protection of the park and sustainable economic activities that can be fostered in the valley. Once the Foundation is established, it will support many of the activities outlined in this strategy, including facilitating regular consultations with local community stakeholders to ensure social and economic efforts are driven locally. The Foundation, however, will take time to establish and the community engagement that has been initiated through this planning effort will need to continue in the short-term so as not to disenfranchise the community of the valley.

Action A.3.a. Maintaining Initial Community Engagement Efforts

Short-term activities that maintain and build on community engagement efforts to date should continue with regularly scheduled community communications to inform community members about regional efforts and activities as well as periodic meetings in key community hubs (at least every 6 months). Community include local residents, tourism professionals, local government, civil society, academia, etc.

These meetings will be informational, but also have practical focus. The first practical focus will be on engaging the community in defining the brand and stories of the region that will help to attract targeted high-value visitors to the valley. This will support the efforts of the marketing activities (B.1.), and be led collaboratively by the communications, community and marketing staff members of the Foundation.

A community committee for each of the three regions of the valley (upper, middle and lower) will be established that will advise and potentially have a decision making role in the Foundation’s plans and

actions. Each committee will consist of local government & municipalities, tourism private sector, and civil society from each area. This committee will help to spread the word about the Foundation/Park activities, provide local insight into needs and issues as well as support community engagement efforts.

Steps to success:

- Establish communications strategy for regular community updated (newsletter, What’s App, local radio & other channels)
- Schedule regular community engagement sessions in the communities (every 6-month minimum)
- Community Session 1 focus: brand and stories of the region
- Community Session 2 focus: review and feedback on brand and story strategy
- Establishment of formal regional community committees, with decision making role within the Foundation

Location	Priority	Time to implement
Valley	Short Term / High Priority	2024

Action A.3.b. Longer-Term Community Programing

Once the Foundation is established, it will pick up community communications and engagement efforts, continuing with regularly scheduled meetings as well as communications outputs for the community. In addition, community-led events and festivals will be supported (ideally building on existing events/festivals) that celebrate the park, regional culture and other activities that strengthen the connection between the park staff, support organizations in the region (NGO's, etc.) and community stakeholders. These activities can also be used as ways to promote the region to potential visitors (See B.1.).

Whereas community engagement efforts in 2024 focused on the brand and stories of the region, community engagement efforts in 2025 will focus on regional zonal planning, with a concentration on tourism zones within the valley that ensure the long-term protection of the park and the valley ecosystems. This would be connected to the concept for development of tourism hubs (see Visitor Planning Framework section). These efforts will help to build on actions initiated in 2024 (people see action) to further the conversations about what type of tourism should happen within the valley and where it should occur. The tourism zoning effort should be expert-led to help define initial thoughts on zones and activities, but should have a strong community engagement component gathering input and guidance at the local level. This will complement other efforts on spacial planning for the park. Tourism zoning will focus on a hub-and-spoke model, centering major built tourism infrastructure in already urbanized areas, and spokes that distribute visitors into the surrounding landscape in sustainable ways to engage with and enjoy nature, activities and cultural experiences.

Steps to success:

- Support local festivals through participation to highlight the park, local actions and to update/inform residents
- Promote festivals as a part of marketing efforts to attract visitors

- Conduct community engagement as a part of the region's specific tourism zoning efforts to help define tourism use zones within the valley.

Location	Priority	Time to implement
Valley	Medium Term / Medium Priority	2025 and on

B. Financial Pillar

The financial sustainability of Vjosa Wild River National Park and the broader valley destination are vitally important to protecting the landscape and supporting communities that live in the region. Tourism is a significant driver of this economic sustainability. The economic component of the tourism strategy for the park and valley focused on the following: **marketing and branding** of sustainable tourism products in the valley and the park to ensure their value is realized among visitors; **investments** to support development of sustainable tourism products that match new tourism market demands; **diversifying** the products, services, and experiences offered in and around the park to provide a more compelling tourism experience for visitors; and **developing** the infrastructure required to support all of these activities for years to come without negatively impacting the environment of the area.

B.1. Branding & Marketing

The marketing diagnostic assessment for Vjosa is based upon interviews and meetings with tourism stakeholders from both the private and public sectors, familiarization tours of significant tourism assets in the Vjosa valley as well as an analysis of existing marketing initiatives at the national and regional level.

National Context

The Albanian national strategy for sustainable tourism development 2019 – 2023 identified that *“There has long been a need for a new Albanian Tourism Brand and Marketing Strategy. The proposed national brand's strategy will focus on authentic Albanian products, as myths, stories, and attractions ... to model a fable for tourism Albania”*.

It is evident that in 2023, Albania’s focus on authentic and culturally distinctive tourism has not been articulated in the development of a brand image or in the current visitor experience. In reality, Albania primarily offers a more generic sun and beach focused tourism experience for visitors, a situation which will persist as the government aims to support the development of more tourist resorts, especially along the southern coastline. According to a World bank analysis in 2023, *“Albania is known as a beach destination for tourists who usually prefer shorter stays with low levels of individual spending—a profile associated with an undiversified tourism value chain with a limited range of attractions and activities”*. (source: Tourism 2.0 in Albania: A new opportunity for resilient growth – European Perspectives Feb 2023).

The Vjosa Valley has the potential to provide Albania with a destination that is different from the sea and sand market that currently predominates. Building on existing and attracting new markets that

are more discerning, higher value visitors. This product needs to be based upon unique cultural and natural attractions plus engaging and sustainable visitor experiences. Without this alternative to the sun and sand market, Albania runs the risk that a generic low priced, highly seasonal tourism brand will become embedded in the minds of potential visitors, a market position that will be challenging to change and not realize the full tourism potential of the country.

Vjosa Valley

The development of a strong Vjosa wild river destination 'brand' and marketing strategy for the whole valley and park will support a national realignment of Albania's tourism offer towards the vision outlined in the National Strategy. The international campaign for protection of the Vjosa River valley has already communicated some appealing brand expectations for the Vjosa region, that the Vjosa is truly 'wild' the last of its kind in Europe, an unspoiled, authentic region of well-preserved culture and natural attractions. The declaration of National Park status for Vjosa will also create an expectation that well-developed visitor experiences and amenities, similar to those offered in European National Parks will be available and crucially that negative visitor impacts will be managed and the river ecology will be protected.

Conveying the Vjosa wild river destination 'brand' and identify as a tourism destination to potential visitors is a key early, but also ongoing, action for the Vjosa Foundation/park and other tourism stakeholders in the landscape. With many competing destinations that travelers can visit around the world it is essential that the park and valleys distinct position as a wild river park and sustainable destination are the main drivers for marketing activities. It is also important that the business and attractions throughout the valley are a part of this effort to create a compelling destination for visitors. A single brand identify will be created for the whole region, with a distinctive sub-brands for the park that highlights its unique story and shows how it integrates as a part of the overall valley destination tourism experience.

Determining a consistent high impact **brand** to communicate the image and visitor experience offered in the valley is a critical first step. Funding for marketing efforts, as well as community and conservation initiatives will come from a visitor tariff (per person per stay) charged to visitors staying the night in the region as well as other revenue streams described in the 'Business Model' section of this report.

Action B.1.a. Brand & Marketing Strategy

A destination's 'brand' in essence is the expectation that potential visitors have about the experience they will have in a destination. The first step in developing an effective brand and marketing strategy is to articulate what the park and valley's brand means. What is the expectation we want to create and for whom? Is this expectation accurate now or in the future? Is it aspirational and compelling to our target markets?

This plan has already answered some of these questions. The identified target markets are higher spending experiential and adventure travelers, cultural and wildlife enthusiasts. The desired expectation to create and communicate is based upon unspoiled natural and cultural attractions, high value, unique and authentic activities and experiences, a good service standard and accommodations and sustainable tourism practices in line with the best international standards. This would also build on the 'Visitor hubs' discussed in the 'Visitor Planning Framework' section. During stakeholder engagement efforts relating to the brand, the sub-brands of each 'visitor hub' will also be defined and expanded on.

Vjosa wild river destination ‘brand’ and marketing strategies should also include local communities as a target ‘market’ for some of their marketing objectives. Local support for the park is crucial so a marketing strategy for the park should also communicate the park’s brand, its goals and benefits to local communities.

As the brand promise should be one that Vjosa destination can deliver, consistently, then the first essential of brand building will be product design and development to ensure that the experiences and activities offered support the Vjosa River ‘brand’. An effective brand for Vjosa will also require alignment between all stakeholders, particularly marketing agencies and businesses. The communication strategy for the Vjosa brand should be consistent. Public consultations are required to determine a shared vision for tourism development among all stakeholders, this vision should then be used to develop common brand messages and guidelines for the region and guide the development of a marketing strategy. The strategy will be one document and one brand, but combine focus areas on both the Vjosa River Valley and VWRNP.

Steps to success:

- Formulation of a comprehensive marketing strategy and set of actions designed to reach target markets. This will include a digital marketing strategy, utilizing social media, websites, and online advertising to reach a wider audience and drive interest.
- Develop brand position of the park and wider valley to include in marketing strategy, in consultation with tourism stakeholders
- Develop a compelling Park Name and Slogan to headline marketing strategy
- Develop a set of brand guidelines and content plan to guide marketing strategy
- Community engagement to define brand identity and also define sub-brands based on ‘visitor hubs’ along the valley
- Communicate brand guidelines to key partners, employees, tourism businesses, Local Tourism Promotion agencies (LTOs and DMOs), other stakeholders and community groups
- As part of the above, develop a crisis communication strategy that addresses any negative events or challenges while maintaining the park's positive image.

