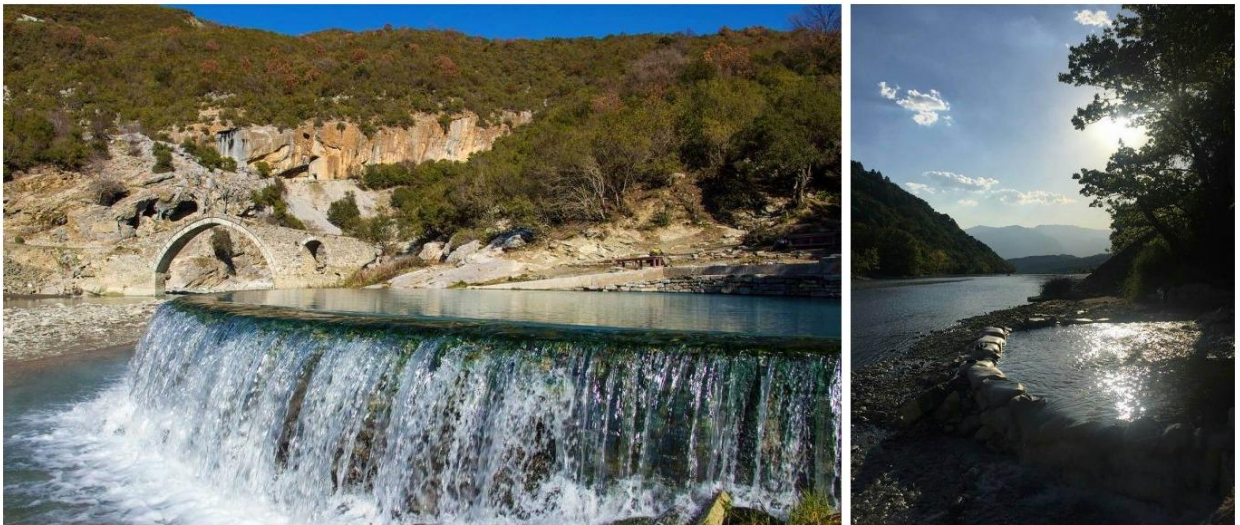


MASTER PLAN ON THE THERMAL SPRINGS IN THE CROSS-BORDER AREA



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Background

ALTTOUR project, attempts to integrate into the wider environment, functional links with existing comparative advantages related to cultural and natural resources, include them in route packets. To this end, the project action focuses on the organization of customized touristic packages which will include, focusing the visit to the spa as well as tours in other worthy to see places around the cross-border area. The project boosts the spa-tourism by promoting cross-border thermal springs.

ALTTOUR project is being implemented under the European Territorial Cooperation Programme INTERREG IPA CBC Greece - Albania 2014-2020.

Through project activities, the idea of boosting the spa-tourism by promoting cross-border thermal springs, will be based on Master Plans, Benchmarking Analysis, Place Branding techniques and capacity building of the cross-border area as a priority identified. This concept was further developed through in parallel in collaboration with other projects as well.

The Therapeutic Tourism is a selective form of tourism with significant economic advantages. It is the tourism form with the least negative effects of any adverse circumstances and it can be provided during a twelve-month season. The demand for spa tourism in Greece is characterized by strong seasonality, particularly in large spas. The same conclusions apply to the Albanian side with main characteristic the lack of modern and proper services and relevant infrastructures. The peak month for spa tourism is September, followed by August, unlike the rest of tourism which peak month is August. Although there have been important steps forward in both countries, the thermal resorts lagging behind their European counterparts mainly due to their management by local authorities and the non-interference of the private sector.

The study on the Master Plan on thermal springs in the cross-border area for the two pilot spa sites selected for Albania, is built upon the experience of Greece with the existing Master Plan on thermal springs for Ioannina region, elaborated some years ago, and being updated in the course of ALTTOUR project.

Assessment of the Legal Framework Governing Hydrothermal Resources

Procedure for the recognition and licensing of natural resources by the Ministry of Tourism and Environment

There is no particular set of legislative actions specifically designed for the recognition and licensing of thermal springs in the Republic of Albania. However, organic law governing water resource exploitation and management forms the basis of legislative action and practice implemented by the Ministry of Tourism and Environment.

The following legislation is relevant to the administration, exploitation and management of thermal water and the natural springs around them, as implemented by the relevant Ministry.

CHAPTER VI

CURATIVE, MINERAL, THERMOMINERAL AND GEOTHERMAL WATER SOURCES

Article 48

Management of natural resources of curative, mineral, thermo-mineral and geothermal waters

1. Integrated management of natural resources of curative, mineral, thermo-mineral and geothermal waters is concerned with the creation of a framework for the protection of these resources in order to:
 - a) monitoring of the quality of curative, mineral, thermo-mineral and geothermal waters by the ministry, the ministry responsible for health and the ministry responsible for the economy;
 - b) promotion of rational and sustainable use of these waters, which is carried out based on the long-term protection of natural resources, curative waters, minerals, thermo-mineral and geothermal;

- c) progressive reduction of pollution of natural resources of curative, mineral, thermo-mineral and geothermal waters, in order to prevent their further pollution;
 - d) prohibition of constructions around the areas of natural resources of curative, mineral, thermo-mineral and geothermal waters without the permission of the water resources management bodies;
 - e) prevention of discharges of curative, mineral, thermo-mineral and geothermal waters used and untreated on land, water and in the public sewerage system;
 - f) assessment of the causes of pollution of curative, mineral, thermo-mineral and geothermal waters;
 - g) drafting the curative water, mineral, thermo-mineral and geothermal water management plan by the water resources management bodies;
 - h) control around the areas of natural resources of curative, mineral, thermo-mineral and geothermal waters, which is performed by the bodies of water resources management;
 - i) prohibition of changing the destination of use of curative, mineral, thermo-mineral and geothermal waters;
 - j) prohibition of drilling and interventions in the area of natural resources of curative, thermal, thermo-mineral and geothermal waters;
 - k) prohibition of suction with curative, thermal, thermo-mineral and geothermal water pumps directly from the wellhead.
2. Every natural or legal person, who uses the natural resources of curative, mineral, thermo-mineral and geothermal waters, must be provided with a permit from the water resource management bodies, which is given in accordance with the management plan of these waters.
3. The Council of Ministers, upon the proposal of the Minister, approves the tariffs for the use of curative, thermo-mineral and geothermal waters.

Article 49

Suspension and temporary change of permit conditions for natural resources of curative, mineral, thermo-mineral and geothermal waters

1. The permit may be amended, suspended or revoked when its respective holder does not meet the criteria for granting this title or has violated the obligations set out in it.
2. The change of conditions, suspension and revocation of the permit are performed, as the case may be, by the body that issued it or the highest superior body:
 - a) when changes have occurred due to force majeure;
 - b) at the request of the permit holder;
 - c) in case of non-compliance by the holder of the permit conditions;
 - d) when the curative, mineral and thermal waters, to which the permit is related, have not been used according to the deadline defined in the respective permit;
 - e) upon the death of the natural person or upon the termination of the legal person.

CHAPTER VII

AUTHORIZATIONS, PERMITS AND CONCESSIONS FOR THE USE OF WATER RESOURCES

Article 50

Water resources administration and management bodies that issue authorizations, permits and grant concessions

1. Water resources administration and management bodies issue authorizations, permits and enter into concession contracts for water use, based on the principles of proportionality, efficiency and democratization, in the reduction of administrative barriers, as well as in

accordance with the procedures established by a special law or by decision of the Council of Ministers, pursuant to this chapter.

2. The Water Basin Council issues authorizations and permits in cases when the activity will be carried out within the territory of the Republic of Albania and within the boundaries of a single basin.
3. The National Water Council issues permits and authorizations in cases when the activity will be carried out within the territory of the Republic of Albania, but in an area that exceeds the borders of a basin.
4. The Ministry identifies the concession project based on the classification of water resources, water basin management plan and according to the procedures, criteria and conditions defined by legal acts of subsidiary.
5. Authorizations, permits and concessions for water use:
 - a) are personal and belong to the holder of the relevant license, authorization, permit, concession;
 - b) may not be transferred without the approval of the bodies of administration and management of water resources;
 - c) are valid for a certain period and are renewed according to a defined procedure;
 - d) may be amended, rejected, suspended or repealed on the basis of this law and bylaws in its implementation;
 - e) are issued after payment of a fee for administrative expenses;
 - f) are registered in the National Register of Permits and Authorizations, according to the respective legal and sub-legal provisions;
 - g) cannot be rejected without a reasoned decision of the administrative body that reviews the request for authorization or permit.
6. The Council of Ministers, pursuant to this law and law no. 10 081, dated 23.2.2009 "On licenses, authorizations and permits in the Republic of Albania", as amended, determines:

- a) special conditions of licensing, authorization and permission and accompanying documents, necessary, submitted for this purpose;
- b) the term of validity of the license, authorization and permit;
- c) procedures and deadlines for review and administrative decision-making;
- d) revocation procedures by administrative bodies.

Article 51

General principles for granting authorizations, permits and concessions

The authorization, permit or concession is issued only if:

- a) the activity of the natural or legal person, who is the holder of the authorization, permit or concession, does not negatively affect the use of water;
- b) is in accordance with the management plan of the respective water basin;
- c) does not lead to violation of water quality norms, defined in this law;
- d) does not lead to the violation of the respective environmental objectives, defined in this law;
- e) does not conflict with the program of measures provided under this law.

Article 52

Advantages in granting permits, authorizations and concessions

For the issuance of a permit, the authorization, concession, bodies of administration and management of relevant water resources are based on the following priorities:

- a) water supply to the population, including the requirements of industries located within the boundary line of inhabited centers and having a low level of consumption;
- b) uses for irrigation, agriculture and aquaculture;
- c) uses for electricity production through hydro resources;

- d) other industrial uses, which are not included in the above category, including mining uses;
- e) fishing;
- f) water transport;
- g) entertainment and tourism, including cruising for recreation;
- h) other uses.

Article 53

General conditions of authorizations, permits and concessions for water use

1. The authorization, permit or concession contract for the use of water contains the following general data:
 - a) the series, number and date of approval and entry into force;
 - b) data for identification of the holder;
 - c) the type of activity allowed and the purpose for which the water will be used;
 - d) the amount of water that can be used, referring to either a fixed volume or a part of the flow;
 - e) the volume of the return flow, if any, and the place where the return flow will be discharged;
 - f) the surface of the land, to which the use of water is related, in cases when the water will be used for irrigation;
 - g) the place where the activity is exercised, the action is performed or the public good is used;
 - h) restrictions on the exercise of the activity, on the performance of the action or on the use of the public good;
 - i) the period of validity of the license, authorization, permit or concession.

2. The license, authorization, permit or concession contract must contain the following general conditions, under which the operator is obliged:
 - a) to use water rationally, avoiding waste and not harming the environment;
 - b) use the waters only for the purposes for which the license, authorization, permit or concession contract has been granted;
 - c) pay all costs, taxes, fees related to water use;
 - d) to install or allow the installation of equipment for measuring the amount of water used, in accordance with the requirements set by the relevant body that issued the permit, authorization or concession;
 - e) record the volume of water used, including the return flow;
 - f) to provide data and information on the use of water whenever requested by the bodies in charge of water resources management.
3. Special conditions, accompanying documents, validity period, review procedures and decision-making are determined by a decision of the Council of Ministers.
4. The license and permit issued by the central institutions or independent institutions enters into force only after its publication in the Register of Licenses and Permits, unless the entry into force of the act approving it is related to its publication in the Official Gazette.
5. Water use permits are included in category III.6 of the annex of the Law No. 10 081, dated 23/02/2009 "On licenses, authorizations and permits in the Republic of Albania", as amended.

Article 54

Suspension and temporary change of the conditions of authorizations, permits or concessions

1. The authorization, permit and concession may be suspended or changed when the relevant holder does not meet the criteria for granting this title or violates the obligations set out in it.

2. Suspension and change of conditions contained in licenses, authorizations, permits and concessions are performed by the issuing body:
 - a) as a result of a drought order issued pursuant to this law;
 - b) when changes have occurred due to force majeure;
 - c) at the request of the holder of the title;
 - d) in case of non-compliance by the holder with the conditions of the authorization, permit or concession.

Article 55

Revocation and revocation of authorizations and permits and termination of the concession contract

1. Termination of the concession contract and revocation or revocation of authorizations and permits can be done in cases when:
 - a) based on the public interest and in accordance with the water basin management plan, it is necessary to use the waters for another primary purpose, in accordance with the categorizations, according to the priorities defined in article 52 of this law;
 - b) the holder of the authorization, permit, concession does not respect the relevant conditions even after the suspension of the permit, authorization for a certain period;
 - c) at the request of the holder of the authorization, permit, concession;
 - d) the waters to which the permit, authorization or concession is related, have not been used for a period of three years;
 - e) with the death of the holder or with the termination of the legal person.
2. Any decision of local water resources management bodies to revoke or revoke the authorization, permit may be appealed administratively to the Minister, according to the procedures provided in the Code of Administrative Procedures, except in the case provided in letter "d" of point 1 of this article.

3. The administrative act of the minister for the revocation or revocation of permits or authorizations can be appealed in the competent court within the legal deadline.
4. For appeals against the procedures of granting the concession and termination of the concession contract, the legislation in force on concessions will be applied.

Article 56

Professional drillers

1. The professional water drill, which operates on a commercial basis, must be equipped with the license provided in category III.7 of the annex to the law on licenses. This activity licensed according to Law No. 10 081, dated 23/02/2009 "On licenses, authorizations and permits in the Republic of Albania", as amended.
2. Water resources management bodies issue permits for drilling after the professional driller presents the technical and hydro-geological project for drilling, drafted by legal entities, licensed pursuant to the legislation in force.
3. The professional drill, no later than one month after the completion of the drilling, submits to the water resources management bodies, in two copies, a detailed hydro-geological report regarding the drilling, with the samples of the drilled layers, as well as all the documentation; respectively, the initial drilling project and the post-drilling report. Water resources management bodies send a copy to the Central Geological Archive.
4. The Albanian Geological Survey should provide the relevant information to the water resources management bodies for the hydrogeological projects and drilling relations, submitted by the subjects at this institution.
5. The exploitation permit for water extraction is issued by the water resources management bodies, as the professional driller presents the technical and hydro-geological report for the potential use of the well, drafted by licensed legal entities, according to the legislation in force.

6. It is prohibited to carry out drilling activity for water extraction by natural, legal entities or unlicensed persons, without the relevant drilling permit from the water resources management bodies.

Ownership status

As defined in the relevant legislation, the following are owned by the state and administered by state bodies:

- a) all water resources of the Republic of Albania;
- b) all beds and banks of rivers, streams and other natural streams, whether temporary or permanent, curative, mineral, thermo-mineral and geothermal waters, canals, lakes, ponds, lagoons and natural or artificial catchments, islands and agglomerations; sand, rocks and soils in river beds, lakes and catchments, as well as geological formations of groundwater;
- c) land obtained from the withdrawal of water or from the progress of land in the direction of water, when it is connected with the land, which is owned by the state;
- d) all structures and hydro-technical works carried out by the state, such as dams, irrigation systems, drainage and navigation, drinking water stations and canals, as well as works related to them.

The right of state ownership, according to the definitions in letters “a”, “b” and “c” of point 1 of the Law Nr. 111/2012 on the “Integrated Management of Water Resources”, is inalienable and statute-barred.

Assessment and Analysis of the Characteristics of Existing Conditions

Analysis of Present Situation in Bënjë

Located approximately 120 km away from the Ionian coast of the Albanian Riviera and the town of Sarandë, the natural thermal springs of Bënjë in southeastern Albania, represent a better opportunity during the cold months of the year. It was not long ago that Bënjë's thermal springs were an overlooked landmark. However, in recent years they have caught the attention of Albanian and international visitors that travel to the south during the summer season. For this reason, there are periods during the year when the place gets overcrowded.

The springs are located in the southern portion of the Krujë Geothermal Area. There are eight springs in Bënjë, four on the right bank of the river and the other four are situated on the left bank of the Langaricë River Canyon. Their water temperature usually ranges from 23°C to 30°C. The water temperature of the springs on the right bank of the river ranges from 23°C to 26°C. The separate thermal springs of which the thermal bath area is composed are usually situated at 1 to 3.5 meters above the river bank.

Springs situated on the right bank of the river

- Spring 1 is located 25-30 meters from the “Ura e Katiut”, and 20 meters from the river bed. Its water temperature averages 26°C.
- Spring 2 is located 8 meters from the bridge and is situated at 8 meters from the river. The blue color of the water makes it easy to spot.
- Spring 3 is located 25 meters from the bridge and 15 meters from the river. The spring is above the river level and the water temperature is around 26°C.

- Spring 4 is located 150-200 meters from the bridge, on the right side of the canyon, where it reaches a width of 20 meters. The spring is above the river level and the water temperature averages 23°C.

Springs situated on the left bank of the river

- Spring 5 is located 300-400 meters from the bridge's upper side, right in front of the entrance of the canyon. The water temperature reaches 30°C.
- Spring 6 is located at the foot of the bridge, situated approximately 4 meters from the river bed. Its water temperature reaches 30°C.
- Spring 7 is located at seven meters away from the bridge, close to the river, with a water temperature averaging 30°C.
- Spring 8 is the largest spring and is located 20-25 meters from the bridge. The water temperature reaches 30°C.

The springs possess healing properties for the skin, the digestive system, as well as connective tissue disorders. Therefore, besides enjoying the natural beauty of the Bënjë area and Langaricë canyons, visitors also flock to the destination for the springs' healing properties.

Stemming from the large number of daily visitors, some minor road infrastructural upgrades have been conducted, and a parking lot was built for cars and camping vehicles. Most travellers to the area are daily visitors, and hence no major lodging infrastructure has been built. Lodgers mostly use limited spaces for camping sites or choose accommodation structures in the areas nearby, such as the town of Përmet.

Transport and parking fees:

- Parking for small vehicles – 200 ALL/day (~1.60 EUR);
- Town of Përmet to Bënjë by local bus – 800 ALL/day (~6.50 EUR);
- Bike rent – 100 ALL/day (~0.80 EUR).

This income is mostly used for maintenance work.

Analysis of Present Situation in Vronomero-Sarandaporo

The lesser-known springs of Leskovik are located on the northern side of Sarandaporo, on the Albania-Greece border, 10 km south of Leskovik.

Also known as Vronomero springs, these thermal waters contain an abundance of minerals that help treat many ailments. Their temperature ranges from 29 to 40 degrees Celsius.

These thermal baths are considered a somewhat "secret treasure" not only of Leskovik, but of the whole country, but the level of their exploration still remains low compared to other sources in the country. The spring temp is approximately 27.6 degrees and the water is potable.

Properties of the Vronomero-Sarandaporo Thermal Springs

Temperature: 27.6°C (80.06°F);

Municipality: Kolonjë

County: Korçë

Coordinates: Longitude: 20°40'18' E; Latitude: 40°5'54' N

Flow: >10 (l/sec)

Përmet

General Overview

Përmet Municipality is located in south-eastern part of Albania and its centre is the Përmet city. It belongs to the Gjirokastra County. The Municipality was formed at the 2015 local government reform by the merger of the previous Municipality of Përmet and the former communes of Çarçovë, Frashër, Petran and Piskovë Center, which now are administrative units. The area of the Municipality is 601.95 km² and 49 villages are part of it.

Përmet city centre has gone recently through an urban renovation of a new reconstructed city centre and pedestrian area offering a suitable space for social life and tourist activities.

Përmet has road access along the Vjosa River from both sides, linking it with the road SH4 Levan-Gjirokastra and on the other side with the road SH75 Leskovik-Erseke-Korca. Distance from Përmet to Gjirokastra is 60 km, while distance to the Greek board is 35.5km. Two local road segments link the village of Frashër with the main road to Përmet city: 1) dirt road that passes through the territory of Fir of Hotove-Dangelli National Park (poor and not well maintained) and 2) road from Përmet city passing near Bënjë thermal pools. The road distance between Përmet city and the rangers' hut of Fir of Hotove-Dangelli National Park is 27 km. Bënjë thermal pools have a good road access from Përmet city with a distance of 13 km. The rest of the roads access to the majority of the Municipality's villages is very bad or with no road connections.

The intercity transport is based on the activity of licensed transport companies. The taxi service is offered by private taxi drivers.

The territory of Përmet Municipality is dominated by a hilly-mountainous terrain with evident and drastic changes in climate condition with increase of altitude. The winter is cold and the

summer is fresh. The precipitation is abundant during the year, mostly during autumn and winter. There are 206 rainy days, while quantity of the precipitation is 1,853 mm per year. The average temperature in January is 6°C, while the average temperature in August is 28°C. Përmet records a total of 3,094 sunny hours yearly.

Përmet Municipality, due to its location in the extreme south-east of the country, belongs to the very authentic and still less developed region of Albania. Within the urban structure of Përmet town there is the “Historic Centre” preserved with its narrow-cobbled paths and examples of vernacular stone architecture. Also, some of the villages still preserve the character of the vernacular stone architecture.

The city has a rich cultural heritage and preserves many of its traditions and customs. Përmet is known for the traditional lyric songs accompanied by “saze” band instruments, hospitable people and distinguished cuisine, especially production of gliko, wine and raki.

The Fir of Hotova-Dangelli National Park is another distinctiveness of Përmet Municipality offering possibilities for adventure and nature-based tourism activities. The Thermal Waters in Bënjë flow naturally and rise to the surface in the form of six natural bathtubs with curative effects.

In 2017, according to INSTAT there were 767 registered businesses in the Municipality of Përmet, out of which 45% were businesses relying on services (trade, transport and storage, accommodation and food service, information and communication, other services). 45.1% of registered businesses were engaged into agriculture, forestry and fishing businesses, 9.9% in industry and construction.

Although the service sector represents the highest employment rate, agriculture represents the main economic sector and is characterized by small scale development. Fruit trees in the mountainous area and vineyards in the valley are characteristic for Përmet's agriculture. Also,

livestock farming, together with agriculture, is one of the main economic sectors for the rural population of the Municipality. Agro-industry is mainly based on processing of gliko, jam, wine and raki. Although this sector employs a small percentage of the population, it is considered as a great opportunity for the economic development of the Municipality. The municipal territory is rich in medicinal plants too.

According to the Draft Territory Development Plan for Përmet Municipality, the total population, as referred by new administrative composition (Census 2011), is 9,868 inhabitants (2016) in a total area of 601.65 km². Administrative Unit of Përmet accounts for more than 55% of the population of the Municipality, while the administrative units of Çarçovë and Frashër have the lowest number of inhabitants, not exceeding 900 inhabitants per administrative unit.

The average population density of the Municipality of Përmet is very low with about 16 inhabitants per km², a value six times lower than the average national density of 97 inhabitants per km², while the city of Përmet has the highest population density with 2,888 inhabitants per km².

According to the Draft Territory Development Plan for Përmet Municipality, the age group 15-64 years old accounts for 65% of the Përmet population, while the age group 0-14 years old represents 12% and the age group older than 65 years of age represents 23%. Përmet administrative unit records the highest value with 38% of the unemployed working age population. Unemployment mainly affects young people, as 60% of the 15-24 age group of Përmet Municipality is registered as unemployed, exceeding the national average of 53%. The administrative units of rural character, such as Çarçovë, Frashër, Piskovë Centre and Petran, have an unemployment rate of not more than 20%.

Përmet Municipality is facing a high rate of migration. A considerable number of people migrate from rural to urban areas and Greece. As referred to the Draft Territory Development Plan for Përmet Municipality, according to Census data 2001 and 2011 it is shown that 28.6% of the

current resident population of Përmet Municipality has migrated within a 10-year period. While comparing the data from Census 1989 with those of 2011, this figure is around 35.4%.

Accommodation and tourism supply

According to the data provided by the Ministry of Tourism and identified additional accommodation establishments via online travel platforms, there are 14 hotels and 7 guesthouses in Përmet Municipality with a total of 362 beds capacity, out of which 90% is in hotels.

Table 5 Registered and identified capacity of accommodation establishments in Përmet

<i>Type of establishment</i>	<i>Number of establishments</i>	<i>Number of beds</i>	<i>Accommodation structure in %</i>
<i>Hotels</i>	14	326	90%
<i>Guesthouses</i>	7	36	10%
Total	21	362	100%

The accommodation businesses are mostly small and medium enterprises run as family businesses.

Referring to the interviews carried out with the accommodation establishments during the field mission, the ADR was 25 - 35 EUR for double rooms and 45-55 EUR for suites.

Key attractions in Përmet

Përmet attractions can be summarized as following:

Cultural attractions

Monuments	<i>Permet's Historical Centre (old quarter), Castle of Belonge, Bridge of Kadiu, Bridge of Ram (Dashit)</i>
Museums	<i>Museum House of the Frashër Brothers Hall of the Congress of Permet</i>
Vernacular architecture	<i>Villages: Borockë, Bënjë, Buhal, Kosinë, Leusë, Lipë, Lliar, Ogdunan, Kosovë</i>
Sacral heritage attractions	
Churches	<i>St. Mary Church of Leuse, St. Mary Church of Kosina, St. Mary Church of Bënjë, Church of St. Premtes, Church of Dëllia in Buhal</i>
Tekkes	<i>Tekke of Alipostivan, Tekke of Frashër, Tekke of Permet</i>
Natural attractions	
Mountains	<i>Fir of Hotove-Dangelli National Park Dhëmbel (peak 2,080 m) - Nemërçkë (2,585 m, Peak of Papingu) Mountains ridge, Dhëmbel Mountain</i>
Rivers and canyons	<i>Vjosa River, Lumnica River and Kamencka's canyon, Lengarica stream and canyon, Çarçovë stream, Sopoti waterfall, Black water source of Këlcyra</i>
Water sources	<i>Bënjë Thermal Water sources</i>
Monuments	<i>City Stone</i>

Gastronomy	
Infrastructure	<i>8 restaurants, wine tasting rooms, cheese tasting room, gliko tasting room</i>
Cuisine	<i>Traditional and Mediterranean, Gliko, wine, raki</i>
Local ingredients	<i>Vegetables, honey, fruits, dairy products, meat Authentic grape varieties: Debin, Sinambel and Pulezi</i>
Events	
Cultural	<i>Multicultural Festival</i>
Gastronomy	<i>Wine Festival</i>
Honor of Permet	
Personalities	<i>Frashëri Brothers (Albanian Renaissance), soprano Tefta Tashko Koço (1910 – 1947), master of “saze” Laver Bariu (1929 – 2014)</i>

Tourism growth and demand

In order to estimate number of visitors and overnights, occupancy rates and average length of stay, found out during interviews, were used. Thereby, a total number of 17,884 arrivals in Përmet were estimated for the year 2017 with a total of 28,424 overnights. Average length of stay in Përmetis 1.6 nights on whole year basis. The average occupancy of the accommodation establishments in Përmetis reflecting the seasonality pattern. Occupancy rates are around 50%

during the peak months, around 40% during the months of June and September and very low during the spring and winter months. A number of businesses operate seasonally and mainly close in the winter.

The seasonality in Përmet is considered as sharp and there is a notable seasonality pattern, beginning from June to the end of September with peak in July and August. There are more organized groups (60-70%) from April to end of October, with peak during June to August, and more individuals in the period June to August.

According to the interviews with tourism businesses during the field mission in Permet, two groups of guests were identified:

- Overnight tourists:
 - Individuals, mostly Albanians, with overnight in Përmet town with the purpose of visiting Bënjë thermal baths, relaxation and gastronomy. They mostly stay 1-2 nights and some up to one week.
 - Package tours of foreign tourists with one overnight in Përmet coming with the purpose of visiting culture and sacral heritage, Bënjë thermal baths, town tour (old quarter) and possibly visiting a vinery, cheese factory and gliko factory;
 - Individuals and package tours spending 2-4 nights in Përmet town with the purpose of active and adventure activities in nature (hiking, cycling, rafting, trekking);
 - Pilgrim tourists who participate in pilgrimages at Alipostivan Tekke (14th of May) and also those visiting the churches;
 - Business tourists with overnight in Përmet town.
- Same day visitors:

- Individuals and Package same day tours of foreign tourists coming with the purpose of visiting culture and sacral heritage, Bënjë thermal baths, town tour (old quarter) and possibly visiting a winery, cheese factory and gliko factory;
- Individual, mostly Albanian same day visitors coming to enjoy gastronomy and visit Bënjë thermal baths.

According to the interviews done with tourism businesses during the field mission in Permet, the main source markets are Western Europe (Germany, Austria, France, Netherlands, Italy, etc.) and Eastern Europe (Poland and Czech Republic). The rest are Albanian citizens and expats.