Location	Priority	Time to implement
Valley	Short Term / High Priority	2024/2025

Action B.1.b. Marketing Program

The marketing strategy should be an adaptive plan reviewed annually with specific promotional actions determined on an annual basis. Each action will address a specific marketing objective, each should be costed and include deadlines for delivery. The marketing strategy will be developed and implemented by the DMMO unit of the Vjosa Foundation; it will assign roles for all stakeholders to ensure that brand guidelines are followed. The strategy will also detail marketing content, channels, tools and processes required to achieve actionable goals.

Guidelines will be established on how to develop and deliver the right message to the right market types, consisting of high-value, sustainability minded travelers. Additional short-term priorities include collecting the necessary content to tell the story of the region and establishing platforms/channels to promote the park and valley effectively. These will be wrapped into a marketing

strategy for the DMMO envisioned under the Vjosa Foundation that will drive marketing activities of the region.

Steps to success:

- Produce high-quality photos, videos, and multimedia content that highlight the park's diverse landscapes, wildlife, activities, and local culture
- Develop communications materials to address the needs and interests of various visitor segments, emphasizing experiences, adventure, and educational opportunities
- Maintain a consistent visual language across all communication materials, ensuring brand recognition and reinforcing the park's identity
- Partner with eco-conscious brands, travel agencies, and sustainable tourism networks to enhance the park's visibility and attract responsible travelers
- Workshop to develop a travel trade key account and market segmentation plan
- Implement geo-tagging and geo-fencing in digital marketing efforts to target potential visitors based on their geographical location and interests
- Partner with environmentally conscious influencers and content creators to showcase the park's sustainable practices and unique experiences
- Offer webinars, articles, and multimedia content that educate audiences about the park's conservation efforts and sustainable practices
- Launch seasonal campaigns that align with the park's offerings during different times of the year, attracting visitors with unique experiences
- Incorporate messages about the park's sustainable practices, environmental impact, and community benefits into branding materials
- Ensure that branding materials and communication are available in multiple languages to cater to international visitors
- Participate in relevant travel and conservation events, expos, and fairs to promote the park and establish partnerships.
- Attract important international events in sustainable tourism in Vjosa Valley, such as the Adventure Travel Trade Association Adventure Next event
- Launch visually striking campaigns across digital billboards and online platforms to capture attention and spark interest
- Forge partnerships with nearby attractions, accommodations, and businesses to collectively promote the region's offerings
- Engage local and international media outlets to share stories of the park's conservation efforts, community involvement, and unique experiences
- Leverage visitor feedback to make improvements and adjustments, showcasing the park's responsiveness and commitment to quality
- Create park-branded merchandise like apparel, accessories, and souvenirs that visitors can purchase as mementos of their experience
- Organize seasonal events, festivals, and celebrations that highlight the park's cultural heritage, biodiversity, and community traditions

Location	Priority	Time to implement
Valley	Short-Term / High Priority	2025, then ongoing

B.2. Promoting Sustainable Tourism Investment

The financial basis necessary to create new businesses, products, services, etc. in the valley will require investment by private entities, donor organizations, non-government organizations, and government. These investors will likely determine whether to provide capital based on how they align with the region’s mission to develop tourism with sustainability at its core and the likely returns from such investments. Depending on the organization this will include financial, social and/or ecological returns.

The rapid growth of tourism in Albania has already stimulated increased investment, particularly in accommodation. In the absence of an overarching investment strategy, aligned to the new destination brand, there is a risk that inappropriate or unsustainable developments could reduce the appeal of the Vjosa Valley for targeted high spending market segments. To encourage more appropriate investment the Vjosa Foundation should take a proactive approach to investment and develop an integrated investment strategy for both public and private investments.

Action B.2.a. Public Tourism Investment Strategy

The Vjosa Foundation will play a central role to encourage and coordinate public investment in the landscape. This will include national and local government, bilateral and multilateral donors, non-government organizations and others. The focus of the public tourism investment strategy will be on ‘hard’ and as well ‘soft’ projects. Hard investments provide the public tourism infrastructure needed to facilitate tourism in the landscape, such as visitor information centers, trails and signage (see B.4.). Government land for ‘hard’ public investments will be identified and transferred to the Vjosa Foundation for management and development.

Soft investments will include support to projects that facilitate the sustainable development of tourism in the landscape, such as the tourism incubator (see B.3.) and sustainability programs (see A.1.). The public tourism investment strategy will consolidate information on these programs and outline steps to fundraise around them with potential funders.

A ‘Vjosa Donor Working Group’ will also be established of key government and donor representatives that will coordinate donor funding and projects in support of the public Tourism Investment Strategy. These programs may support the Foundation directly, or run in parallel in support of the overall objectives of the Foundation and region. The Foundation will provide a secretariat role for this ‘Group,’ which will help to coordinate activities. The Group will provide a forum for those with resources to review the needs and opportunities for public investment in the region and support the landscape where it fits with their organizational and programmatic goals. The goal with the Group is not to pool funds, or dictate how organizations spend their funds, it is more to coordinate among partners to have the greatest impact at scale that is possible.

Steps to success:

- Establish ‘Vjosa Donor Working Group’ of government and donors to coordinate and focus public investments in the region
- Identify government land for public tourism investment and work with government on transferring management of land to Vjosa Foundation

Location	Priority	Time to implement
Valley	Short Term / High Priority	2024 - 2025

Action B.2.a. Private Tourism Investment Strategy

The Vjosa River Valley tourism development strategy will include specific investment opportunities in the region that will help to build a sustainable tourism industry as well as a package of incentives to encourage inward investment and catalyze entrepreneurial activity in tourism. The focus of this program will be on specific 'signature' tourism products, that will either generate revenue for the park/Foundation, or model best practices in sustainable tourism in the region.

A 'signature' investment portfolio of priority investments will be developed, building on ideas outlined in section B.5.c of this document. Proposals for new ideas that will support the sustainable and innovative tourism industry in the valley and that fit with the goals of the Foundation will also be encouraged. Criteria for the type of private tourism investment that will be promoted will be developed along with detailed descriptions of the initial portfolio of projects.

The portfolio will identify optimum locations (development 'plots') for private sector investment in specific tourism infrastructure or services. This will include government owned land which will be made available on a long term lease basis for investors to develop specific tourism businesses on the land. The rent from this land will provide revenue for park operations. The leases will specify the suitable business types for the land and the guidelines for operating the business on the land.

Investment activities will work to stimulate local ownership, where appropriate with investment from outside the area. Supported businesses must be compliant or achieve compliance within an agreed period of time once they open, with international standards in sustainable tourism (ISO 20611, ISO 23405, GSTC). For a list of potential businesses, please see section B.5.c.

The Vjosa Investment Portfolio will also work with the government to provide investment incentives such as sources of co-funding, tax incentives (tax holiday) and streamlined planning procedures for the 'signature' investments. Through the 'Wild River Club' other support activities may also be leveraged through donor partners. The investment incentives will support the development of sustainable, higher value, low volume tourism offers which directly benefit local communities.

Under the Albanian Technical and Economic Development Areas (TEDAs) legislation, special free economic zones were created in 2015 offering businesses exemption from paying tax on profit for the first five years - from the day when they start their activity in the area. 'Specific institutions' in each area facilitated procedures and helped businesses 'avoid bureaucracy.' Vlore (Vlorë district, approx. 230 hectares) was designated as one of the 4 special economic zones. This scheme should be extended to include eligible tourism business under the 'signature' investment portfolio program in the Vjosa valley.

An entrepreneurial incubator programme will additionally focus support for investment by residents and younger adults in new tourism enterprises and help to address the 'brain drain' of young rural talent from the Vjosa Valley (See Section B.3.).

Steps to success:

- Develop a list (portfolio) of priority investment opportunities in each tourism hub
- Identify specific plots of government land in the valley that can be managed by the program and work with government on transferring management of land to Vjosa Foundation (note: land will not be sold, only leased for private operations)
- Establish criteria for 'signature' tourism investments and a structure for the operations of the portfolio (ensuring financial and sustainability metrics)
- Define incentive package with government for 'signature' investments

- Develop an investment promotion strategy, including collateral material for the investments
- Publish an online map of tourism investments. The portal will detail the Valley investment promotion plan and identify incentives and business opportunities in each of the priority investment areas and sectors
- Initiate investment promotion activities

Location	Priority	Time to implement
Valley	Short Term / High Priority	2024 - 2025

B.3. Product Development and Tourism Incubator/Accelerator

Strengthening and creating new tourism products, experiences and related businesses, that build on the VWRNP’s theme of sustainability, will be necessary to keep the community and visitors equally satisfied. As the leading force for sustainable tourism in the valley, the Foundation’s role will include guiding the formation of ventures that take advantage of the diverse natural and cultural resources of the region as well as the existing and desired skill sets of the community. Building capacity of many business types will require the use of both direct and indirect assistance as well as a large degree of flexibility, and should be considered an ongoing process to support the community to leverage tourism for the benefit of themselves and the park/valley.

Among the most important short-term projects is the establishment of a dedicated incubator/accelerator to selectively support on-brand ventures (e.g. eco-tours, culture-based activities, nature photography, and adventure operations) through training and mentoring during pivotal early development and scaling. Incubator/accelerator projects also provide a distinct opportunity to build upon the valley’s unique cultural values in ways that complement tourism, such as the inclusion of artisan and culinary communities. Efforts in this area should be driven by the Foundation, but may be implemented by other supporting partners, such as international donor organizations. This could be facilitated through the ‘Wild River Club’ (B.2.a).