There are differences in guest behavior and motives for travel:

- Tourists who stay in Përmet are mostly adventure tourists, visiting the National Park, do rafting in Lengarica canyon and also visit thermal baths.
- Foreign individuals' motives are mainly connected with cultural and sacral heritage with active nature-based activities.
- During July and August domestic Albanians stay longer, even for a week because they visit Bënjë thermal baths.
- Tourists traveling in tours organized by travel agencies for active adventure are younger, while individuals are mixed.
- Tourists traveling in tours organized by travel agencies for the purpose of visiting culture and sacral heritage are 60% third age travellers while the rest is a mix of generations.

According to PIUTD baseline survey conducted by the World Bank, daily expenditure of guests in Përmet was 35 EUR.

According to the interviews done with restaurants during the field mission in Permet, the average check paid by individual tourists in restaurants is 7-12 EUR and for groups is 15 EUR for 3 course menus.

Historic Evolution, Curative Potential and Classification of Thermal Baths

Traditional therapeutic and thermal tourism consists in the use in different ways of waters with therapeutic properties. The origin of thermalism in the Mediterranean basin is very early. This has been proven by archaeological discoveries, literary, scientific evidence and many epigraphs.

Health care has been one of the main travel motives for the ancient Greeks and Romans. In ancient Greece there were public and private "baths". Publics were built in open spaces, near residential buildings, while entry was made for a reasonable fee. The ancient Greeks thought that hot water and steam coming from the depths through mineral springs had healing and supernatural powers. It is no coincidence that important temples such as those of Olympus and Apollo at Delphi were built near mineral springs. Hypocrite himself in his work "Uso dei liquidi" encouraged the protection of mineral resources.

The use of mineral thermal waters in ancient times was an element of the way of life and customs of the Romans. In Rome, the Greek term "therma-thermos", meaning "hot", began to be used. This term meant mineral thermal waters with healing properties and all kinds of baths.

Public baths appeared in Rome during the 2nd century b.c., but began to be used to cure the body in the 3rd century b.c. The Romans replaced the Greek model of "simple baths" with a complex system of services.

Tabela 1: *Clasification of thermal baths in Ancient Rome*

Classification	Construction type
<ul style="list-style-type: none"> - Exclusive baths reserved for a small number of people; - Open baths for a large number of people, separately reserved for males and females; - Large baths reserved for emperors, royalty and other nobility. 	<ul style="list-style-type: none"> - Calidarium (hot baths); - Frigidarium (cold baths); - Lepidarium (prepares the body for higher water temperatures); - Laconicum (type of sauna).

Agrippa, during his reign (33 BC) managed to provide free thermal baths to the inhabitants of Rome. He built baths that bore his name. Nero, Trajan, and Diocletian did the same. The baths of Constantine were built in the 4th century BC. The "big baths", enriched with libraries, museums, gardens, etc., quickly became the centers of mundane life.

The well-known expression "mens sana in corpore sano" (healthy mind in healthy body) belongs to the flowering period of thermal baths. 800 public and private thermal plants were erected in Rome. They were visited by the most famous personalities of the time such as: Seneca, Titlivi etc. Roman physicians: Pliny, Celso and Galeno confirmed the healing values of the waters and tried to classify them according to their physicochemical and pathological characteristics.

In antiquity the population used elements of healing the body, which enabled its physical and overall well-being. This tradition continues to be preserved today, enriched with new nuances. Consequently, therapeutic and thermal tourism occupies a special place in the tourist offers of many countries.

While in Greece therapeutic cures were performed in thermal mineral waters, in Rome the cures were accompanied by elements of "well-being".

The importance of thermal baths began to fade with the spread of Christianity. Some of Rome's great baths disappeared due to the ruralization of life.

The healing properties of the essential oils, have long been known in the 1300's thanks to the development of medicine, which at the time was highlighting the importance of their healing properties. In that period, the role of "medical advisors" in thermal services was defined.

At the beginning of the 13th century, empirical assessments and the first hydrological studies were carried out by researchers and doctors. Pietro D'Albano and Michele Savonarola are mentioned in Europe, who in their studies describe the medicinal qualities of the most popular thermal mineral springs at that time.

The term "ville d'eau" in Europe is associated with the use of mineral thermal springs in the 14th century, which continued in Italy for several centuries. This type of tourism was simple compared to the model of "loisir" cities in England, which flourished in the XVIII century, the most successful of which was Bath. The English tourist cities of the 1700s welcomed visitors to the thermal parks, offering them other facilities such as theaters, cafes, restaurants, hotels, etc.

The curative tourist infrastructure in England was initially set up by the nobles of the time. Customer advance payments were used for its maintenance. Investments in this sector later passed into the hands of national state capital and, during the nineteenth century, local and central governments supported public services, helping to promote curative tourism, protect the environment, and control prices or construction. This practice was also supported in Italy, France, Spain, Austria, etc., which gradually, moved to the therapeutic and thermal tourism of modern times, which relies on the application of experimental methods and contemporary information about thermal cures.

The two world wars diminished the influx of visitors to curative structures. They resumed their functioning after the LDB, known as the period of "curative social tourism". Therapeutic and thermal tourism was included in national health systems, assistance services and health care. Therapeutic treatments were offered for a fee by the state to all sections of the population.

Tabela 2: *Historical stages of the development of curative tourism*

Nr	Stages of development of global tourism by era	Stages of development of the therapeutic and thermal tourism industry	Stages of development of therapeutic and thermal tourism in Albania
1	Early forms of tourism: Ancient Egypt, pilgrimage, etc.	N/A	N/A
	Ancient Greece	Thermal baths in Ancient Greece	N/A
	Roman Empire	Ancient baths in the Roman Empire	Frequenting thermal baths built by the Romans
2	Middle Ages	Lack of body	Turkish baths

		care	
3	European Renaissance	Revival of body care as a result of advancements in medicinal sciences	N/A
	Grand tour	N/A	N/A
4	Elite tourism	Elite care	Very little elite tourism
5	Social tourism	Medicinal character, support by the development of healthcare services	Mostly focused on health services and healthcare centers
6	Massive modern tourism	Therapeutic and thermal tourism and Wellness	Fewer wellness elements

Theoretical Concepts Applied to Thermal and Medical Tourism

The treatment of the development of therapeutic and thermal tourism in TSH raises the need for its theoretical analysis according to the criteria set out in geographical tourism studies. How is therapeutic and thermal tourism conceived in Europe and in Albanian territories?

Understanding of therapeutic and thermal tourism and the difficulties in its definition for the Albanian territories

Tourism appears complex both in theoretical studies and in the field of applications and practice. It is considered today a driving factor with various effects on the economy, society, culture, environment, etc. As such, tourism is the subject of theoretical treatments for sociologists, anthropologists, geographers, writers, economists, architects, environmentalists, etc.

Tourism consists of moving people from their place of residence to another place, where they stay at least one night, to spend their free time or work.

This is one of the definitions of modern tourism, which includes all its elements: place of departure, relocation, duration, motivation, etc.

There are many definitions that rely on the movement of tourists, the free movement of persons at the border, new trends in tourism, etc. In this context, defining what tourism is is extremely complex. This is also true for the definition of curative tourism.

The tourist phenomenon, in the variety of forms in which it is presented, requires different ways of study. In addition to the reorganization of general data on tourism, studies to date have focused on more specific topics, such as curative thermal tourism, which is defined as: tourism based on the curative values that certain countries in the world have. People who practice this type of tourism aim to maintain and improve health.

Therapeutic and thermal tourism consists in the displacement of a category of people from the place of residence to other places, in order to cure any disease, improve physiological and health abnormalities in general.

Some authors define tourist destinations and the main types of therapeutic and thermal tourism based on motive and country:

- Traditional TK, which consists of the use of thermal mineral waters. Its beginnings are in antiquity. The places where it is applied are called spas and terms.
- Curative mountain tourism related to clean air and healthy climate. It is mainly applied by people with respiratory diseases, the elderly and those who want to have better health.
- TTC and welfare, which combines traditional therapeutic and thermal tourism with recreational and entertainment elements. Applied mainly by people with above average incomes.
- Beach tourism (thalassotherapy) consists of taking advantage of the sea, beaches and coastal climate for relaxation and improving health under the effect of sun, sand and water.
- Therapeutic tourism, which developed in the late twentieth century, is applied mainly by high-income people, who attend tourist-medical centers to keep the body in good shape and even to provide "eternal youth". Cures include massages and surgical interventions.

TTC today is identified with the movement of people towards curative centers not only for the cure of pathologies, but also to ensure the well-being of the body and mind. Terms such as the Wellness SPA have recently been included in this area.

The main motive that pushes TSH residents to visit curative centers is "improving health".

For the definition of therapeutic and thermal tourism in TSH hinder:

- lack of sources of information and proper studies for this type of tourism in TSH;
- orientation of tourist movements for curative purposes mainly towards thermal mineral springs and less towards mountainous areas;
- the fact that seaside tourism is seen more in the context of vacations and sunbathing, than the cure of diseases under the effect of sand, water, air and sun.

This study focuses on the potentials and development of therapeutic and thermal tourism in mineral thermal centers, known as traditional therapeutic and thermal tourism (spa tourism). It emphasizes that mineral water has been used for health purposes for more than 10,000 years. About 100 million people visit thermal-mineral healing centers in Japan every year. In Germany, Turkey and Hungary there are about 10 million bath attendees. In Russia the figures reach 8 million, Switzerland 800,000, France 700,000 and Spain 400,000. The 210 U.S. baths are frequented by 4.5 million tourists a year.

Therapeutic and thermal tourism positively affects the socio-economic development of the areas that enable it. It increases the opportunity for local employment, income growth and holistic development.

Therapeutic and thermal tourism is one of the best opportunities for economic and social development of settlements or local units that have the potential to apply it. It enables the diversification of income sources, increases the mobility of the population and tourists, enlivening the socio-cultural life of the community. It serves as a promoter for the development of agriculture, livestock, handicrafts, trade, cuisine, etc. Therapeutic and thermal tourism promotes the vocational education of young people, improves the cultural level of the inhabitants of tourist centers and intensifies the communication between them and tourists. This development strengthens the identity of the territories where the curative centers are located.

Therapeutic and thermal tourism enables the provision of jobs for the community. In today's conditions, when the first and second sectors of the economy need less manpower as a result of mechanization and automation of work processes, the third sector, which includes tourism, can generate sufficient jobs, especially for young people. Curative tourism, with its specifics, not only provides employment to the community, but also promotes the qualification of staff to better adapt to the growing demands of visitors and new trends in tourism.

Therapeutic and thermal tourism helps increase income, bringing benefits to residents of areas with curative potential. The revenue generated strengthens the local government budget and can be used to improve infrastructure and services for the community.

Therapeutic and thermal tourism improves the image of curative areas, making it unique and attractive. The image of curative areas in TSH leaves much to be desired. Indiscriminate use of thermal springs by the inhabitants of the area has been accompanied by degradation, pollution of thermal springs and deterioration of the tourist image. With the intervention of the central and local government, ADF and various organizations, development plans have been drafted in many areas which have provided measures to regulate their image.

Therapeutic and thermal tourism promotes the curative values of territories, countries, regions and beyond, influencing the increase in the number of domestic and foreign visitors. The benefit is manifold: recognition, income increase, intercultural integration, self-confidence in national values, economic development, etc. In addition, the cultural values of the respective communities are promoted.

Development and Trends of Thermal and Medical Tourism in Europe

In the European and world context, the therapeutic and thermal tourism sector is marking an improvement after the general decline it suffered in 2008-2009. In Europe curative areas are classified:

- curative areas (centers) that enable the treatment and prevention of diseases in their pathological stage. Treatment is assisted by funding or reimbursements of health services;
- private curative areas (centers) the same as the first, but at the expense entirely of visitors;
- curative areas (centers) that receive visitors in order to ensure "well-being";
- areas (centers) that receive dual-purpose visitors: that of disease prevention and "well-being". Visitors undergo traditional treatments interspersed with recreational activities.

For the period 2008-2010, the number of traditional visitors attending these centers has decreased (0.9%). An increase was recorded in the number of visitors moving for “welfare” purposes (3.1%) and those with the common goal of traditional welfare (0.5%).

Today's trends are enabling the transition from being just therapeutic and thermal tourism to "welfare" tourism. This transition is accompanied by a change in curative structures, tourist destinations, the influx of visitors, their age and the increase of "welfare" services.

The following table helps to distinguish between "traditional curative tourism" and "welfare" (tourist offer, accommodation, services provided, age of visitors).

Tabela 3: *Differences between traditional thermal and medical tourism and “wellness-type” tourism*

Features and conditions	Traditional thermal and medical tourism	“Wellness-type” tourism
Objectives	Care for prevention and primary and secondary healing of	Taking care of the body’s wellbeing, ensuring physical and

	pathology	psychological relaxation
Role of the physician	Very important	Not relevant
Main motivation	Consultation by a doctor and support opportunities from national health services	Patient's personal initiative
Application and rules	The "cure plan" must be respected strictly and be followed by the doctor	The manner, duration and frequency of treatments are chosen at the request of the patient or visitor
Duration	From 2-3 weeks according to recommendations from the doctor	2-4 days
Therapy	Curative medicine accompanied by balneotherapy, climatology and physiotherapy	Massages and "beauty care" elements that very rarely require presence of the doctor
Control	Medical quality assurance is very important	Medical quality control is of no relevance
Accommodation	The quality of the accommodation	Visitors have high demands on

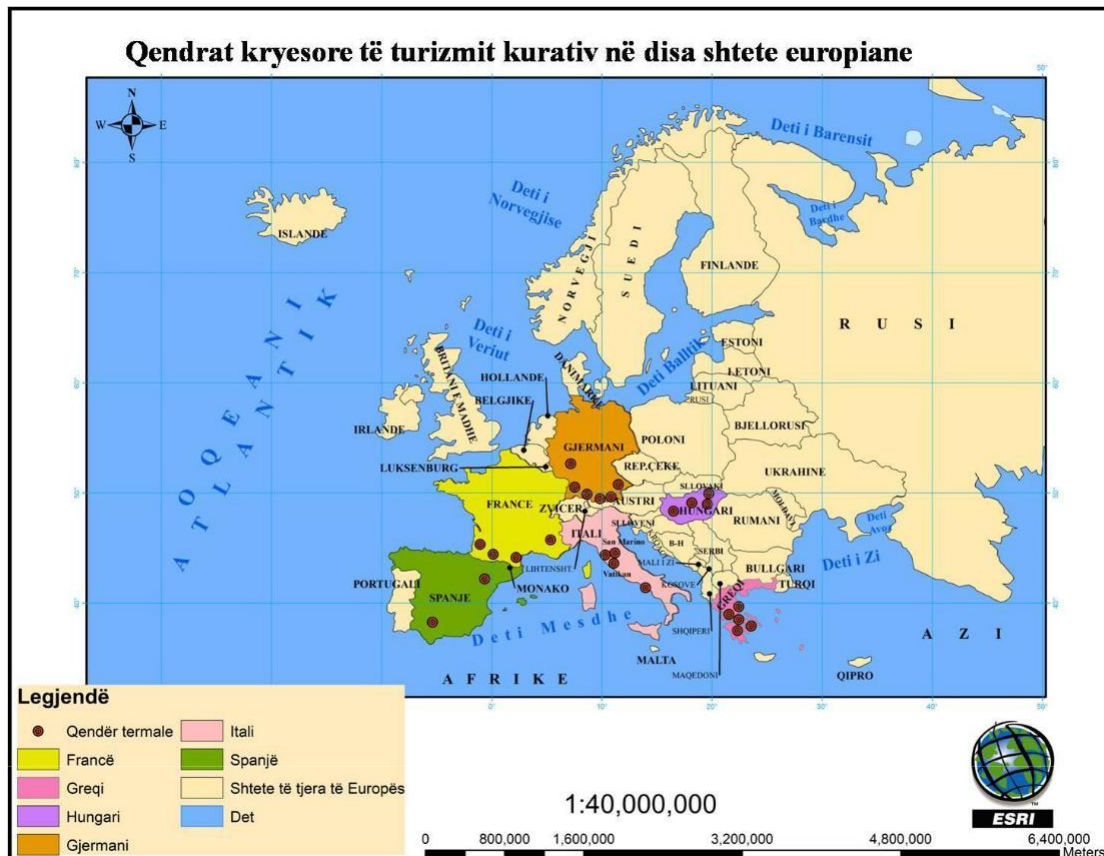
	is not relevant. The quality of the curative service is important.	the quality of accommodation and services provided
Spaces	Curative centers that offer cures thermal and hotels	Hotels and a few medical institutions/centers
Image and Marketing	It is viewed critically by the younger generations, considering them intended only for the elderly	Mainly, positive image
Benefits of natural therapies/treatments	Benefits from the use of natural remedies	Benefits from the use of natural remedies
Age of visitors	Mostly, 35 years and older	Mostly, 55 years and older

A recent study by the DOXA Institute found that 70% of the population wants to pay attention to health and psycho-physical well-being.

Another trend in developed European countries is the "excursionist" phenomenon. The phenomenon consists in the daily movement of visitors from neighboring countries (close to curative centers) to curative centers to close the full cycle of treatment. Excursionists make up 20-30% of the total number of visitors to the curative areas.

"Excursion" tourists are also considered those who visit the areas around the curative centers to get acquainted with various objects of art, history and cult. In these conditions, after visiting the

above-mentioned facilities, they make one-day visits or more to the curative centers near them. This phenomenon often occurs in European countries visited by American tourists.



Thermal and Medical Tourism in Italy and France

The case of Italy, and its proximity to the Albanian Market

The most popular destinations of therapeutic and thermal tourism in Europe are: Italy, Austria, France, Spain, Germany. Recently, countries from Eastern and Southeastern Europe have been added, such as Slovenia, Croatia, the Czech Republic with Karlovy Vary, etc. We should not leave without mentioning Bulgaria, Romania and Hungary which have recorded the best performances in this regard. Based on data provided by ESPA, the European tourist offer offers

1200 thermal and health sites. If the localities of Austria, Slovenia, Croatia and Poland are added, their number goes to 1500.

During the period 2007-2008, traditional curative and welfare tourism counted 18 million bookings, of which only half belonged to Austria. It is followed by Italy with 5.2 million overnight stays.

Research and studies at the European level are carried out for both traditional therapeutic and thermal tourism and "welfare".

Italy, favored by the presence of elements of "secondary volcanism", is undoubtedly one of the countries with the largest number of curative centers in the world.

In Italy the exploitation of mineral thermal springs was inherited by the Romans, who on Greek foundations managed to build and turn the body cure into a phenomenon of social life. The curative phenomenon is abandoned in the Middle Ages and reborn with the flourishing of Italian cities in the Enlightenment period.

In the years 1300-1400 the mineral waters of Fuji were exploited in Tuscany, the terms of Montecatini flourished, those in Emilia-Romagna, those of Parreta in Lazio, the baths of Viterbo, etc.

During the 1900s therapeutic and thermal tourism in Italy recognized its golden period. Its prosperity was favored by the unification of the country and the development of the railway network. This development led to the abolition of customs borders and increased influx of visitors. The most mentioned curative centers at this time were: Sanremo and Lido. In the following years the centers of therapeutic and thermal tourism were moved to the north of Italy, where the one of Montecatini stood out, once renamed "loisir" - a center of curative and pleasure.

Between the two world wars and after them, curative centers became more and more just places of therapeutic cures, while the aspect of well-being and pleasure passed into the background.

In Italy, "modern curative tourism" appeared only during the twentieth century. Today this tourism covers about 2% of the tourist phenomenon as a result of reimbursement of expenses by the national health service. Modern tourism was achieved with "traditional curative tourism". Its peak was recorded a century later than therapeutic and thermal tourism in England.

The success of therapeutic and thermal tourism in Italy is the result of:

- administration at the local level, which made investments in providing efficient structures;
- domestic and foreign investments;
- strong links with universities, in order to provide a high medical level of thermal cures;
- Investments in infrastructure and investments to make the stay of tourists in the curative centers more pleasant.

Recently, the changes that have involved therapeutic and thermal tourism (the inclusion of new elements, other than purely curative ones), have brought to justice the responsible actors that support this tourism. Thus the Italian Federation of Thermal and Curative Mineral Water Industry has promoted strategies to evaluate the new curative system. The steps in this strategy include: improving the image of the curative system, regaining the credibility of the population, strengthening the promotion of the concept of "thermal well-being", regaining confidence in the values of medical treatments and promoting the "newest" clientele tourism product.

Italy has always been cited as a leading country in the field of curative tourism. Its curative image is associated with important thermal centers such as those of Montecatini Terme, Salsomaggiore Terme, Ischia, Fiuggi and Terme Euganee.

Thermal and Medical Tourism in France

In the field of therapeutic and thermal tourism development France has been labeled as a "white book" on cures and well-being. Therapeutic and thermal tourism in 2008-2009 registered 492,331 visitors supported by the national health service. In the curative areas are registered about 8,805,571 days of stay and about 7,782,000 bookings. Of these registrations, 2/3 of them refer to the attendees in private structures.

As in other European countries, in France in recent years there has been a decrease in the number of visitors attending curative countries. Most of the curative centers (about 2/3 of them) are concentrated in its largest thermal regions: Aquitania, Linguadoca Roussillos, Rhone-Alpes and Midi Pyrenees. These regions are located in the south of France, while in the north such centers are missing.

In the most developed curative centers 73% of visitors undergo rheumatic treatments, 11% respiratory treatments, 6% digestive tract treatments, the rest urinary treatments.

The strategy that the organization of thermalism in France suggests in the context of the contemporary development of therapeutic and thermal tourism is the realization of a European network in order to exchange experiences. Based on this, the creation of a network was requested, which will not only enable the exchange of experiences, but will provide support from the respective governments and the EU itself. The final goal: the countries included in this network, why not our territories, would reach "Curative thermal Europe".

The German Experience

In Germany therapeutic and thermal tourism increased during 1998-2008. The number of visitors reached 6.6 million visitors favored by the high quality of services provided. Today therapeutic and thermal tourism is in the maturing stage.

As in other European countries, in Germany there are national bodies which link the development of therapeutic and thermal tourism with the protection, stabilization and rehabilitation of health supported by health insurance.

In Germany "curative tourism" is considered:

- Traditional therapeutic and thermal tourism (Kurtourismus)
- Wellness tourism (Wellnesstourismus).

Tourist destinations in Germany are numerous. The "Black Forest" area offers a large number of curative thermal cities such as: the famous Baderstrasse, Bad Liebenzell, Bad Teinach, Bad Wildbad, Bad Rotenfels, etc. Famous in Germany and Europe is the city "Baden Baden". Also mentioned is Aquisgrana with its hyperthermal waters and mineral springs. This is also called the "city of health". Not to mention Bad Homburg, Fussen, Bad Griesbach with their curative thermal waters.

Historically, the exploitation of mineral thermal waters in Germany began during the Roman occupation. The waters served for soldiers who found rest in the baths built by Roman engineers. Inherited from that time today, the term "Baden" is used. This term accompanies today the names of localities which have a curative thermal history on their shoulders.

Thermal and Medical Tourism based on the Hungarian Model

The development of therapeutic and thermal tourism is closely linked to Hungary's natural potentials. In the mountainous area, to its north, lies a large tectonic fault associated with the outflow of thermal mineral springs.

Hungary counts about 1000 hot mineral springs and uses hundreds of them. An important place for the use of mineral thermal springs is occupied by Budapest with 128 springs that supply 30 thermal baths in use. Sources for healing values are known from an early age. Over the centuries

they were abandoned to resume again in the late Middle Ages and during the Ottoman occupation. True curative centers were set up in the 17th and 19th centuries.

The use of thermal resources has strengthened in recent years. Today there are 125 curative centers in Hungary. Sites that possess thermal mineral springs are known in the local language as "suffisso". Besides Budapest, other thermal localities are those of Balaton fured, Eger, Heviz etc. For the use of resources and the development of therapeutic and thermal tourism Hungary is identified in Europe and beyond with Lake Heviz.

Lake Heviz and its curative properties

Lake Heviz in the county of Zalos in Hungary is located on a natural spring of thermal-karst origin. It has a diameter of 250 m and is supplied by several thermal mineral springs. The lake represents a precious treasure both from a natural point of view and from a world tourist point of view.

Characteristics of the lake: surface 4.4 ha, circular shape, flow 410 l / sec (35,000 m³). The temperature of the lake waters (supplied from thermal springs) is on average 22-36°C, volume 128,000 m³ and depth 2.8 m. It takes 36 days to change the water in the lake. Currently there are 7 thermal mineral springs near it.

Lake water used for therapeutic purposes, has a slightly alkaline chemical composition. Its therapeutic effect is due to the sulfur characteristics, fluoride concentration and high level of radioactivity which not only is not dangerous for the organism, but stimulates it. Its waters are used for the treatment of rheumatism, arthritis, spinal diseases, postoperative treatment and rehabilitation, gynecological, dermatological diseases, etc. The cures are also supported by good quality clay with curative values.

The name Lake Heviz means "thermal water". In the time of ancient Rome the therapeutic properties of its waters were known and only at the beginning of the XIX century the lake and

the surrounding spaces took on the nuances of a curative locality. Early water use is confirmed by archaeological data, which date the displacement and concentration of the population around it. Slavic and Germanic peoples settled here.

He would take physiognomy as a real curative center in 1795 and 1797, when the famous Festeties family built the first buildings. Renowned physician Schulhof established the research institute here and established on a scientific basis the therapeutic values of the lake waters and the springs that supplied it.

In 1952 the Ministry of Health set up the Heviz Health Hospital specializing in rheumatic diseases near the lake. Soon this lake became one of the largest centers for the treatment of rheumatic diseases. The tourist attraction of the lake is strengthened by the forest area that surrounds it. Forests, favored by the warm and humid air that enables the lake surface, purify the air by adding curative values to the area.



Mediterranean Thermal and Medical Tourism

The Case of Spain

Most of the thermal mineral resources in Spain are concentrated in the region of Andalusia. Since the times of the Arab caliphs they have been exploited for their curative properties. The Romans and later the Arabs enjoyed the therapeutic benefits offered by the thermal waters of this

region. Most thermal springs in Spain are located in areas designated as national parks and protected by UNESCO.

The thermal lake in the province of Zaragoza (Aragon) is also important in the development of therapeutic and thermal tourism in Spain. This lake ranks second in Europe in terms of size in terms of lakes with thermal mineral waters. The thermal springs that supply the lake have a constant temperature of 32 ° C. Attractive are the green areas that surround the lake with an area of about 68,000 m². In the winter season, from the contact of the warm water of the lake with the cold air, a thin surface of steam is created. It covers the entire lake creating a unique atmosphere for visitors.

In order to diversify and change the tourist offer, the Spanish government is making efforts to combine curative health services with tourist ones. About 430,000 people have benefited from curative services in Spain.

A recent study "Turismo de Salud" counts in the Iberian space 128 thermal stations, of which 86 with a downward trend. In recent years it has been sought to provide an image change in order to attract young people. The influx of foreign tourists in curative facilities is about 20 thousand visitors (1.4%).

Characteristics and Developments in Greece's Thermal and Medical Tourism.