Action B.3.a. Tourism Business Incubator/Accelerator

The Vjosa tourism incubator/accelerator program will provide a comprehensive package of support for start up enterprises and existing businesses looking to scale to help them develop high value, market ready visitor experiences and activities. Support will take the form of business and product development training workshops and master classes, mentoring and advice on legal and business matters, office space (if needed), marketing support to help the businesses reach new target markets and some micro-grants for capital investments in the tourism offers. Participating local early-stage and scaling businesses and entrepreneurs will be invited to apply for the program through several public information meetings. Successful applicants will join an incubator or accelerator cluster of around 10 enterprises of each in the first year to receive support through the program. Selection of eligible enterprises will be determined by the type of tourism products and other factors. The program should last around 10-12 months with new incubator/accelerator cohorts launched each year as required.

Grant awards for Startups and Facilitators, which were provided by the Minister of State for the Protection of Entrepreneurship in the region should be extended. A new round of grant support will

be provided for tourism entrepreneurs in the Vjosa River Valley. As with the previous scheme, the scale of financial support will depend on the startup stage of growth.

Steps to success:

- Awareness program to highlight case studies and models from elsewhere for potential tourism products in the region as well as market trends to understand what the market wants
- Inform and educate local entrepreneurs about sustainable livelihood opportunities in tourism through a ‘Conceptualizing and Enhancing Your Tourism product’ program
- Establish a tourism entrepreneur incubator/accelerator to support local tourism SMEs
- Clarify business start up guidelines and oversee a one stop shop to facilitate SME creation
- Support local SMES to access available funds and other support
- Offer workshops for local businesses to adopt eco-friendly practices, creating a network of partners committed to sustainability

Location	Priority	Time to implement
Valley	Medium Term / High Priority	2024-2027

Action B.3.b. Local Artisan Initiative

An important industry sector for enhancing the cultural tourism offer are local artisans and craft makers, both as suppliers of authentic locally produced souvenirs and gifts but also as potential facilitators of participatory cultural tourism experiences. Artisans would be eligible for the incubator/accelerator program described in B.3.a, but would also receive support from the Foundation to develop co-brandable artisan products that would be sold through retail outlets in the Visitor Center as well as other locations where retail distribution channels are established, such as hotels that are a part of the Vjosa Quality Mark program. Members of the ‘Wild River Club’ may also be engaged to support local artisans in the development and installation of public art that highlights and celebrates the park, such as murals, sculptures, etc. in public spaces. Such installations help to educate and inspire residents and visitors. Art events and spaces should also be supported as ways to engage with the community and as part of tourism promotion in the region.

Steps to success:

- Collaborate with local producers to create park-branded products, generating income for both the park and local entrepreneurs.
- Organize regular artisan markets where local artisans can showcase and sell their handmade crafts and products to visitors.
- Encourage investments in art centers that offer workshops, residencies, and exhibitions celebrating the park's beauty and cultural heritage.

Location	Priority	Time to implement
Valley	Medium Term / Medium Priority	2025-2028

B.4. Park Related Tourism Infrastructure

The park and broader valley's ability to host visitors sustainably will depend largely on infrastructure that is in place to support its services. This infrastructure should include both physical structures as well as the digital platforms and tools that support the region online. With the exception of a small number of entry points to the river for rafting, etc. infrastructure (such as recreation services like toilets, picnic tables, campsites, signage, parking etc.) will primarily be located outside of the park, but is needed to manage the flow of visitors so as to minimize impacts on the river. Land for this infrastructure will need to be purchased, or otherwise obtained through government land.

Short-term priorities for the park include development of a visitor center, visitor stations, trail networks, information kiosks, parking areas and signage at strategic locations along the river, safety management stations, especially in areas where rafting and similar activities are occurring within the park, and digital infrastructure to provide accessible information to visitors and community as well as a channel for payments, etc.

The information provided in this section is an overview of the needs for tourism in the landscape, and relates to a separate 'Interpretation and Visitor's Experience Plan' developed as a complimentary document to this.

Action B.4.a. Information Centers and Stations

Information and educational sites along the river are important hubs where visitors can learn about the park and the broader landscape as well as organize activities. As of October 2023 a tender has been published by NAPA for the design of a Multifunctional Center and Information Stations as well as an interpretive masterplan for VWRNP. The visitor center is envisioned in Tepelena, with two additional information stations developed in Vlore and Permet. Collectively these would provide an interpretive 'hub' in each of the three sections of the valley (upper, middle and lower). The specific locations for the sites will be determined through the interpretive master-planning process.

The visitor center and stations are also logical administrative hubs for park/Foundation staff, where offices and meeting space can be located. If planned well, the visitor center space and meeting rooms can also be a source of revenue, renting the facility for meetings and events to generate revenue for the park/Foundation. Souvenirs and a cafe may also be made available for additional revenue through rent of the cafe space to a private operator and Vjosa branded souvenirs and artisan products (See B.3.b).

Additionally, the Vjosa Research Center in Tepelena could also be envisioned playing an additional role as a visitor center/station, but would provide a space to attract and engage with university and research organizations that study the river and valley ecosystems as well as a site for educational programming, including camps and tourism experiences. The research and education center would create an immersive space for visitors from Albania and internationally, attract research that could also build awareness about the landscape, and generate revenue for the park/Foundation.

Strategic locations close to, but not next to, the river should also be utilized for informational signage about the park and, in the more popular sites, a more extensive information kiosk. Kiosks should be located in major boat launch areas, swimming spots and scenic bridges as well as other towns and villages beyond those where a visitor center/station will go. More basic signage about the park can be located at trailheads, parking areas, etc.

Steps to success:

- Mapping of locations for centers, stations, kiosks and signage with phasing for their development and installation
- Interpretive materials design for standard signage and kiosks (building on interpretation & visitor experience plan)
- Feasibility study for research and education center
- Establish interpretation center and stations equipped with interactive displays, exhibitions, and educational resources, enhancing visitor understanding of the park's significance
- Develop research & education center

Location	Priority	Time to implement
Valley	Medium Term / High Priority	2024 - 2027

Action B.4.b. Recreation Infrastructure

No infrastructure can be built within the park itself, but recreational infrastructure that enables visitors to see and experience the river, without negatively impacting it is important, both from an educational and visitor experience perspective as well as a visitor management perspective. Well designed and planned trails, viewing structures, parking areas, road stops, bathrooms and rubbish receptacles as well as informational signage will all help to focus and manage the flow of visitors to areas where they can experience the park with minimal impact.

A second phase to the interpretation master plan envisioned for the park visitor center/station development (B.4.a.), will need to be a recreation infrastructure and access master plan to identify key locations along the river for low impact trail development and put in place the site level planning for their realization. Trails may include non-motorized, such as walking (for all types of visitors, of different abilities, including wheelchairs), hiking (more rugged marked trails), horseback riding and biking as well as viewing platforms. The plan would also look at motorized trails, using existing road networks, for driving tours of the region as well as sustainable public transportation routes.

For the sustainable public transportation route, this may be developed as a step-on-step-off ticket based service for visitors and residents between major urban and rural sites along the river. It would encourage public, rather than private, means to move through the landscape and would also connect to non-motorized trail heads. To be effective this should be envisioned as a public-private partnership with a private tour operation running the operations and government as well as the Foundation supporting the effort. This project would be established as a 'signature' investment for the park (see B.2.a.).

Rafting is a major activity within the park, and although new infrastructure is not allowed in the park, river access points exist and will be allowed in specific areas. The specific points of entry will be defined in the park management plan. Parking, restrooms, boat staging areas, signage and picnic tables with rubbish facilities will need to be located at each site, but outside of the park boundary. Land for these facilities will need to be obtained or provided through government land.

Steps to success:

- Recreation infrastructure master plan
- Land purchase/transfer agreements for trails and other infrastructure
- Develop description and call for a 'signature' investment - Vjosa sustainable public transportation route

- River access point stabilization
- River access point infrastructure development
- Trail development

Location	Priority	Time to implement
Valley	Long Term / Medium Priority	2025 - 2030

Action B.4.c. Digital Infrastructure

The information that is provided at visitor centers, information stations and through signage are vital components to informing and educating visitors and residents. However by their nature they are static and located in a specific physical location. With over 400 km of river making up the park, there are large gaps of geography that will have no physical interpretation infrastructure along it. Digital information can fill this gap and is a vital layer to inform, educate and engage with people along the river as well as those elsewhere thinking about visiting.

Building on the current [Vjosa website](#), a more extensive destination portal as well as mobile app will be developed. The online portal will provide visitors with information on the park and valley as well as practical information on getting around, places to stay, things to do, etc. The site will list activities and experiences that are promoted by the park/Foundation as well as provide an ability to book in-park activities. The portal will be in multiple languages.

A complimentary, GPS enabled, App will also be available that allows visitors to learn about the park offline through self-guided tours while exploring the region as well as make bookings, etc. An ability to support citizen science through wildlife sightings, reporting issues, etc. will also be integrated into the App. Physical signage, kiosks and other materials that are developed within the valley will also have a QR code on them that can lead visitors to download the app, or explore the website (see B.4.a. and B.4.b.).

Steps to success:

- Development of Vjosa web-portal content and structure
- Development of Vjosa App
- Establish citizen science system to gather and review information generated by the public (possibly through the proposed research and education center)
- Integration with physical signage (QR codes)

Location	Priority	Time to implement
Valley	Short Term / High Priority	2024

B.5. Revenue Generating Tourism Products

To sustain the VRWNP and generate revenues for the park, it is necessary for the park to offer fee based tourism activities and services. Some of these can occur within the park and others outside of

the park, but overseen as park tourism products. As the mission of NAPA is to protect and manage the park rather than operate tourism activities, it is recommended that, where possible, the park/Foundation concession or provide access permits for tourism services and activities to private operators, under strict management guidelines. The professional tourism operators and services would pay NAPA/Foundation concession or permit fees for the opportunity (See Park Business Model section for more details). This also provides opportunities for local residents and businesses to benefit from the park. Access to land outside of the park, but nearby, that can be managed by the Foundation as 'revenue lands' for tourism activities, is also critical to give the park the foundational assets on which to generate revenues that will sustain their operations.

Action B.5.a. In Park Tourism

In-park tourism activities are limited and will be required to meet strict standards of practice, but may include the activities listed below. Guidelines, standards and standard operating procedures (SOP's) for tourism operations in the park as well as those that are branded and overseen by the Foundation outside of the park will be developed (See also B.5.c.). Model permit and concession agreements and structures for concessions in the park as well as those on government/Foundation managed lands in the valley will also be developed.

Rafting & Kayaking: Commercial rafting and kayak operations will be allowed along specific, currently utilized, stretches of the park and with specifically designated put-in and pull-out locations (also the ones currently in use). Initially this will focus on the upper and mid-river section of the river from the Greek border to Permet, Kelcyre and Tepelene. Once the carrying capacity study (D.1.) is completed, additional routes may, or map not, be added based on this study.

Each commercial rafting operation will have to apply for a permit from the park/Foundation to conduct rafting tours on the river. The permit must be renewed every four years and will be accompanied by required training, put on by the Foundation at a cost paid by the operators, for all staff who will operate on the river. The training will cover leave-no-trace, sustainability and safety issues relating to rafting on the river.

The permit holder will be required to pay a fixed annual permit fee to the Foundation/park as well as a fixed per-person fee for each non-guide visitor on the boats. Company and individual visitor permits will be checked by Foundation staff on entry to the park. Fees will increase after two years based on an agreed escalation percentage. Fees will be set and consistent for all operators.

The total number of operators receiving permits as well as the total number of visitors per permit holder will be set to ensure minimal impact on the park environment and a unique experience for visitors. Initially it is envisioned that a maximum of six company permits for rafting/kayaking will be made available to Albanian companies. This is the estimate of the current number of companies operating on the river. The activities of these operators will be closely monitored. Once the carrying capacity study (D.1.) is completed, the number of allowed company permits may be expanded if this is deemed possible by the study. A schedule for launch times will also be established so as to spread out raft groups on the river and avoid overcrowding on the river as well as put-in and pull-out locations.

For more information on fees please see the Park Business Model section for illustrative revenues to the Foundation. The Permit will commit the commercial operation to a set of standards and guidelines that they must meet as well as payment of the required fees. If they are found to violate these standards and guidelines or not pay fees their permit will be revoked and cannot be renewed for a minimum of four years.

Educational Excursions: Low impact excursions on the river and river banks may also be conducted. These will be run by private guides/operators under a permit system similar to that described for the rafting/kayaking and with a similar fee structure (fixed annual permit fee and a fixed per non-guide visitor fee, payable to the Foundation), as well as standards and guidelines to which permit holders are required to adhere. Guides who lead these excursions will be required to have formal guide training certification (based on national standards), including in nature based interpretation and also be certified as a leave-no-trace trainer.

An educational excursion plan will be established by the Foundation, local scientists, conservation NGO's, NAPA, guides and other relevant stakeholder will be consulted to determine sites along the river where educational excursions can occur and what activities are permitted. Each educational excursion site (defined stretch of the river) will have an exclusive permit associated with it, which will be made available to guides/operators to apply for through a competitive bid process. Permits will be issued for four years. Fees will increase after two years based on an agreed escalation percentage.

Steps to success:

- Development of guidelines, standards and standard operating procedures (SOP's) for park/Foundation branded tourism products and operators
- Development of model permit & concession agreements and structures, as well as application procedures
- Develop educational excursion plan
- Training for tourism related Foundation/park staff
- Creation of training program for raft/kayak permit holder staff and educational excursion guides
- Collaboration with potential permit holders to establish systems for payment, launch time schedules, emergency procedures, etc.

Location	Priority	Time to implement
Valley	Short Term / High Priority	2024 - 2025

Action B.5.b. In Park and Valley: Scientific, Academic, Volunteer & Educational (SAVE) Tourism

The park is in a unique position to combine research and conservation activities that are conducted in and around the park, with hands-on educational opportunities for Albanian residents (especially youth) as well as international visitors looking for a nature-based learning experience that gives back to the destination they are visiting. This would be an extension of the Educational Excursions, but specific to the SAVE market. The physical location of the program may be located in the Vjosa Research Center in Tepelena or some other appropriate location (B.4.a).

The program will focus on engaging with and attracting scientific and academic institutions to the landscape to study the ecosystems within the valley. These partner institutions will support a greater understanding of the park's natural systems, build awareness internationally of the region and bring revenue through their programmatic activities. The Foundation can layer tailored visitor experiences for volunteers and educational travelers onto the scientific and academic activities in the area. These travelers can be accessed through academic institutions and specialist tour operators. Companies such as Biosphere Expeditions and Rewilding Europe arrange for wildlife enthusiast to participate in

essential and meaningful conservation research and habitat rehabilitation and would be strong partners, along with other similar operations.

The visitors’ activities will support the research within the landscape (i.e. they will participate in research activities), they will learn from the experience they are supporting as well as generate revenue for the Foundation and local businesses. Some educational activities for Albanian students will also be offered at lower rates. In addition to research and conservation activities in and around the park, the SAVE program may also focus on reforestation initiatives (that visitors can also get involved in through tree planting).

Steps to success:

- Develop a specific SAVE / Research and Educational Center strategy
- Initiate partnership outreach with academic and research institutions as well as educational travel companies
- Create educational programs for schools, universities, and organizations, offering curriculum-aligned experiences that promote learning and appreciation for nature
- Conduct workshops, courses, and volunteer conservation programming on topics like sustainable agriculture, nature conservation, and traditional craftsmanship
- Offer outdoor education programs for youth groups, focusing on environmental awareness, teamwork, and leadership development for Albanian students
- Develop a carbon sequestration offer of tree planting, ideally along the recommended edgest of the park, to reduce erosion, generate income, and add to ecotourism offerings

Location	Priority	Time to implement
Valley	Medium Term / Medium Priority	2025 - 2030

Action B.5.c. In Valley Tourism

As discussed in B.2.a., government land that can be transferred under Foundation management will need to be identified, along with a plan for the potential use of each piece of land. The guidelines, standards and standard operating procedures for tourism operations as well as model concessions described in B.5.a will also be developed to include these tourism products.

Potential tourism products that are located outside of the park, but co-branded with the park/Foundation and utilize the land managed by the park are listed below. These will also be the focus ‘signature’ tourism investments for the investment activity described in B.2.a. These tourism products will be operated by private organizations, but run through a lease/concession agreement with the Foundation on Foundation managed land. The Foundation will receive monthly rent revenue from these operations. Additional ‘signature’ products may also be identified and added to this list by the Foundation.

Initial ‘Signature’ tourism investments may include:

- Adventure parks and attractions,
- Low impact eco-friendly campgrounds

- Locally owned homestay and rural accommodation providers
- Sustainably certified ecolodges
- Sustainably certified tour companies offering guided nature-based experiences (wildlife viewing, rafting, hiking, kayaking, wellness, culinary, craft making, agritourism, art and music)
- Vjosa Sustainable Transportation Trail (See B.4.b.)
- SAVE travel experiences (see B.5.b.)
- Parking spaces

In addition to the tourism products described above, a number of other revenue generating opportunities exist for the park and Foundation.

Branded Merchandise and Artisan Products. As described in 5.3.b an artisan program will be established with local artisans to promote local art relating to the park as well as co-branded artisan products. These products will be sold through the visitor center/station gift shops as well as through tourism businesses that participate in the Vjosa Quality Mark (A.1.b), who will act as resellers.

In addition to local artisan products, other branded merchandise will also be developed and sold, such as clothing, calendars, books, gift items, etc. A staff member in the Foundation will be responsible for merchandise for the Foundation sites and reselling through Vjosa Quality Mark participants.

Vjosa branded clothing could be developed for the park as well as broader distribution and sale outside of the area, with a portion of revenue supporting the Foundation to conduct conservation, park and community program. Examples of similar initiatives with the US National Park Service include the [‘Parks Project’](#) (Figure 7) as well as [initiatives](#) by REI, L.L. Bean and others.

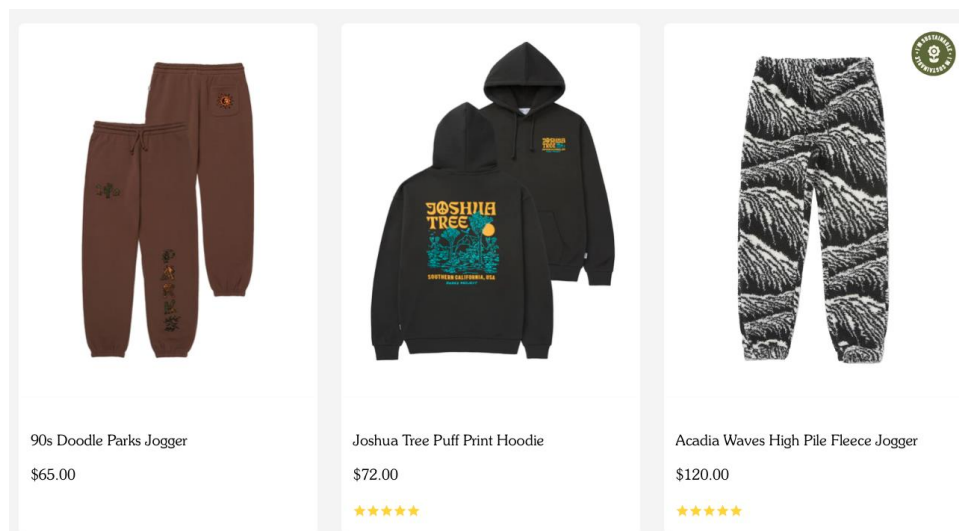


Figure 7: Park Project Apparel

Drone & Virtual Tours: An additional opportunity and unique tourism experience that could be adopted by the Foundation are virtual tour experiences. The experience would take visitors and those online around the world on a ‘guided’ trip around the valley and explore the region from a perspective hard to get in any other way. This would be recommended (not live) video content of the valley. This activity could be based out of the visitor center/stations or other locations along the valley.