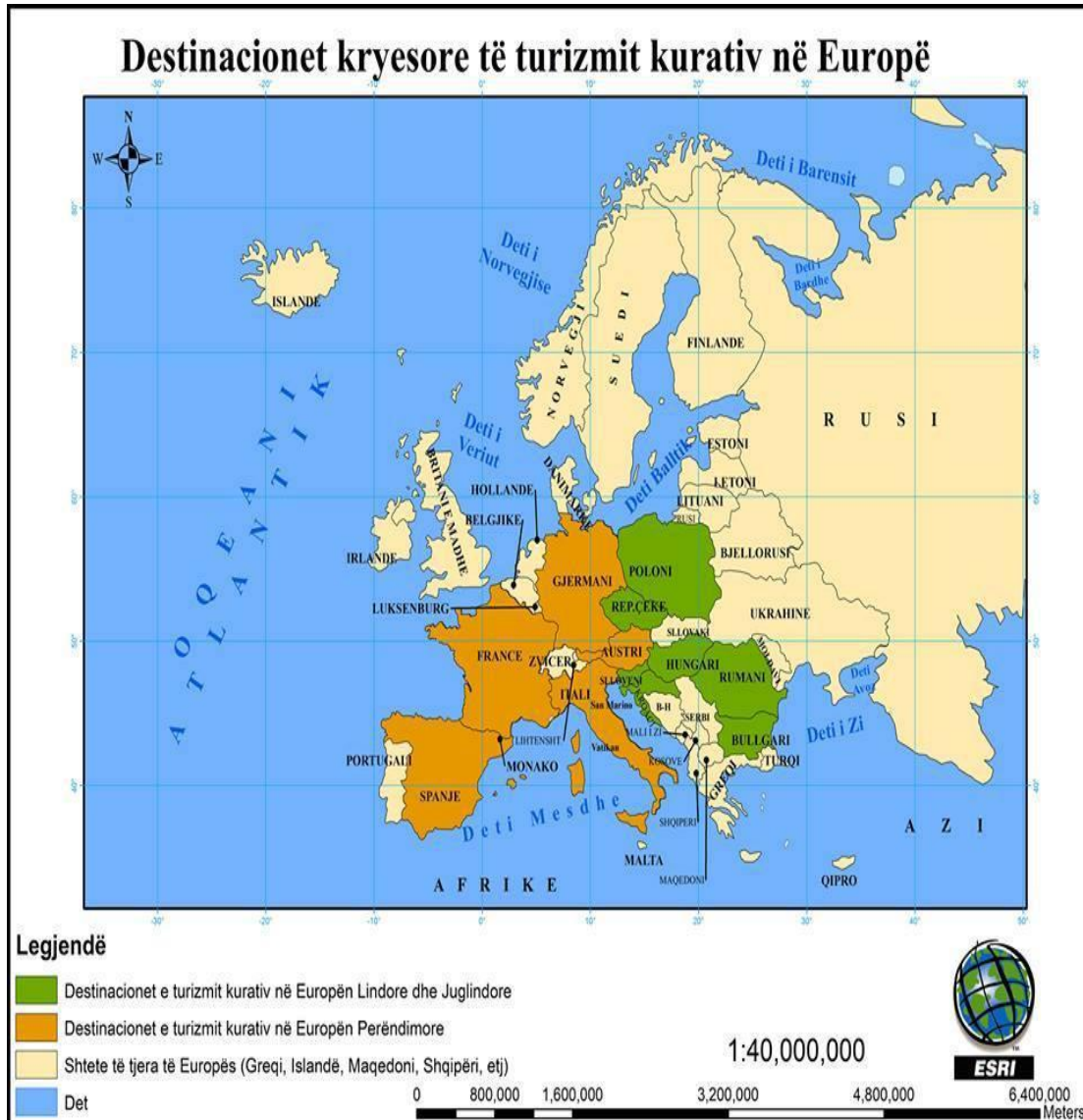
Greece, distinguished for its historical values, rich material and spiritual tradition, occupies an important place and for the considerable number of thermal mineral springs. Their geographical distribution as in Caiaphas, Kyllini and Lagada is related to tectonic phenomena. The springs of Methana, Milos, Lesvos, Samotracias and Limnos are related to volcanic activity. According to geographical and geological studies in the Greek territory there are about 752 (91.5%) thermal mineral springs against 822 natural water springs.

The therapeutic values of thermal mineral waters never faded over the centuries. Starting from the 5th century b.c. near the thermal springs began to rise "Asclepeia", sanctuary, dedicated to the demigod of the same name, where priests-therapists provided assistance to persons suffering from physical disorders.

The first public baths were built in ancient Mycenae. Herodotus was the first to systematically observe the benefits of these waters. He was able to describe them in detail and advise the use of hydrotherapy. Meanwhile Hypocrite managed to identify the pathologies for which the use of water was advisable.

The use of thermal springs in special structures appeared there from the beginning of the XIX century. In 1830 the governor of Ioannina, Kapodistrias, entrusted a group of physicians with the task of studying the mineral resources of the island of Kithnos. Among the oldest thermal stations we can mention that of Edipsos which Strabo and Plutarch described as a place where they merged into a single amusement and therapeutic treatments. The hot springs of Amaranto and Kalithea in Rhodes are also known. Not to mention Loutraki, which is considered the capital of thermalism in Greece?

Despite the values of mineral waters, in recent years there has been a progressive decline in curative tourism. This requires extensive information campaigns on the therapeutic values of mineral thermal waters. The misconception that these waters are only advised for therapeutic treatments for the elderly keeps the rest of the population away. This has deprived young people of treatments with these waters which not only cure but also relax. To re-evaluate the importance of the old curative structures and the reactivation of curative tourism, Greek investors have the task of designing special programs.



Development of Thermal and Medical Tourism in Albania

As in Europe and the Balkans, and in the Albanian territories, mineral thermal springs have been exploited from an early age. Their use for healing dates back to the time of the Roman conquest.

In the history of Albanian territories, the use of thermal mineral resources has passed in several periods, influenced by political, social and economic events. Information on their use is scarce, but information research and field monitoring have enabled us to classify the tourist movement and its evolution.

In-depth archaeological studies during the periods 1950-1986 have drawn important conclusions on the past history of the population in our territories. During these studies, information was obtained on the use of thermal waters and "baths" as ancient elements inherited from Rome. The dates which will be mentioned below, reflect their existence. They are considered as the first elements of the curative tourist movement in the Albanian territories.

Traditional therapeutic and thermal tourism (spa tourism) has clearly prevailed in our territories. Curative centers for the most part have a hospital image. There are few curative centers in which traditional therapeutic and thermal tourism is intertwined with that of well-being. Efforts to reorganize him are few.

Early Use of Thermal Waters in Albania

The earliest period coincides with the use of baths inherited from ancient Rome (late 1st century and early 2nd century). The second period coincides with the construction of baths in the III and IV centuries, which continue to be used until the 5th century.

With the spread of Christianity as a religion, thermal baths gradually lost their importance. By the end of the 5th century they no longer survived. Today it is difficult to determine their features, until the baths are not fully discovered. However, researchers determine that the baths in our area were built according to a well-known technique and in them the intention towards beauty is noticed.

The baths of road stations concentrated at the intersection of roads have been discovered. Among them are those of Bradashesh and Papri in Elbasan, Burizana in Kruja, Darzeza in Gramsh and Ndërshkalla in Kukës. All these baths are connected with the movement along the important roads of that time, such as the Egnatia, the road through the Osum valley and the one through the Drini valley.

The early use of resources for the treatment of diseases dates back to the Spas of Elbasan, Përmet, Peja, Kllokot, Dibra e Madhe, etc. They are confirmed by archaeological discoveries. Most of them regained their curative values during the Ottoman rule and later.

Bënjë of Përmet (Shqerri) has an early use. Despite historical developments and various rulers, the name of Bënjë has not changed. This relates to the strategic position of the thermal springs and the Kati bridge.

The use of thermal springs has continued at times with high intensity and at times lower. Field study, interviews with residents and spiritual material heritage have shown this exploitation. This is confirmed by the finding of some old toponyms in the Spas of Elbasan such as "source of scabies", "source of bones", "field of good cough", "stone of fate", etc.

Use of Thermal Waters Until 1945

For the later periods until 1945, a time when the history of the development of our territories is changing, the information on the use of thermal mineral resources is incomplete. For this period the data come from foreign travelers who have visited Albania.

During her trip to Albania and Albanian territories Edith Durham visited and then mentioned the healing effects of thermal waters. During the trip to Leskovik and Postenan she visited the sulfur spas that were located there. She wrote "... that the sick people of the area were crawling through the alleys leading to the spas.

Small "huts" were set up to enable the use of water. Internal gurgling could be heard in this building, while bubbling vapors could be seen outside. This spa was of great value in curing rheumatism.

In 1840 in his work "Espuise geologique de la Turquie d Europe" Ami Boue talks about the mineral mineral waters of Dibra and Fushë-Krujë (Ujëbardhë).

Around the 1930s, an important curative center for the time were the Spas of Elbasan. In the years 1924-1925 at the Institute of Technology and the Polytechnic in Prague were carried out the first analyzes of the water samples of the Spas of Elbasan.

Based on them, the relevant recommendations were given, emphasizing the use in rheumatic conditions. They developed during the reign of King Zog. He was able to bring in a specialist from Czechoslovakia, a country known for its use of thermal waters. The doctor brought to Elbasan made a very beneficial assessment, defining them as a cure for a variety of diseases. In a liter of water Dr. Beno Winter determined the composition with: 0.1228% sodium, 0.0137% potassium, 0.1016% calcium, 0.0642% magnesium, 0.0025% iron, 0.0044% sulfuric acid, 0.1675% sulfuric anhydride, 0.2251% chlorine and 0.50 KGL alkalinity.

At the end of the study were listed diseases, which can be cured by spa water. Today in some of the curative structures is kept the document that reflects the values of thermal mineral waters. Since 1932 these waters are certified and known for their curative values in Europe.

The spas of Elbasan attracted the attention of the citizens of Elbasan. Two important families in Elbasan, Nosët and Stringët, set up two recreational curative complexes with buildings, now known as Nosi Spas (Hotel Parku built in 1932 and Villa built in 1975).

According to the data of the Ministry of Finance at that time, the investment of the Nosi family for the construction of the hydrothermal bathing station "Park Nosi" was estimated at 175,000 gold francs. The operation of the seaport station began on May 28, 1932 after obtaining the

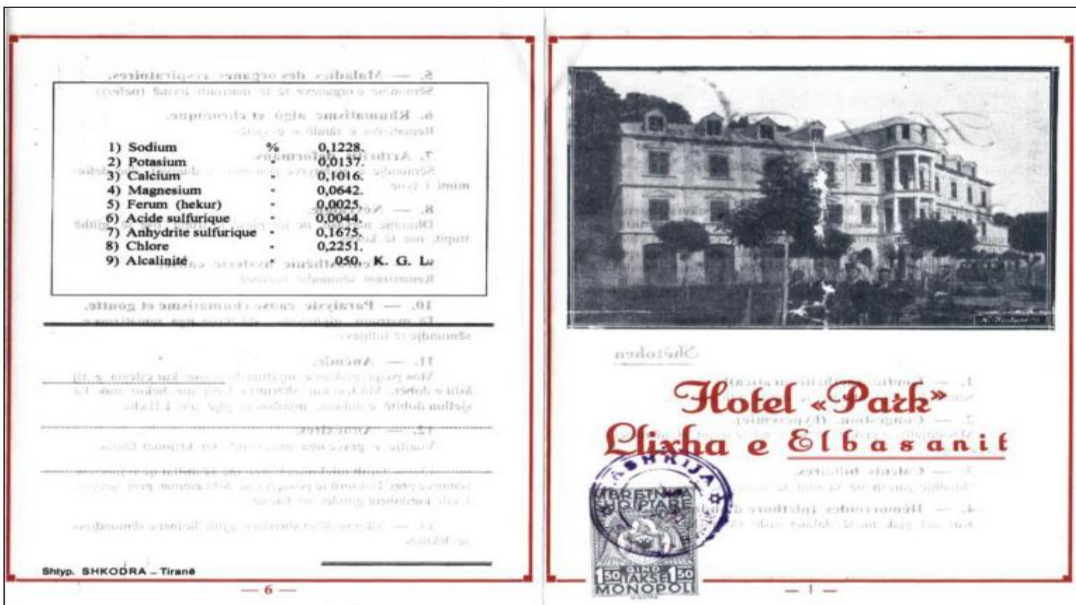
permit for the use of thermal water, which was given at the general meeting of the High Council of State by decision no. 232 dated 20.06.1932. This was then reflected annually in the Official Gazette starting from no.52 dated 23.07. 1932.

The hydrothermal waterfront station was surrounded by greenery, gardens, cafes and other recreational facilities.



Elbasan spas were also frequented by foreigners (expressing their importance in the Balkans and beyond). During a visit to Albania, the Minister of Turkey, Rushem Eshrem Bey, after being received by Veli Vasjari, then Deputy Mayor of Elbasan, was accompanied for a lunch in Llixhë. This expresses the values of the area not only for curative tourism, but also for visitors and recreation. While the N.M.S Queen Mother herself, accompanied by her suite, stayed a few days to bathe in the Spa. She was received by Veli Vasjari.

The following brochure (leaflet) is an indicator of the early use of the Spas of Elbasan and the importance of the curative values of these waters.



In addition to the Spas of Elbasan, those of Bënjë and Peshkopia are also known. The thermal mineral springs of Bënjë were frequented mainly by visitors coming from Gjirokastra, Tepelena, Përmeti, Janina, Konica and Merxhani.

Legends circulating throughout the area are associated with the exploitation and curative effects of resources. We mention the legend of the "priest's fountain" which strengthens the early use of water and their healing properties.

Early curative destination in Albania were the thermal mineral springs in Peshkopi and Dibër. Their use for curative effect is thought to have started as early as the 16th century. At the beginning of this century, two collective curative "baths" with stone stairs were built. Until 1927 there was no health institution in Debar or any other region. It was not about investments or

concentration of studies in mineral thermal areas. Despite these developments, mineral thermal waters were known and used to treat chronic rheumatism.

Controlled Tourism Developed Between the Years 1945-1990

With the establishment of the communist system, hydrothermal waterfront stations were nationalized. They were totally used for health purposes, turning into important treatment centers. The state began to use very low tariffs to meet the ever-increasing demands. The reception of visitors was subject to medical commissions in the districts. Spas began to resemble more and more hospitals, which continues today.

This period dates back to the construction of genuine tourist structures in Albania.

The movement of the population was controlled and the reception capacities of the structures were:

- Elbasan Spas with 380 beds: there were 3 state buildings Ylli 1, 2 and the building inherited from the Nosi family. Near the building inherited from this family was built a new one-story building called "Villa", which served only senior members of the party at the time.
- Peshkopia Spas with 160 beds. In 1952, 150 m away from the thermal springs was built a one-storey hotel with a capacity of 40 beds and 20 bathtubs for individual bathing. In 1974 a hotel with a capacity of 120 beds and its auxiliary annexes was built in the Dobrovo neighborhood of the city.
- Përmet e Përmetit with 15 rooms and 30 beds. In 1985 this building was engulfed in fire and today it no longer exists.
- 70 beds in Leskovik.

Thermal mineral springs in Bilaj. According to studies of that time these waters had several times higher radioactivity than other mineral waters. In addition to curative waters, clay was also used.

During the years 1945-1990 the curative values of thermal mineral springs were re-evaluated. Depending on the composition, the diseases they cured were specified.

Compared to previous periods, as a result of investments in the field of health, the number of visitors to the curative structures set up, increased.

Based on the average number of attendees in treatment places in Albanian areas before the 1990s, it is clear that the largest number of them is registered in curative centers in Albanian areas outside the borders of Albania. The largest number of visitors was registered in Banja e Pejës, in the 1980s.

The low influx of visitors in Albania is related to: policies pursued by the state, attendance closely related to the health service, insufficient capacity to receive visitors, etc. The largest number of visitors in Peja is explained by: the largest reception facilities, investments and the increase in the number of visitors from Serbia and other areas of the former Yugoslav Republic.