Additionally, and utilizing the same technology, virtual tours could be offered through Airbnb experiences (or similar platform), for people from anywhere in the world to explore the park virtually.

Such an experience would combine a local host (guide), who would engage with the virtual visitors at a prearranged time and for a set duration (e.g. a 2-hour tour). The host would talk about the park, fly alongside the park (drone) to show its beauty live and then also engage with local experiences virtually with the guest, such as visiting a local artisan to see what and how they make local crafts, visiting a local farm to learn about farming practices, etc. The virtual visitors would be able to ask questions and interact with hosts during their visit. Revenue would be generated through the sale of these tours.

Gamification: A conservation themed ‘escape room’ could be established as a part of the Visitor Center that would provide engaging ways to learn about the valley and threats to the region. A longer-term initiative may also be explored by the Foundation in the future that would form a partnership between the Foundation and a video game company to create a video game of the park. This could be along the lines of ‘Settlers’ and/or ‘Indiana Jones’ type games where players would have to solve different and adventurous conservation issues, threats, and some obligatory ‘bad guys’ trying to do things they are not supposed to, to protect and enhance the park. If successful the game could generate royalty revenues for the park as well as act as a significant promotional tool to spread the word about the landscape.

Steps to success:

- Identify government land in the valley and work with government on transferring management of land to Vjosa Foundation for lease for sustainable tourism activities
- Development of guidelines, standards and standard operating procedures for park/Foundation branded tourism products and operators
- Development of model lease/concession agreements and structures
- Initiate call for potential investors and tourism businesses for land parcels
- Develop a merchandise plan and identify potential products & outlets
- Merchandise development and inventory
- Sales and outreach to merchandising channels to install merchandise and establish program
- Drone/Virtual tourism plan
- Establish drone/virtual tour program within visitor centers/stations (or other location)
- Flesh out gamification concept and potential target video game companies

Location	Priority	Time to implement
Valley	Short Term / High Priority	2024 - 2026

C. Human Capital Pillar

To ensure tourism is successful in the park and valley as well as local residents benefiting from tourism, there is a need for a well trained and capable local workforce. This includes building the capacity of park/Foundation staff and the employees of tourism businesses, sites and attractions. It also includes awareness for the broader community to understand tourism in the landscape.

Relating back to the overall sustainability vision for the destination, according to GSTC Destination criteria, the Foundation should encourage and support career opportunities and training in tourism. The destination’s tourism enterprises, sites and attractions should also commit to providing equality

of opportunity for local employment, training and advancement, including for women, young people, minorities and people with disabilities.

C.1. Building the Capacity of Park/Foundation Staff & Partners

There are a lot of roles and skills needed to properly manage and operate a national park. As tourism and visitor management are critical components of the park’s operations, broad understanding of tourism across all staff, and specific skill development for those playing a front line role with visitors and tourism stakeholders is critical. This is also relevant for staff that play a significant landscape-wide role in tourism development connected to the park as well as the broader valley. This includes local government and destination management organization staff involved in promoting tourism at a regional level as well as some national level staff, such as in NAPA and the Ministry of Tourism & Environment.

An introduction to tourism and visitor management for all park, foundation and partner staff will help to ensure that there is broad understanding of tourism within the staff. Even if they are not directly involved with visitors, this will help to ensure they understand the dynamics involved between protection and operations of the park and visitor use.

More specialized training for management will also include building the skills locally to plan for and manage tourism within and around the park in a sustainable way (see also risk management and tourism planning in the Governance Pillar). The park should have at least three dedicated tourism officers (eventually more), spread along the length of the river, that are trained to oversee permitted park usage in their area as well as have guiding and visitor management skills. These individuals will be the direct point of contact between park and private sector tourism stakeholders (e.g. guides, tour operators, etc.) as well as park and visitors.

Steps to success:

- Develop and implement broad tourism and visitor management training for all staff
- Establish reusable training videos, manuals, etc. that will be required for all new staff hires and can be utilized without the need to hire a trainer each time new staff are hired
- Establish an ongoing training plan for staff in the Foundation and related partners
- Implement Tourism Officer Guide training for VWRNP operations staff.
- Implement Management Training for Foundation and NAPA staff.
- Implement Sustainability Certification Training for a joint management team tasked with attaining destination recognition for sustainability.

Location	Priority	Time to implement
Park	Short Term / High Priority	2024-2025

C.2. Tourism Training for Business, Sites & Attractions

At the valley wide level, the vision for the destination is a high quality, high value tourism offer that attracts visitors interested in a sustainable, nature-based tourism experience. This goal is shared by many tourism stakeholders in the landscape and to achieve it, the tourism businesses, sites and attractions of the region need support in improving their skills to provide the expected level of service.

As mentioned in the sustainability section, this will commence with 'leave no trace' training for all tourism stakeholders in the area that engage directly with visitors (A.1.a). The training program will instill basic sustainability knowledge within the broad tourism sector as well as the ability for these individuals to pass this information on to visitors verbally as well as through signage and operational practices.

Through supporting partners initially and then through the proposed Vjosa Foundation, training programs will also be implemented for tourism stakeholders, including guide training, storytelling and interpretation techniques specific to the park and valley ecosystems, hospitality skills, first aid training and potentially other training as identified by local stakeholders.

Example: Next Tourism Generation Academy

This operates with a focus on two objectives:

- To prepare a new generation of specialists for the hospitality and tourism industry
- To provide training to representatives of tourism-related industries according to international criteria, in an application form adapted to the current needs of the business environment.

Additional components include a tourism Intelligence Journal/Blog providing statistical data used in market research, development of tourism products, PR, and marketing strategy.

Steps to success:

- Leave no Trace training for tourism stakeholders, emphasizing responsible behavior to minimize disturbance to wildlife and ecosystems
- Local guide training in good guiding principles and practices, content specific subjects relating to the park/valley ecosystem and in effective destination storytelling to enhance visitor engagement. This will leverage and build on the current guide training and licensing process in Albania
- Hospitality training for tourism front line staff
- First-aid training for tourism front line staff and guides conducting adventure/outdoor activities

Location	Priority	Time to implement
Valley	Medium Term / Medium Priority	2025-2027

C.3. Community Trainings & Awareness

In addition to tourism stakeholders, there is a need to engage, inform and educate residents of the region on the park, tourism and the sustainable principles that bind these effectors together. Community awareness programs will include extending the 'Leave no Trace' program to the broader community, through introductory trainings (2-hours) and as well as an awareness campaign in the landscape that informs local residents (as well as visitors) about how to act in a sustainable way in the region. Elements of this will also be integrated into all community engagement activities (meetings, trainings, festivals and events) to reinforce the message. Effective ways to engage the community often include schools, providing programs for children that then also engage the parents and other family members in activities.

In addition, there is a need to build the capacity of community members to develop tourism, or tourism related enterprises in their communities, benefiting their communities as well as the positive connection between community and the park. A detailed plan for these activities is outlined in the Planeterra ‘Community Tourism - Vjosa Action Plan.’ Elements of this plan include:

- Stakeholder engagement & capacity building (already initiated, but will need to continue with targeted trainings and capacity building efforts that enable community members to understand tourism and conceptualize their business opportunities)
- Product development (training, support and mentoring to develop tourism enterprises as well as the skills to manage them effectively. This also includes packaging of networked tourism enterprises to create multi-day itineraries)
- Marketing & Promotion (telling the story of the tourism experiences being offered by the community through direct and travel trade promotion, events and awareness campaigns. This will also need to tie in with other regional marketing efforts)
- Infrastructure & Services (ensure the infrastructure to access the tourism products is sufficient as well as the services linked to them, such as accommodations, guides, information centers, etc.)
- Partnerships & Collaboration (establish and strengthen partnerships with donors, NGO’s educational institutions, local government and others that can support the efforts of the community tourism enterprises)
- Monitoring & Evaluation (establish systems that can track success and provide guidance to enterprises on areas of improvement as they continue through their tourism development journey)

Steps to success:

- Implement Planeterra Community Tourism - Vjosa Action Plan
- Develop programs that educate and empower communities about the park & tourism
- Develop programs that educate and empower communities about sustainable practices
- Oversee community education and awareness campaigns on major topics of tourism including visitor management and emerging trends.
- Develop, publish and provide training on a code of conduct for local hosts

Location	Priority	Time to implement
Valley	Short & Medium Term / Medium Priority	2024-2027

D. Governance & Policy Pillar

Governance and policy are key factors in enabling tourism to occur effectively in the destination and also to monitor and manage tourism to ensure it does not have negative environmental and social impacts in the area. This includes visitor management in and around the park, risk and safety systems as well as the legal frameworks that support the park, the community and tourism businesses.

Normally the purpose of a governance and policy pillar is to reduce regulatory obstacles to tourism development. However, the overriding consideration for Vjosa is to protect the natural environment,

with sustainability as the cross-cutting pillar. The situation in Vjosa will require not only liberalization of some tourism and planning regulations but in many cases new restrictions will be needed, or at the minimum existing laws will need to be enforced, to ensure the development of high value as opposed to high volume tourism and to protect the park.

D.1. Park and Visitor Management

Effective management of tourism and visitor interactions within and around the park will be critical to the long-term sustainability and success of the park. An initial step in ensuring effective management is a park specific carrying capacity study and zoning/spatial planning to understand and provide a defensible guideline for the number of visitors that can be in specific zones within and around the park. This analysis should also include site specific tourism plans within each zone that provide the detailed planning for tourism activities at each site, based on the carrying capacity.

Before the results of a carrying capacity study are available, the park should look to maintain approximately the same use levels for activities in the park that are currently occurring. Initial conversations with experts indicate the impact from current use levels for rafting, etc. is manageable and therefore likely not currently exceeding the capacity of the landscape. As the Foundation itself and the carrying capacity study may take time to develop, a short-term basic permit (1-year) will be required to ensure current tourism operations (especially rafting) are not disturbed.

In parallel to this process, a set of standardized 'sustainable tourism standards and guidelines' can be developed that provide the guiding principles for tourism in the valley and park (See also B.5.a.). This will also include standard concession/permit agreements for park/private sector tourism operations, standard operating procedures (SOP's) for staff and tourism practitioners as well as checklists and other tools to implement their work. A communications strategy (including informational materials) will also help to inform all stakeholders and visitors about their roles and responsibilities.

A comprehensive monitoring and evaluation framework will also be established, with implementation guidelines and tools to monitor the impact of tourism and ensure there are feedback loops to adapt management practices to address issues relating to tourism as they arise. This can be developed alongside the standard concession/permit agreements, etc. This monitoring and evaluation framework will be developed by and overseen by the Park Management Unit within the Foundation, so that the tourism unit is not monitoring themselves.

Steps to success:

- Develop short-term 1-year basic permit for current tourism operations in the park (rafting), while longer-term systems are put in place
- Implement visitor carrying capacity assessments for activities and specific sites within the park and within a defined zone around the park to prevent overcrowding and ensure a quality experience.
- Conduct zoning of park and surrounding areas to guide the type of tourism allowed in each area
- Develop standardized guidelines, standards and SOP protocols for staff to follow as it relates to tourism
- Develop communication strategies that encourage respectful interaction between visitors and local traditions.
- Establish a robust monitoring and evaluation framework to assess the effectiveness of tourism and sustainability initiatives over time and feed into park management

Location	Priority	Time to implement
Park & Valley	Short Term / High Priority	2024-2025

D.2. Risk and Safety Management

Due to the wild nature of the park and the type of tourism activities that occur in and around it, a detailed risk and safety management plan and program is important. Lack of adequate safety planning in the Vjosa River Valley represents a significant risk to visitor safety, environmental protection and also the reputational risk for Vjosa's 'brand' arising from adverse events and the resulting negative media coverage. According to IUCN 'Feasibility Study Vjosa,' focus group research, safety and risk planning and management is not systematic or comprehensive within private sector tourism businesses or public institutions in the area. High value tour operators from Western Europe and North America are very risk averse and need assurance from local suppliers that risk and safety considerations are paramount.

An initial step in implementing the risk and safety management plan is to establish the systems within the park/Foundation staff and their operational procedures, including safety and emergency training as well as regular safety/emergency drills alongside community and emergency services in the valley. At least one staff member of the park/Foundation should have the primary responsibility for safety and emergency response.

Safety committees in the upper, middle and lower sectors of the park will be established that include Foundation staff, emergency services and community. Committees will meet at least every 6-months to review plans and procedures. A map of the valley with numbered zones (to allow for quick identification of locations) river access & evacuation points and nearby medical facilities and contact details will need to be developed. This would be one of the tasks of the safety committee.

As a part of the risk and safety management plan, safety infrastructure should also be identified and developed in key tourism areas, such as trails, waterfalls, put-in/pull-out points, etc. Emergency equipment will also be required, including water rescue equipment in highly visited areas, emergency call boxes, first aid stations and weather/geological monitoring upriver for early warning of floods, etc. Regular monitoring of this equipment and safety infrastructure will be integrated into the standard operating procedures of the park's risk and safety management plan.

Clear signage and other informational materials will be installed in high visitor traffic areas. Tourism practitioners operating within the park or on Foundation managed lands will also be required to provide safety briefings for visitors before entering the park (guidelines provided in the park risk and safety management plan) and have certain safety equipment such as first aid kits, water safety/rescue equipment, GPS emergency beacons, etc. First aid certification will also be required for tourism practitioners conducting certain activities, such as rafting, guided nature-hikes, etc. within or affiliated with the park/Foundation.

Steps to success:

- Risk and safety management plan and program established
- Develop detailed emergency evacuation plans and map with clear routes, assembly points, and communication channels to guide staff and visitors during crises.
- Enact Emergency Response Training/ Swift Water Response Training for guides and staff

- Conduct regular safety drills and simulations to ensure staff and emergency responders are well-prepared for various scenarios.
- Collaborate with local communities to establish safety committees that monitor and address safety concerns within and around the park.
- Establish strong collaboration with local law enforcement, medical facilities, and emergency services for swift and coordinated responses.
- Position park rangers or tourism officers strategically as safety points where visitors can seek assistance, information, or help in case of emergencies.
- Install reliable communication systems, including emergency call boxes and satellite phones, to facilitate quick communication during emergencies.
- Install weather monitoring stations to provide real-time data on changing weather conditions, enabling timely decisions to ensure visitor safety.
- Establish a feedback loop for safety concerns and incidents to continuously improve safety protocols and strategies.
- Establish routine inspections of park infrastructure, including trails, bridges, and facilities, to identify and address potential safety hazards.
- Disseminate safety information through brochures, signage, websites, and visitor centers to educate visitors about potential risks and precautions.
- Place clear and informative warning signs at high-risk areas, such as steep trails, riverbanks, waterfalls and potentially dangerous wildlife habitats.
- Implement mandatory safety orientations for all permit holders, ensuring they are aware of park rules, potential hazards, and emergency procedures.

Location	Priority	Time to implement
Park & Valley	Short Term / High Priority	2024-2025

D.3. Legal & Institutional Enablers

To effectively manage tourism within the whole destination, it is recommended that a Vjosa Wild River National Park Foundation be established that will provide an umbrella for tourism as well as park management activities in the landscape. This entity is proposed as a collaboration between the Albanian government and supporting partners. When established, it will need the legal standing to implement tourism related activities and to form partnerships that will develop tourism sustainably in the region.

The exact structure and process are being assessed and will be confirmed by NAPA and the Ministry of Tourism & Environment, but whatever the decision, a Destination Management & Marketing Organization (DMMO) will be need to be formed as a unit of the Foundation. This unit will be responsible for the following:

- Tourism planning for the park and valley
- Management of tourism activities in the park and on Foundation lands, including permitting, concessioning and fee collection
- Tourism development and oversight on lands managed by the Foundation within the valley
- Tourism training and community tourism product development activities
- Tourism investment promotion
- Tourism marketing of the valley and park
- Risk and safety management for tourism in and around the park

It is proposed that the Foundation, in collaboration with local municipalities, establish a 'Vjosa River Tariff,' that supports the Foundation and park activities. For more information on fees please see the Park Business Model section. The Foundation would utilize the funds it receives to support tourism in the valley (therefore benefiting the residents and governments of the region where the fee was collected). It should be noted that this fee is not a tax on local residents, rather on visitors to the region. In fact, this tax, and expanded, higher value tourism in the area, will likely help to reduce the taxes local residents have to pay.

In parallel to this, there needs for all involved stakeholders, local and national, to push to enforce current regulations, especially relating to environmental regulations, so that the vision for sustainability and tourism in the valley can be achieved.

Steps to success:

- Form a dedicated Destination Management & Marketing Organization Team, under the Foundation, responsible for implementing this tourism master plan
- Work with local governments to establish a 'Vjosa Conservation Tariff' to channel funds to support implementation of tourism master plan, support the park and support municipality tourism efforts
- Enforce Albanian EP laws, speedtrack adoption of local EP bylaws to align with EU Acquis

VI. Consolidated Park Business Model

In addition to government financial support and, in the short and medium-term, support from donors, tourism is a significant and sustainable financing stream for the park and foundation operations. The information below provides illustrative projections on potential revenue from tourism for the park/Foundation over a 10-year period, once the park/Foundation is operational. These figures are indicative estimates based on the data available and are provided as an illustrative example of what might be achieved for the park/Foundation from tourism.

A comprehensive analysis and modeling of the tourism revenue opportunities for the Park/Foundation was not within the scope of the Tourism Master Plan. As mentioned in the 'Recommendations & Actions' section of this document, a high priority next step is the development of a comprehensive business plan for the park/Foundation that will focus on the recommended revenue generating activities proposed in this document. Analysis of each revenue stream as well as further detail and refinement of the illustrative financial projections provided below will need to be conducted during business planning.

The following goods and services can all generate an income for the Park/Foundation, and enhance the visitor experience (adding value to the tourism offer) without producing harmful impacts on the Vjosa River. As described in the 'Recommendations & Actions' section, it is recommended that most commercial services be outsourced to third party professional operators, for fees that are paid to the Park/Foundation. Some products and services may still be offered directly by the park/Foundation, depending on the final management structure established, and are illustrated below.

Base Case Scenario: Third party tourism services/products that may generate income for the park/Foundation

- Rafting & kayaking
- Educational excursions
- Research & education center (SAVE tourism initiative)
- Retail sales (Park/Foundation branded souvenirs, other retail)

Base Case Scenario: Park/Foundation Provided Services/Products

- Parking - strategically located car parking on durable surfaces

Additional Optimal Case Scenario: Park/Foundation Revenue Streams

- Visitor Center - restaurant/cafe, paid visitor attractions (equipment rental, etc.), venue rental
- Land lease (for accommodations, adventure park, camping, tour operations, etc.)
- Tourism Conservation Tariff

Additionally, revenue may also be generated through other programs in the longer-term, such as donations through travel philanthropy, virtual reality, etc. As these are longer-term and lower priority they are not included in projected revenues.