Bath Tourism Spur After 1990

The main motives that push visitors to curative centers are directly related to improving health.

After 1990, therapeutic and thermal tourism has been developed in accordance with the political, social and economic developments that include Albania and the Albanian territories. Compared to neighboring countries and beyond, the development of therapeutic and thermal tourism in our country is shown as follows:

Tabela 4: *Modern-day developments and opportunities in thermal and medical tourism*

Opportunities	Neighboring countries	Albania
Tourism offer	Hydrothermal sources and more	Only hydrothermal sources
Types of tourism	Therapeutic tourism and wellness	Traditional therapeutic tourism dominates the market
Age of visitors	No age limit	Mostly elderly visitors
Length of stay	Relative to age and interest	Usually stays of up to 12 days
Therapies	Traditional, as well as body care therapies	Traditional therapies and treatments

Integration with more recent tourism forms	Well-integrated with other forms of tourism, including recreational and seasonal	Lack of intertwining with recreational tourism, or other meaningful forms of tourism
Strategies and interventions	Focus on integrated tourism development through targeted strategies and policy-making	First stages of development at the local government level
Promotion of therapeutic tourism	Far-reaching promotion through the employment of a wide-range of tools	Lack of significant and targeted promotion of thermal and therapeutic tourism

The reception capacities in Albania reached 700 beds, while the number of visitors on average 2500-3000 per year. The following years were accompanied by an increase in reception capacity and the influx of visitors. This came as a result of the involvement of the private and family sector in tourism activities. According to MTKRS data for the period 2007-2008, the reception capacities reached:

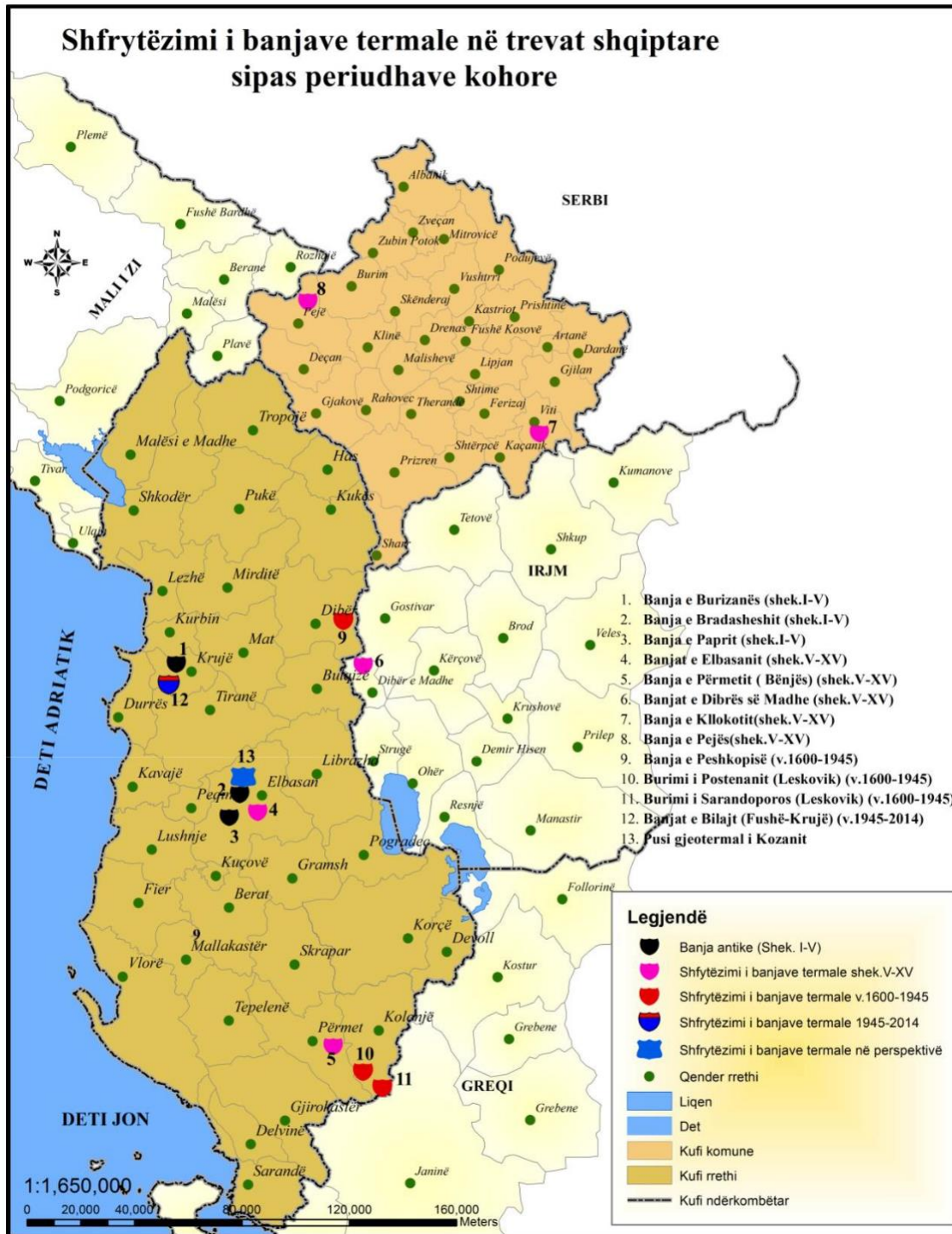
- Elbasan Spas: 14 accommodation units, 517 rooms and about 1034 beds;
- Peshkopi Spas: 2 accommodation units, 38 rooms and 78 beds.

It is thought that the reception capacity in these centers will be greater, if the entire private sector is involved.

The influx of visitors to these centers has increased in favor of free movement of the population, increased interest in improving health, increasing the number of curative reception structures, intensifying investments in this area, etc.

If in Elbasan the large number of visitors is closely related to the activity of private and family tourism entities, in Peja there is more public sector and less private sector. From the field monitoring it results that in Peja the decrease of the flow of visitors is related to the delays in the privatization of the curative center and the lack of investments.

The directions, forms and dimensions that therapeutic and thermal tourism has taken in Albania and the Albanian territories will be reflected in the other chapters with the respective specifics for each curative center.



Development Plan for the Bënjë Thermal Springs and the Surrounding Ecosystem

The Vjosa River Basin is the richest area with thermal mineral resources in the southern region. The sources of Bënjë, Postenan and Vromonero are distinguished here. Therapeutic and thermal tourism is most developed near the thermal mineral springs that emerge along the course of the Lengarica stream, a tributary of the Vjosa River.

The thermal mineral waters of Bënjë are located near the village of Bënjë in the commune of Petran in the district of Përmet. Petran commune has 15 villages. Most of them lie along the Vjosa River and its Lengarica tributary. Bënjë is bordered on the northeast by the villages: Ogren, Vinjah, Ogdunan and Grabovë, on the northwest by the villages of Lupckë and Novoselë and on the south by the Buarec stream.

The development of tourism in the municipal unit of Petran and in Bënjë is favored by natural and cultural potentials such as:

- thermal mineral springs;
- the Vjosa River and its tributary the Lengarica;
- cultural, material and spiritual heritage;
- tradition in the production of traditional products of the area of culinary.

The thermal mineral waters lie very close to the village of Bënjë at an altitude of 300 m above sea level. There are 6-8 sources. They are considered thermal mineral springs with a temperature of 25 ° C to 30 ° C and irreplaceable curative values. Among the most popular sources are:

- stomach, which originates on the upper leg of the Katie bridge;
- for curing skin acne (scabies);

- for rheumatic diseases (gout).

The outflow of the Bënjë springs together with those of Sarandopor are associated with deep tectonic faults in an active and continuous state. The researchers also explain the possible contacts of groundwater flows with Postenan thermomineral gases, which emerge at the base of a rock in the form of hot vapors.

The thermal mineral springs in Bënjë have been exploited since early times. This is confirmed by archeological discoveries in the cave of Bënjë. During the communist system, the first medical buildings were built. The controlled use of the waters of Bënjë started around 1964. The built structure had a specialized staff of doctors and provided services to the highest age groups of the population. The building was two-storey with a capacity of 15 rooms and 30 beds. The highway was paved and the ride was safe.

In 1985 this structure was engulfed in flames and the whole building burned down. No measures were taken by the then government to rebuild and put it back into operation. Accompanied by landslides involving the territory, today there is no trace of the previous building.

After the political, economic and social changes involving the country, the use of thermal resources was left to spontaneity. Bënjë thermal mineral springs are among the only ones in our country open in nature, far from the chaotic exploitation of the population and close to other natural beauties. Contemporary buildings or curative centers are missing. Their place is taken by temporary rock constructions, which create special areas where visitors, mainly from the surrounding areas, find the opportunity to be cured.



The number of visitors is higher in Bënjë, compared to other hydrothermal areas of southern Albania. Their number per year is about 10,000 (curative tourism, bathing, visitors and water sports), while only in the summer period in one day, the number of visitors goes to 250. The attendance of the thermal springs of Bënjë is far from the traditional attendance of the Spas of Elbasan.

Visitors are accommodated in hotels in the city of Përmet and in private apartments in the municipality of Petran. The reception capacities are: Ramizi hotel with 40 beds, Alvero with 35 beds and Përmeti hotel with 80 beds.

In the villages of Bënjë, Iliar and Badlonjë, residents offer accommodation in their apartments with a capacity of 15-20 rooms and 35 beds. Visitors, in addition to the use of thermal springs, get acquainted with the culture of the area and the rich culinary tradition. We mention jam, Përmet worries, wild cabbage pie, etc. In the tourist package, for visitors accommodated in the city of Përmet, there are visits to religious cult facilities (3 churches) and industrial facilities for the production of wine, brandy and glucose.

Tourist excursions

Therapeutic and thermal tourism in this area is closely related to visiting tourism, exploration, water sports, cultural and historical, etc. The natural wealth is intertwined with the cultural and historical one of the area, favoring the phenomenon of the "excursionist".

Part of the main motive of the visitors is the knowledge of the cultural values of the area as well as the practice of water sports. Annually, according to information from tour operators, their number goes to 7000 visitors. They, after practicing water sports in the canyons of Vjosa and Lengarica, relax in the thermal baths of Bënjë. Foreign visitors are of young ages, lovers of sports and nature. They come from Germany, Spain and France. There is no lack of American, Danish and English tourists.

There are many local visitors who frequent the spas, as they have visited their relatives or other cultural and historical sites. Important historical and religious objects are the churches among which the one of Bënjë with important values for the area is distinguished. The village of Bënjë is also attractive for the way the houses are built with stone and wood.

Attractive nature, thermal springs, Lengarica valley intertwine beautifully with the Katiu bridge. The bridge was built by Ali Pasha Tepelena and has stood the test of time.

Field monitoring and visitor surveys identified the following specifics in the use of Bënjë thermal mineral resources:

- satisfactory level for the curative values of thermal waters;
- positive assessments of road infrastructure;
- positive evaluations of the level of hygiene, accommodation and food provided;
- good opportunities to spend free time;

- satisfactory level for the hospitality of the local population.

SWOT Analysis for the Development of Therapeutic Tourism in Bënjë

Strengths	Weaknesses
Significant natural potential	Shfrytëzim i pjesshëm i ofertës turistike
Large number of domestic and foreign visitors	Lack of investment in curative infrastructure for the establishment of a center of rest, relaxation and treatment
Diversified tourism offer	Lack of medical staff and equipment
Hospitality and tradition	Little promotion of curative tourist values
High quality of traditional local products	Delay in privatization and issuance of permits for the development of trade and other services
Integration of therapeutic and thermal tourism with elements of recreational, cultural, religious, sports, etc.	Improper use of mineral thermal springs away from doctor's advice

Dominance of visitors of different ages, with dominance of young ages	Pollution of thermal mineral springs by large number of visitors
Investments in road infrastructure	Threat of resources from interventions for the construction of HPPs
Opportunities	Threats
Increase in the number of visitors from other Albanian territories	Lack of a proper recreational-curative center. Lack of medical staff
Good traditions in the use of thermal springs	Remains only in the theory of development plans
Support provided by central and local government	Spontaneous and unorganized use of thermal mineral resources
Increased interest of foreign visitors to get to know this area	Lack of vocational school in the field of hotel-tourism in the city of Përmet and surrounding areas

Combining tourist offer (natural and cultural potentials)	Construction of HPPs on the Lengarica River.
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Development Plan for the Leskovik Thermal Springs and the Surrounding Ecosystem

In the south of Albania, therapeutic and thermal tourism is also developed in Leskovik. Thermal mineral springs are located 10-12 km south of the town of Leskovik. They are thermal springs rich in salts, which treat several types of diseases. Water temperature ranges from 29 ° C to 40 ° C.

Thermal springs are located near the village of Kuqesh in the municipality of Leskovik, in the district of Kolonja, on the banks of the river Sarandoporo, a tributary of the Vjosa, 430 m above sea level and 4 km from the customs point of Tri Urave.

Thermal springs have scientific (geological, hydrological), medical, aesthetic, tourist and economic values. They visit according to the itinerary the town of Leskovik-the village of Kuqesh (near the state border with Greece).

Prior to the 1990s a 50-bed hydrothermal power station was set up here. The 100-bed Spa Hospital went out of business during the 1997 riots to be rebuilt and resumed later.

The curative qualities of these waters are known to cure many diseases ranging from those of the skin to those of the internal organs (stomach, kidneys, gallbladder, etc.). According to official data, in these facilities, attendance has reached over 1200 patients per year.



In this area, as in Bënjë, spa tourism is supported by the natural beauties of the area and the cultural potentials that Leskovik and its surroundings offer.

Based on the above analysis, we emphasize that therapeutic and thermal tourism in Albania is presented with specific developments for each area that enables it. Despite the waters with known curative properties, tourism is underdeveloped. Curative structures have the appearance of "hospital centers", elderly visitors, existing unconstructed curative structures and low promotion. Features and analysis of the development of therapeutic and thermal tourism for each curative center is evidenced through swot analysis.

The services provided are average. In addition to these developments, efforts are being made to reconstruct the former curative centers and set up new structures. Today's challenge of many of them is the provision of a quality service and the possibility of contemporary development of curative tourism.

Analysis of the Problems Facing Therapeutic and Thermal Tourism

Development in the Bënjë and Leksovik Area

Field monitoring and analysis of tourism developments identified the following problems related to the development of therapeutic and thermal tourism throughout the Albanian territories:

- Lack/insufficiency and inadequacy of infrastructure.