As the table on the following page shows, total revenues from the 'base case' tourism products and services have the potential to grow to around €270,000 in revenue per year within ten years. However there are other opportunities for revenue that are significant and outlined in the 'optimal' revenue table separately. These include additional revenue from services through the visitor center, land rent

and a Tourism Conservation Tariff. If realized, these revenue streams could add an additional €1.8 million per year to the park/Foundation revenues, but does require national and local government agreements to support park/Foundation ongoing efforts.

As is shown in the revenue tables, land rent and the Tourism Conservation Tariff hold the greatest potential long term revenue opportunities for the park/Foundation. Once established, these are also both passive revenue streams, meaning that they do not require significant management to maintain the revenue annually.

The land rent is based on the proposal for select, unutilized government land in the valley to be transferred to the Ministry of Tourism (or NAPA) and then the Foundation be granted management rights to these lands. The Foundation would then rent this land to encourage specific types of sustainable tourism businesses to be established in the region that support the overall goals of the Tourism Master Plan. The rental revenue from these lands would also sustain park/Foundation operations.

The proposed 'Tourism Conservation Tariff' would be established by each municipality in the valley and could add a significant and consistent revenue stream for the park/Foundation. The tariff is a distinctive fee from the local tourism tax that is currently collected by local municipalities, but will be collected through the same mechanisms already in place. The tariff will initially be set at €2 per visitor stay, that would go to the Foundation (tariff amounts could also be increased to provide additional revenue for local government, as the current tourism tax is quite low). Given the type of visitor that the designation is looking to attract, this amount will not have any significant impact on their decision to come to the destination.

As these revenue streams may take time to realize and the revenue implications are significant, they have not been included in the 'base case' projections, but are provided below as an estimate of potential revenue. Additionally, as the specific layout of the visitor center is not currently known, potential revenue from this facility is also separated out and included in the 'optimal' revenue scenario.

To realize these potential revenue streams, a focused and dedicated tourism team is needed, one that leverages partnerships with private tourism operators to align incentives and offer high quality tourism experiences to visitors. Costs are estimated in the table follows, including potential costs categories specific to the Destination Management and Marketing Organization (DMMO) that may be established through the Foundation. The costs are estimated based on the 'optimal' scenario, but would need to be scaled back if the land rent or Tourism Conservation Tariff were not realized.

Please see [Annex X](#), 'Tourism Master Plan Business Model & Product Matrix,' for more details on the projected revenue as well as tourism products and services.

A. Park/Foundation Illustrative Tourism Revenues (Base Case)

Base Case: Tourism Product/Services	Year									
	1	2	3	4	5	6	7	8	9	10
Rafting & Kayaking										
Estimated # business (permit holders)	6	8	10	10	10	10	10	10	10	10
Estimated # day-visitors/business	1440	1512	1588	1667	1750	2000	2000	2000	2000	2000
Total # Annual Rafting/Kayaking Visitors	8640	12096	15876	16670	17503	20000	20000	20000	20000	20000
Estimated Annual Permit Fee	€500	€500	€525	€525	€551	€551	€579	€579	€608	€608
Estimated Daily-Visitor Permit Fee	€10	€10	€12	€12	€14	€14	€16	€16	€18	€18
Total Estimated Revenue	€17,400	€19,120	€24,301	€25,254	€30,017	€33,513	€37,788	€37,788	€42,078	€42,078
Educational Excursions										
Estimated # business (permit holders)	5	10	15	20	20	20	20	20	20	20
Estimated # day-visitors/business	200	220	242	266	300	300	300	300	300	300
Total # Annual Excursion Visitors	1000	2200	3630	5324	6000	6000	6000	6000	6000	6000
Estimated Annual Permit Fee	€100	€100	€105	€105	€110	€110	€116	€116	€122	€122
Estimated Daily-Visitor Permit Fee	€8	€8	€10	€10	€12	€12	€14	€14	€16	€16
Total Estimated Revenue	€2,100	€2,760	€3,995	€4,762	€5,805	€5,805	€6,515	€6,515	€7,231	€7,231
Research & Education Center / SAVE Tourism Initiative										
Estimated # Beds	20									
Annual Bednights Available	7300									
Estimated Annual Occupancy			15%	25%	30%	40%	45%	45%	45%	45%
Estimated # Bednights Sold			1095	1825	2190	2920	3285	3285	3285	3285
Estimated Revenue Per Bednight Sold			€250	€250	€300	€300	€350	€350	€400	€400
Additional Estimated Conservation Fee/Night (% of revenue)	10%		€25	€25	€30	€30	€35	€35	€40	€40
Total Estimated Revenue			€27,375	€45,625	€65,700	€87,600	€114,975	€114,975	€131,400	€131,400
Parking										
Estimated number of parking spaces		50	100	150	150	150	150	150	150	150
Parking Spaces Available Per Year		18250	36500	54750	54750	54750	54750	54750	54750	54750
Average Parking Space Utilization		30%	50%	50%	50%	50%	50%	50%	50%	50%
Total Number of Parking Spaces Utilized		5475	18250	27375	27375	27375	27375	27375	27375	27375
Estimated Daily Parking Revenue Per Space		€1.5	€1.5	€2.0	€2.0	€2.0	€2.5	€2.5	€2.5	€2.5
Annual Operational Cost		€5,000	€10,000	€15,000	€15,450	€15,914	€16,391	€16,883	€17,389	€17,911
Total Estimated Revenue		€3,213	€17,375	€39,750	€39,300	€38,837	€52,047	€51,555	€51,048	€50,527
Retail Sales										
Estimated # Items Sold		2500	4000	5000	5250	5513	5788	6078	6381	6700
Average sale price per item (excluding tax)		€15.0	€15.8	€16.5	€17.4	€18.2	€19.1	€20.1	€21.1	€22.2
Cost of goods and related sales costs (75%)		€11.3	€11.8	€12.4	€13.0	€13.7	€14.4	€15.1	€15.8	€16.6
Estimated average return per item sold		€3.8	€3.9	€4.1	€4.3	€4.6	€4.8	€5.0	€5.3	€5.5
Total Estimated Revenue		€9,375	€15,750	€20,672	€22,791	€25,127	€27,702	€30,542	€33,672	€37,124
BASE REVENUE TOTAL	€19,500	€34,468	€88,796	€136,063	€163,613	€190,881	€239,027	€241,375	€265,429	€268,359

B. Park/Foundation Illustrative Tourism Revenues (Optimal Case)

The following revenue streams may be generated in addition to the ones listed in the 'base case' scenario.

Suplimentary (optimal): Tourism Product/Services	Year									
	1	2	3	4	5	6	7	8	9	10
Optional Commercial Visitor Center Attractions										
Food and Beverage lease (150 daily transactions, avg receipt 5 EUR)		€4,000	€6,000	€6,500	€7,000	€7,200	€7,500	€8,100	€8,750	€9,400
Paid visitor attractions (e.g. VR -drop console experience)		€2,000	€2,000	€2,000	€2,000	€2,000	€2,000	€2,000	€2,000	€2,000
Venue Rental for teambuilding and events.		€3,000	€3,240	€3,500	€3,700	€4,000	€4,400	€4,800	€5,200	€5,500
Total Estimated Revenue		€9,000	€11,240	€12,000	€12,700	€13,200	€13,900	€14,900	€15,950	€16,900
Land Rent (for targeted sustainable tourism investments)										
Estimated # Acres for Rent Under Foundation Management		20	40	40	40	40	40	40	40	40
Average Annual Rent Per Acre		€10,000	€10,300	€10,609	€10,927	€11,255	€11,593	€11,941	€12,299	€12,668
Total Estimated Revenue		€200,000	€412,000	€424,360	€437,091	€450,204	€463,710	€477,621	€491,950	€506,708
Tourism Conservation Tariff (per visitors per stay)										
Estimated Number of Accomodations (Whole Region)		585	700	800	900	1000	1000	1000	1000	1000
Estimated Number of Rooms (Whole Region)		2925	3500	4000	4500	5000	5000	5000	5000	5000
Estimated Number of Annual Room Nights (Whole Region)		1,067,625	1,277,500	1,460,000	1,642,500	1,825,000	1,825,000	1,825,000	1,825,000	1,825,000
Estimated Number of Stays (2.5 nights per stay)		427,050	511,000	584,000	657,000	730,000	730,000	730,000	730,000	730,000
Average Occupancy		20%	20%	25%	25%	30%	30%	30%	30%	30%
Average Tourism Conservation Tariff to Foundation		€2.0	€2.0	€3.0	€3.0	€4.0	€4.0	€5.0	€5.0	€6.0
Total Estimated Revenue		€170,820	€204,400	€438,000	€492,750	€876,000	€876,000	€1,095,000	€1,095,000	€1,314,000
SUPLIMENTARY (OPTIMAL) REVENUE TOTAL		€379,820	€627,640	€874,360	€942,541	€1,339,404	€1,353,610	€1,587,521	€1,602,900	€1,837,608

C. Park/Foundation Illustrative Tourism Costs

The potential cost categories below are illustrative, and based on the 'Optimal case' revenue scenario.