- Stressful seasonality, due to lack of suitable facilities. Therapeutic and thermal tourism does not take place throughout the year. The influx of visitors has a course that runs from April to October. Due to the lack of adequate infrastructure at other times of the year, this tourism develops little or not at all.
- Lack of cooperation between entities that practice this type of tourism.
- Inequality is recorded between curative areas. The "Albanian curative product" is missing. In the Albanian territories there are some active curative centers and others not well used. Newcomers to curative areas are mostly from the spaces around them. This is associated with low levels of spending and weak links between areas.
- Limited opportunities for significant investments in this sector. The interior areas of curative spaces have a low economic level, reducing the possibility of investment by the community.
- Limitations on financial resources. Curative activities are low profit by not providing financial opportunities for new investments.
- Low level of professionalism. There is a lack of interest on the part of businesses to invest in improving the services provided. There is a lack of investment for the professional improvement of doctors. The interest of the community to educate children in vocational education related to hotel and tourism is low.
- Lack of additional services. The territories of the municipalities where the curative assets are concentrated, have a limited offer of services, which do not properly reflect the tourist potentials of the areas.
- Weak connections with areas where other types of tourism develop (natural, cultural, etc.). Some of the curative centers are located nearby or are part of "protected areas".

Collaborations are missing. Integrated tourism offer policies that curative areas offer are not programmed.

- Dominance of a group of visitors, with limited tourist interests. Curative structures expect a "certain group of visitors" who attend them only to cure one or more pathologies. In this regard the image of curative areas appears weak and uninteresting.
- Lack of specific policies for the protection of curative sites. Curative areas show problems in their protection from natural and human phenomena (floods, urban pollution, landslides, etc.). No domestic defense policies intertwined with national and regional policies are envisaged.
- Lack of integration of Wellness systems in curative treatments. Today wellness appears more attractive to both investors and the younger clientele. It is important to integrate it in the tourist offers of curative areas.
- Chaotic constructions in the territory of thermal springs. In most of the curative areas, the tourist constructions are unstudied and contrary to the urban development.
- Indiscriminate use of mineral thermal resources. In some of the curative areas, the community and the population of the area have indiscriminately exploited the thermal springs, using plastic pipes. This use has tarnished the image of tourist areas and has brought pollution of land, air, etc.
- Weak links between therapeutic and thermal tourism and other sectors of the economy.
- Integration of curative development policies with other regional systems (sectors). Today, integration policies between the sectors involved in the overall development of curative areas are still underdeveloped.

Analysis of the Potential for Therapeutic and Thermal Tourism Development in the Bënjë and Leksovik Area

In addition to the mentioned problems, therapeutic and thermal tourism in the Albanian territories is supported by:

- Significant natural resources. Curative sites represent areas with significant natural potential. Curative values are intertwined with natural potentials enabling the integration and realization of comprehensive activities for visitors.
- Good opportunities to reach curative areas. Almost all of these areas are easy to reach, as they are located close to national roads.
- High therapeutic quality of mineral thermal waters. Thermal springs have special chemical properties, which enable the cure of various pathologies.
- Areas of special historical and cultural interest. The curative places in the Albanian territories have close connections with special historical and cultural elements of the region that they represent.
- Cooperation between curative areas in the initial stages.
- Increasing the number of visitors. In addition to the visitors who frequent them according to the seasons, there is an increase in the number of daily visitors who are attracted not only by the curative values, but also by the traditional holidays.
- Institutional interest. Institutional efforts have been stepped up to regulate tourism developments in areas where mineral thermal springs are concentrated, mainly at the local level.
- Significant investments for the recovery of tourist activity.

- A high level of tourist health services comparable to the Balkan and European ones.
- Combining therapeutic and thermal tourism with other types of tourist movement such as visiting, recreational, cultural, historical, etc.

SWOT Analysis for the Common Development Area

Strengths	Weaknesses
Therapeutic tourism based on diverse potentials.	Lack of investment for the development of therapeutic and thermal tourism in countries with opportunities for this activity.
Therapeutic tourism based on the values of the curative properties of thermal mineral springs.	Hotel structure to be rebuilt according to contemporary standards.
Therapeutic tourism, as the most important branch of the economy for some curative areas.	Low interest in integrating curative potentials with cultural ones in order to diversify tourism activities in curative places.
Increasing the number of domestic and foreign visitors.	Lack of structures that enable other recreational and entertainment activities.
Opportunities for the development of therapeutic tourism, supported by other sectors of the economy.	Strong competition with curative structures in neighboring countries and beyond.
Curative structures equipped with modern apparatus and trained staff.	Lack of state strategies for the development of curative tourism.
Increase institutional efforts at the local level for the sustainable development of curative tourism.	Indiscriminate use of resources, leading to pollution and damage to the image of curative places.
Opportunities	Threats
Progressive aging of the population and	The world economic crisis due to COVID-19

increasing interest in psycho-physical well-being will be accompanied by the combination of traditional therapeutic and thermal tourism with that of well-being.	that has included the Albanian territories; as well as the presence of curative centers in the Balkans with lower prices and better conditions.
Traditions in the exploitation of hydrothermal resources and the development of curative tourism.	Increased competition in the market for curative offers in Albanian territories.
Increased interest of foreign visitors in combining well-being with nature, culture and cuisine during their stay in Albanian curative centers.	Exclusion of strategic interventions in future tourism policies.
Areas still unexploited (e.g., Sarandaporo near Vronomero), with prospects for the development of curative tourism.	Forgetting curative spaces, delay in privatization of curative centers, lack of significant investments, etc.

In perspective, for the Albanian territory is foreseen the reduction of the number of the elderly visitors. This will be accompanied by a decrease in interest in traditional curative treatments. The new generations will replace and adapt to the new trends of the time, combining elements of traditional therapeutic and thermal tourism with that of wellness.

Therapeutic Tourism Product and Brand Marketing Nationally and Internationally

Therapeutic and thermal tourism from the national and international point of view exhibits the following characteristics:

National perspective

In the Republic of Albania there are changes such as:

- tourism product based on important natural and cultural resources;
- curative activities intertwined with other activities;
- predominant “traditional curative” tourism focused on the following elements:
 - traditional therapeutic cures;
 - different length of stay depending on the pathological treatments, their complete cycle, hydrotherapy, balneotherapy, etc .;
 - the main purpose is to cure pathologies and, rarely, to spend free time;
 - baths in bathtubs and swimming pools;
 - individuals and couples over the age of 60;
 - accommodation in private hotels and family structures;
 - seasonal tourism;
 - close links with the culture and culinary features of curative areas.

International perspective

- increasing the quality of life for the fourth age;
- the transition from the "passive" to the "active" concept of health, ie from "cure" to "prevention";

- fading coverage of thermal cures by the state and health insurance;
- evolution in curative treatments;
- increasing competition between European and Balkan countries in the field of curative tourism.

Integration of Therapeutic Tourism into the Sustainable Development Strategy

There is a close link between tourism and the environment. Tourism development is associated with negative and positive effects on the environment. Negative effects generally prevail leading to damage to the ecosystem and disruption of biological chains. In some cases the damage is such that the chances of recovery are slim. Damages are numerous and include: water and soil pollution, acoustic pollution, deforestation, damage to natural objects of rare value, etc.

In the case of the development of curative spa tourism the impact is direct on the environment. The thermal mineral springs that favor this type of tourist movement, are unique environmental values.

The environment and landscape of spas and baths in our area is attractive and interesting. This landscape provides good opportunities for the development of tourism not only curative, but also recreational, visiting, recreational. Landscape with suitable hilly reliefs, valleys, forests, flora and fauna, rich material and spiritual traditions of the population are the bases and premises for the development of tourism.

The efforts of local governments, private businesses and curative centers aim at intervening in the environment, in order to develop curative tourism. Interventions have been associated with damage and pollution. We would group pollution and environmental problems into that of the aquatic environment (thermal springs) and the terrestrial one.

Aquatic Environment (Thermal Resources)

The thermal springs in most of the Albanian territories are used by private businesses. Exploitation is often uncontrolled leading to damage and pollution of thermal waters. Sulfur spreads easily in the air, causing concerns to both the local and visiting population (Përmet, Kolonjë, Gjirokastrë, etc.).

In some areas, the intake of thermal water directly from the source is recorded. Water is transported to bathtubs in private homes. This has led to resource damage, pollution and the impossibility of a more rational use in the future. To get water from springs, families use plastic pipes. In this regard, the image of curative centers is dim and unattractive to visitors.

Mineral thermal waters are everyone's property and should not be left to spontaneous exploitation. The law governing the leasing of thermal water does not apply. If this law were to work, the profits obtained from this exploitation would be invested in the quality of tourist services, infrastructure and to significantly improve the tourist service to the client.

Environmental pollution comes as a result of the discharge of used thermal water. The question often arises: What happens to thermal waters after they have been put to use? Where do they flow?

In the studies conducted for many curative areas, there have been proposals such as: injection of thermal water used back into the ground. The high cost of investment does not afford to support such proposals. Used water flows into conventional sewerage systems and is associated with negative effects on agricultural lands near them (Përmet, Kolonjë, Gjirokastrë, etc.).

Terrestrial Environment

In the terrestrial environment the most problems appear in the area where the thermal waters are used. Environmental problems are related to illegal construction. They are generally erected near thermal springs.

Numerous illegal constructions have damaged springs, territory and green areas. They are unstudied and inconsistent with the urban development of areas or municipalities. Urban waste is also problematic. They significantly damage the image of curative centers. The monitoring showed that waste is caused by: rural market in some municipalities, lack of landfills, etc. In this regard, more efficient organization is required for garbage collection or landfilling, avoiding the visual and environmental impact.

Based on the opinions of specialists, we emphasize that environmental pollution, urban waste near baths, uncontrolled natural water flows are the most worrying problems for the tourist image of curative areas and a danger to the residents themselves. The situation will improve if the development plans drafted by the respective municipalities are implemented.

Therapeutic Tourism as an Enabler of Sustainable Development

Therapeutic and thermal tourism is one of the activities with a direct impact on the sustainable development of spa areas. It provides a good portion of the local annual income and plays a vital role in community employment. The connection that therapeutic and thermal tourism has with the environment and society is important for sustainable development.

In order to ensure sustainable development, in the areas where therapeutic and thermal tourism takes place, a balance and cooperation between the community, the environment and the visitors must be enabled. The sustainable development strategy has three objectives:

- economic development;
- equality and social cohesion;
- environmental protection.

In terms of the development of therapeutic and thermal tourism for spa areas, the implementation of the sustainable development strategy ensures:

- Economic development: development of other branches of the economy in the service of visitors, community employment, income growth.
- Equality and social cohesion: increase the standard of living of the community, increase its participation in the planning and management of thermal mineral resources and the development of spa tourism.
- Environmental protection: minimization of pollution, reduction of environmental degradation, mitigation of unstudied constructions near thermal mineral springs, protection of cultural and natural heritage of areas.

Durability is closely related to quality. Commitment to the quality of the environment, society and economic development increases the quality of tourism services. In terms of the principle of sustainability, "integration" has a special place. Therapeutic and thermal tourism must be well integrated with all types of activities that have an impact on the environment and society. In this chapter, attention will be paid to therapeutic and thermal tourism in the context of integrated tourism development.

Today's challenges in sustainable development for curative areas are related to: mitigating the seasonality of spa tourism, improving the quality of tourist services, increasing the standard of living of the community, minimizing the indiscriminate use of mineral thermal resources, reducing the level of environmental pollution and protection of cultural and natural heritage.

Integration of Therapeutic Tourism into the Albanian Social and Economic Development Strategy

The development of tourism in general and curative in particular is supported by strategic interventions. After the political, economic and social changes that included Albania after 1990,

several strategies have been written and drafted for tourism and its development. Its strategic development is part of the economic and social development of Albania.

Some data on tourism:

- in 2017 about 4 million visitors;
- in 2018 about 5 million visitors;
- in 2019 about 6 million visitors.

During these years, the Ministry of Tourism and Environment does not provide us with specific data on the number of visitors to curative areas.

According to researchers in this field, the growing figures mentioned above are more related to the growing interest of foreigners to discover Albania, than to the clear objectives of tourism development strategies in Albania.

How is the development of tourism in general and curative in particular presented in the focus of the designed strategies?

Strategic developments 1993-2010

After the changes of 1990, the Ministry of Tourism, supported by the European Bank for Reconstruction and Development, drafted the first tourism development strategy in Albania. This strategy did not meet the set expectations and brought shortcomings. The shortcomings were also reflected in the developments of curative tourism. It was left in oblivion more than any other type of tourism. Therapeutic and thermal tourism was not only not clearly included in the vision of this strategy, but no investment and marketing plan was drafted for its development. In the areas where mineral thermal springs were exploited, the old vision as a hospital center far from contemporary developments prevailed.

In addition to the shortcomings as a result of supporting investments by law, market opening, familiarity with tourism potentials increased foreign and domestic investments in the field of therapeutic and thermal tourism developments.

Strategic Developments 2002-2010

The new strategy for this period will be drafted by the Ministry of Tourism with the support of the company "GTZ-ghh Wiesbaden". The focus of this strategy would be the development of "sun and beach" tourism, special interest, business and conferences. In this strategy the preconditions of development were introduced, seeing that these elements had not been implemented before. Some of the preconditions were closely related to the development of curative tourism. In the opinion of scholars, especially foreign ones, some of the preconditions were not met.

Tourism in general and curative in particular were not supported by the promotion. There was no coordination between promotion on the one hand and investments to preserve and promote tourism potentials on the other. Foreign visitors came to see the mineral springs with curative values known in the Balkans, but the lack of investment led to a decrease in their number in subsequent periods.

Sectoral tourism strategy with a focus on cultural and environmental tourism To reactivate the 2002 strategy, the Ministry of Tourism drafted a sectoral tourism strategy, focusing on cultural tourism. The development of sustainable tourism would be achieved by ensuring repeated visits to cultural and natural destinations. This strategy had its shortcomings, as it was not prepared on the basis of extensive consultations, far from market analysis and objectives. It turns out that to a large extent this plan was not implemented. Institutional infrastructure did not work and today it is a stalemate for tourism development. In this strategy therapeutic and thermal tourism occupied a small place.

Tourism is an important part of economic and social development. Where tourism flourishes, economic growth, employment growth, income growth, domestic and foreign investment growth are recorded. Tourism in general and curative in particular are part of the development plans and economic and social development strategies of many areas, which we will address below.