Operational Costs	Year									
	1	2	3	4	5	6	7	8	9	10
Staffing										
Tourism/Commercial Director	€30,000	€31,500	€33,075	€34,729	€36,465	€38,288	€40,203	€42,213	€44,324	€46,540
Permits, Concessions & Revenue Officer	€24,000	€25,200	€26,460	€27,783	€29,172	€30,631	€32,162	€33,770	€35,459	€37,232
Marketing Officer	€24,000	€25,200	€26,460	€27,783	€29,172	€30,631	€32,162	€33,770	€35,459	€37,232
Marketing Officer #2		€15,120	€15,876	€16,670	€17,503	€18,378	€19,297	€20,262	€21,275	€22,339
Retail & Partner Engagement Officer	€14,400	€15,120	€15,876	€16,670	€17,503	€18,378	€19,297	€20,262	€21,275	€22,339
Tourism Officers - Mid-Level	€14,400	€15,120	€15,876	€16,670	€17,503	€18,378	€19,297	€20,262	€21,275	€22,339
Tourism Officers - Junior-Level	€10,800	€11,340	€11,907	€12,502	€13,127	€13,784	€14,473	€15,197	€15,957	€16,754
Tourism Officers - Junior-Level	€10,800	€11,340	€11,907	€12,502	€13,127	€13,784	€14,473	€15,197	€15,957	€16,754
Visitor Center Staff - Mid-Level	€14,400	€15,120	€15,876	€16,670	€17,503	€18,378	€19,297	€20,262	€21,275	€22,339
Visitor Center Staff - Junior-Level	€10,800	€11,340	€11,907	€12,502	€13,127	€13,784	€14,473	€15,197	€15,957	€16,754
Total Estimated Revenue	€153,600	€176,400	€185,220	€194,481	€204,205	€214,415	€225,136	€236,393	€248,213	€260,623
Running Costs										
Office Rent	€12,000	€12,360	€12,731	€13,113	€13,506	€13,911	€14,329	€14,758	€15,201	€15,657
Office Supplies	€5,000	€5,150	€5,305	€5,464	€5,628	€5,796	€5,970	€6,149	€6,334	€6,524
Vehicle rental	€15,000	€15,450	€15,914	€16,391	€16,883	€17,389	€17,911	€18,448	€19,002	€19,572
Other Services & Subscriptions	€15,000	€15,450	€15,914	€16,391	€16,883	€17,389	€17,911	€18,448	€19,002	€19,572
Travel (local)	€5,000	€5,150	€5,305	€5,464	€5,628	€5,796	€5,970	€6,149	€6,334	€6,524
Equipment maintenance	€1,500	€1,545	€6,000	€1,600	€1,648	€7,000	€1,800	€1,854	€8,000	€2,000
Ongoing meetings & trainings	€5,000	€5,150	€5,305	€5,464	€5,628	€5,796	€5,970	€6,149	€6,334	€6,524
Accounting & Audit	€3,500	€3,605	€3,713	€3,825	€3,939	€4,057	€4,179	€4,305	€4,434	€4,567
Events	€5,000	€5,150	€5,305	€5,464	€5,628	€5,796	€5,970	€6,149	€6,334	€6,524
Total Estimated Revenue	€67,000	€69,010	€75,489	€73,174	€75,369	€82,932	€80,010	€82,411	€90,973	€87,463
Marketing / Promotion										
Base marketing	€250,000	€250,000	€50,000	€55,000	€60,500	€66,550	€73,205	€80,526	€88,578	€97,436
Additional marketing budget 50% of 'Tourism Conservation Tariff'	€0	€85,410	€102,200	€219,000	€246,375	€438,000	€438,000	€547,500	€547,500	€657,000
Total Estimated Revenue	€250,000	€335,410	€152,200	€274,000	€306,875	€504,550	€511,205	€628,026	€636,078	€754,436
Equipment & Furnishings										
Office Furniture	€15,000	€1,500	€1,545	€1,591	€10,000	€1,600	€1,648	€1,697	€15,000	€1,700
Office Equipment	€15,000	€1,500	€1,545	€1,591	€16,000	€1,600	€1,648	€1,697	€18,000	€1,700
Total Estimated Revenue	€30,000	€3,000	€3,090	€3,183	€26,000	€3,200	€3,296	€3,395	€33,000	€3,400
Total Estimated Costs	€500,600	€583,820	€415,999	€544,837	€612,449	€805,098	€819,647	€950,224	€1,008,264	€1,105,922

VII. Monitoring, Evaluation & Management

Monitoring and evaluation is a critical component for the park/Foundation to effectively manage tourism in the park and the border landscape. There are a number of layers for implementing a monitoring and evaluation program alongside implementation of the recommended actions within this master plan. These include:

A. Monitoring & Evaluating the Tourism Master Plan

This Tourism Master Plan and related action documents lay out the recommended actions and proposed schedule of activities for the implementation of the plan. Annually, the Foundation, should present the Tourism Master Plan and relevant years action plan to NAPA and Ministry of Tourism and Environment to outline what has been achieved in relation to the plan, gaps and issues as well as the plan for the coming year. This will allow parties to monitor progress, adapt action plans as needed and ensure that the overall vision for tourism in the destination is being achieved.

Additionally, either in the same meeting, or separately, the Tourism Master Plan and relevant years action plan should be presented to the public to update local residents on progress against the plan and present the plan for the upcoming year. This should also be recorded and made available online. The purpose of this annual presentation is to ensure the community are aware of the successes of the Foundation, know what is planned and are reminded of the overall vision for tourism in the destination.

B. Monitoring Implementation Within the Park

Tourism that occurs within the park will need to be closely monitored to ensure that potential impacts are mitigated, or at the very least minimized. The proposed carry capacity study for the park will provide the baseline as well as measurable limits for tourism that occurs in the park. An annual action plan will be developed by the park/Foundation that will outline tourism actions for the year as well as monitoring and evaluation activities. These may include the following:

- **Ecological monitoring** of the river for potential impacts due to tourism. This would be conducted by the Park Management Unit and/or supporting conservation or academic institutions, with the data reviewed at least annually. Potential impacts linked to tourism will be raised to the DMMO unit within the Foundation and strategies developed to address the issue
- **Visitor impact monitoring** will also occur. This will include photo logs, taken at specific times and locations during each year to document the condition of specific sites along the river. This may include put-in and pull-out points, swimming areas, and other sites. The photo logs will be gathered by Foundation staff and consolidated by a Monitoring and Evaluation staff member within the Park Management Unit. Photos will be reviewed at least annually to compare current year and past year photos for potential erosion, pollution, or other issues at the sample sites. Where issues are identified, more detailed analysis will be conducted, A monitoring plan, with specific sample sites will be developed by the Foundation
- **Visitor feedback** forms will be gathered through online surveys (QR codes) provided to visitors by the operators permitted to run tourism activities in the park, or in some cases by the park/Foundation itself. Permit holders will be required to provide these surveys to visitors as a part of their permit. The Permits, Concessions and Revenue Officer at the Foundation will

be responsible for analyzing the information gathered through the surveys at least every 3-months, to review feedback from visitors and be able to address issues that may arise. Templates and tools for monitoring visitor feedback will be developed as a part of the proposed Standard Operating Procedures for tourism in the park.

C. Monitoring Implementation Within the Valley

The Foundation will also monitor tourism in the broader valley destination, to understand the tourism dynamics within the valley and be able to adapt planning and implementation efforts to these dynamics. Monitoring will also help the Foundation tell success stories and the impact it is having in the landscape.

Monitoring efforts will include:

- Local employment from tourism (number and value of tourism employment, as well as direct and indirect employment projections)
- Number and type of tourism enterprises in the valley
- Average daily expenditure of visitors in the valley
- Average number of overnight stays in the valley
- Visitor satisfaction

VIII. Summary & Conclusions

The Vjosa Wild River National Park in many ways symbolizes Albania as a destination. Both are dynamic in their nature and diverse in their offerings, brimming with potential. Relatively young when it comes to tourism, both the Vjosa Valley and the VWRNP stand to benefit greatly from a guiding organization (Foundation/DMMO) to ensure values and best traits remain protected for generations to come, as well as for those already relying upon them today.

This Tourism Master Plan is designed to lay the groundwork for the development and management of tourism in the valley and park. Background on the region, industry, and report parameters are provided to clearly communicate the context in which recommendations have been tailored to best suit the needs of the destination. However, much in the way that the Vjosa River gradually adapts and shifts its course, so too is the proposed Tourism Master Plan designed as a working document that should be reviewed annually and adjusted as needed based on the context of the time.

Bringing a wild river to tourists without diminishing its inherent value and ensuring the local residents benefit from the formation of the new park is a challenge, but one that can be overcome with focused and thoughtful action. As a Master Plan this report adopts the wider Vjosa River Valley focus - not only the VWRNP - as the complete system necessary for tourism as well as the valley ecosystem to be sustained.

Sustainability is at the core of all recommendations provided within this document, supported by the necessities of tourism that include Financial, human capital as well as governance pillars. Within each pillar specific recommendations and actions have been proposed, with detailed action plans provided in [Annex X](#). Revenues are also projected, with a 'base case' scenario of €270,000 per year by 2033, and an optimal case scenario of over €2.5+ million per year if all recommendations are realized.

Next Steps

The Vjosa Tourism master plan is intended as an adaptive document, one that is acted upon and reviewed regularly and one that can adapt to different management structure scenarios currently being reviewed by NAPA. The action plan assigns responsibilities for the delivery of each action ([see action plans in Annex X](#)), along with estimated initiation costs and timescales.

Many of the actions require more detailed planning before implementation, examples include the detailed business plans for the park and visitor center, (operating costs and visitor traffic are just two key variables which can only be estimated once the location and design of park facilities have been decided). The strategy also calls for the development of specific product and marketing plans, both beyond the scope of this document, although recommendations have been made about the structure and steps needed to develop these plans.