Therapeutic Tourism and Thermal Baths in the Sectoral Tourism Strategy of Albania in the Past Decade

Tourism development was supported by the Tourism Development Strategy. This strategy (1993-2010) foresaw the development of tourism in three phases. In the first phase, the creation of a clear image on tourism in Albania was envisaged. The second phase envisaged significant tourism investments, while the final one would be finalized with the success of the first two phases. From the analysis of the progress of this strategy, the relevant Ministry (despite government changes) has compiled the Tourism Sector Strategy for the period 2007-2013 and 2014-2020, reflecting the non-fulfillment of some of the main preconditions. Some of the preconditions for therapeutic and thermal tourism are not met:

- Implement sustainable development from all levels of planning, decision making, management in the public, central, local and private sectors. Many curative areas lack support for sustainable development.
- Completing the legal framework in tourism. The legal framework for therapeutic and thermal tourism is very weak. He is almost absent.
- Infrastructure development. This is one of the preconditions for the development of tourism still unrealized.

Rich in numerous mineral thermal springs, a tradition from antiquity, therapeutic and thermal tourism is offered to local and foreign visitors as one of the most special types of tourism.

Therapeutic and thermal tourism is intertwined with recreational values, material and spiritual tradition and new elements such as "wellness".

However, limited infrastructure is a major problem for the rapid development of tourism in most regions in Albania. For certain curative areas the immediate management of pollution is required, namely urban pollution and the indiscriminate use of plastic pipes. Intervention is necessary to ensure tourist attraction and sustainable development.

Infrastructural and Accommodation Challenges

- The ownership precondition still remains unfulfilled. The development of therapeutic and thermal tourism requires clarification as soon as possible of legal ownership and use of thermal mineral waters. From this point of view, work should be done on reducing and managing illegal constructions in curative areas.
- Telecommunications and the Internet.
- Review and set standards for drafting land use plans, especially in areas with therapeutic and thermal tourism potential.
- Increase funding. For therapeutic and thermal tourism this will support the maintenance of thermal mineral resources, their management, human resource development and improving the image of curative centers.
- Data collection and processing system. For therapeutic and thermal tourism this is one of the immediate needs, as it would enable the organization and collection of data according to international standards. The lack of coordination of data remains problematic for our country, as they are obtained from many sources and directions.

Potential Trajectories to the Sustainable Development of the Therapeutic Tourism Market in Albania

To ensure the therapeutic and thermal tourism product, starting from the Tourism Development Strategies in Albania, we identify:

The Objective

- Albania rich in thermal mineral resources, combined with other natural elements that provide recreation, is an attractive destination for local, ethnic and foreign visitors.

The Potential:

- mineral thermal springs known for their curative values since antiquity;
- rich, old tradition in their exploitation;
- curative areas associated with other natural resources;
- curative areas related to spiritual material heritage.

The Threats

- illegal constructions, curative structures that do not satisfy the interest of visitors;
- environmental problems, urban pollution, use of plastic pipes, road infrastructure without standards;
- uncertainty over ownership, indiscriminate use of mineral thermal waters by the population, etc.
-

The Products of Therapeutic Tourism

- Central Albania: thermal mineral springs of Tregan, Hidraj, Kozan, Bilaj;
- Southern Albania: the mineral thermal waters of Bënjë and Leskovik;
- Northeastern Albania: Peshkopi Spas.

The regional context

As defined by the project, the focus of tourism development is put on two designated municipalities being: Përmet (at the Bënjë locality) and Kolonjë (at the Vronomero-Sarandaporo locality). The aforementioned localities are located in South Albania. Overall, South Albania, defined that way, offers a unique blend of Ionian coastline and hinterland, appealing nature, three UNESCO heritage sites, rich culture and history as well as authentic rural experiences and gastronomy. As an emerging tourist destination, South Albania has still many bottlenecks to improve in order to professionally develop tourism.

It is dominantly a rural area, historically oriented towards primary economic sector, which is still very strong. Nonetheless, some bigger cities and more developed areas started changing their economic orientation towards services. South Albania has a relatively young population, but there is an above average unemployment rate recorded and strong migration process, with people emigrating from rural areas to cities and emigrating abroad, mostly to Greece. Socio-economic situation puts additional challenge of finding available workforce with suitable professional qualification.

Conducting accurate market analysis on regional or destination level is limited due to the fact that reliable data on basic tourism-related statistics just partially exists on national level, while on regional and destination level, there is a complete lack of any official tourism-related statistics.

Thereby, in order to establish current status quo of tourism, consultancy team conducted primary and secondary research as well estimated some data based on a set of assumptions.

At the moment, accommodation sector in South Albania is characterized by a limited choice of accommodation types and dominated by small, midscale accommodation properties, majority of them being family-run hotels and private accommodation establishments. In four designated municipalities there is an approximate number of 16,366 beds in all registered and non-registered accommodation types (84% in Saranda, 7% in Berat, 7% in Gjirokastra and 2% in Përmetmunicipality). While hotel beds account for an average of 75-90% of total accommodation supply in hinterland, in Saranda the accommodation supply in terms of beds is equally distributed between hotels and private accommodation (apartments, rooms for rent, guests houses, etc.).

To analyse tourism demand, consultancy team estimated arrivals and overnights based on data regarding occupancy rates and average length of stay gathered through interviews. Thereby, a total of 681,044 arrivals and 1,803,524 overnights (81% Saranda, 9% Berat, 8% Gjirokastra and 2% Permet) were estimated for year 2017, with a low average length of stay in hinterland of 1.5 nights and 3.2 nights on the coast. There is a notable seasonality pattern in all destinations. Hinterland achieves most of the tourism volume from April to end of October with peak during July and August, and coast in summer period from June to September.

In South Albania foreign guests account for around 70% of total arrivals. Main source markets are Northern and Western Europe as well as USA, with additionally strong Eastern European market in Saranda.

Unlike Saranda, that records high share of families and younger couples, rest of municipalities record higher share of second and third age guests that travel mostly as couples or group of friends.

Dominantly, guests come to South Albania as part of organized touring groups visiting Albania (South and North) or Balkans. They are mostly motivated by history, culture and heritage. But, there are also organized small active and adventure groups engaging in hiking, cycling and horseback riding. In Saranda there is a higher share of individual guests coming for family summer holidays.

Tourism value chain in South of Albania is below average with high potential for further development. Being an emerging destination, South Albania has low exposure towards foreign markets. Thereby, tourists face serious impediments while planning their trip, mostly in terms of image and awareness, available information about destinations, service information, reliable recommendations and inspirational content related to destinations. This is seriously influencing tourism volume and average length of stay.

Another issue of South Albanian tourism offer is accessibility of destinations and points of interest. Albania has poor air connectivity with a broader region, and with only one airport in Tirana, all destinations are accessible only by road that is generally in poor condition, or ferries, if a coastal destination. But, even though Saranda is just half an hour from Corfu airport, it can't leverage on this proximity due to low number of ferry and speedboats which frequencies are below market needs.

Tourism development is strongly limited due to complete lack of management system which would give a frame for product development and marketing and would establish a line of communication and cooperation from national to local level. Current local entities managing tourism are administrative tourism bodies with virtually no budget for product development and marketing. Moreover, staff employed there is unskilled, under productive, insufficient in number of specialists that lack basic standard operating procedures (from budgeting to implementation).

In addition to that, there is a weak stakeholder structure in South Albania, with no strong private players that would have knowledge or money to lead a change in process. Public sector, on the

other hand, lacks credibility of potential to develop destinations, implement initiatives and spend money adequately, thereby a productive cooperation among public sector and private stakeholders is on a very low level. Private sector has started developing its own tourism offer regardless the lack of public sector leadership, while public sector is still more focused on administrative work, letting tourism happen.

Poor tourism infrastructure is strongest limiting factor for attractive experiences creation and attraction of more individual guests. Even though the resource base is highly competitive, South Albania lacks basic elements on sites and interpretation, which positions the whole offer below international standards. Currently, South Albania is strongly focused on one tourism product, mass market sun and beach, neglecting the professional development of culture and nature-based activities. But, because of the resource appeal, foreign outbound agencies and tour operators' interest for South Albania is increasing.

Gastronomy offer is based on traditional products and as such is a valuable resource that has positive effect on overall tourism offer. However, most of the F&B facilities need to increase their overall service quality and appearance. Moreover, general awareness of local cuisine and products needs to be improved, as well as presentation of dishes and distribution system of local products.

Increasingly, tourism in South Albania is becoming of interest for different donor and financial institutions (GiZ, Risi Albania, World Bank, EBRD, AADF, etc.) that focus on product development, marketing, DMO and branding, but with no coordination. Private stakeholders show to be fed up with different initiatives not showing results or change.

In terms of marketing and branding, there are several branding initiatives for South Albania, but none of them being implemented, while on the municipal level, only Berat has a logo which still has not been fully implemented. Brand awareness of the whole South Albania as well as its destinations is very low or hardly existing. Available printed materials in South Albania are

mostly created and managed through different private and NGO initiatives, lacking quality content, suggested itineraries, professional photos and visual appeal. Online presence and visibility of South Albania is still at its beginnings with tourism websites and social media channels in a development stage, with a strong need to be improved and professionally managed.

As a sum-up of conducted research, strong resource base, existing private and public initiatives to develop tourism and existing tourism businesses, with prospect to grow, are key identified strengths for South Albania. On the other hand, poor air accessibility of the broader region, poor internal accessibility of destinations and points of interest, along with weak stakeholder structure and no management system in place are main weaknesses of the region.

Still, a big opportunity for South Albania is the trend of growing demand for undiscovered and emerging destinations, national orientation towards tourism development, empowering Ministry of Tourism and Environment and potential of restructuring National Tourism Organisation and creating a DMO system.

Moreover, huge opportunities are many existing foreign and national initiatives already investing in tourism and improving tourism experiences. But, there are some threats to consider, first one being negative image of Albania that is influencing tourism positioning, competition in the region, further unsystematic development of tourism and negligence of law implementation and control.

In order to exploit on strengths and opportunities, strategic framework was developed for each of the municipality with defined vision, mission and positioning statement. Moreover, primary and secondary products are defined based on identified product development footholds. For each of the municipality growth targets are set based on market development footholds and rationale behind them.

The long-term vision for Berat is defined as following: Berat is a must-visit, year-round Albanian destination where all guests can engage in culture- and nature-based activities in authentic Albanian way.

The mission for Berat is to develop high quality and sustainable nature-based activities in surrounding environment and revive a living culture concept of Albanian arts and crafts through increased attractiveness and activity within historical core of the town, improved liveability of the town, implemented modern interpretation of traditional gastronomy and professionally organized events and entertainment programmes throughout the year.

Market positioning for Berat is defined as: Berat is a unique showcase of 2400 years of multi-layered history and architecture, presented through Ottoman ambience, Albanian traditional art, culture and crafts along with tasteful experience of authentic gastronomy nested within impressive nature, with the tagline: Get inspired.

For the next 5-year period, following strategic goals were set:

- Increase number of arrivals from 101,184 in 2017 to 180,000;

Over the last 5 years, number of visitors to Castle increased by 11,000 on average annually. With better promotion, stronger image, improvement of tourism offer and better accessibility, it is assumed that this number will grow at a faster rate, thereby reaching 180,000 in 5-year period, which is a growth of 78,816 guests, or 15,736 on average annually.

- Increase the number of beds from 1,143 to reach 3,000 beds;

Current occupancy rate of all accommodation establishments is estimated at 38.8%. With the increase in demand, new accommodation establishments will open to reach 41% occupancy rate on average annually. This rate is comparable to developed year-round destinations. In order to achieve that rate, Berat will need to offer 3,000 beds in all accommodation establishments.

- Increase average length of stay from 1.6 nights to 2.5 nights;

Current average length of stay is low, only 1.6 nights. By creating new motives for visiting and improving existing offer, average length of stay will increase for at least one more day.

- Increase the share of foreign guests from 70% to 80%;

Currently in Berat foreigners account for around 70% of arrivals, i.e. 70,828 guests. As the focus of Berat needs to be put on foreign guests, the goal is to double them in absolute number, i.e. reaching around 140,000 guests, which will account of around 80% of total arrivals.

- Achieve a share of individual foreign guests of at least 30% of total arrivals;

Berat should make significant step forward in the direction of product development and diversification and attracting more individual foreign guests, rather than touring groups. Thereby, the goal is that individual foreign guests account of at least 30% of total foreign arrivals.

- Increase average daily expenditure to reach at least 60 EUR.

According to PIUTD baseline survey conducted by the World Bank, daily expenditure of guests in Berat was 47 EUR. With diversification of tourism offer, new attractions and activities, urban upgrade and more commercial facilities, the expenditure will grow and the goal is the expenditure to increase in order to reach 60 EUR per day.

Berat will primarily focus on developing culture and touring, active and adventure. Secondary products include gastronomy, events and entertainment, MICE and short breaks.

The long-term vision for Përmetis defined as following: Përmetis an authentic Albanian countryside destination combining experience of unspoiled nature, natural healing thermal springs along with traditional music, food and products.

The mission is to deliver a sense of wellbeing in traditional and rural surrounding through activation of thermal product, creation of a hub for exploring surrounding natural sites and nature based outdoor activities and improved rural tourism competitiveness.

Market positioning for Përmetis elaborated in the following way: Experience traditional Albanian warm hospitality and best traditional gastronomy in a small and authentic countryside destination off the beaten path, with the tagline: Relax and recharge.

For the next 5-year period, Përmet will need to achieve following strategic goals:

- Double the number of arrivals from 17,884 to 35,768;

Përmet can double number of arrivals by activating globally competitive tourism resources, primarily thermal springs through thermal hotel/resort, and professionally develop other primary products. Being in the start-up phase, Përmet has the possibility for faster growth.

- Increase number of beds by 1,000 beds to 1,362 in different establishments (thermal resort, hotels, campsites, guest houses);

Current occupancy rate of all accommodation establishments is estimated at 21%. With opening of thermal resort, new average annual occupancy rate will need to reach at least 39%. This rate is based on occupancy rates of thermal destinations in developing phase. In order to achieve that rate, Përmet will need to offer 1,362 beds in all accommodation establishments, stressing out the importance of building thermal resort that will be a break through and push to the whole destination.

- Increase average length of stay to 4 nights;

With the development of thermal product, through sport, wellness or health, Përmet has a foundation to attract guests and offer such a service for which people will stay at least one week.

Combining average length of stay for all tourism products in Permet, the goal is for guests to stay on average annually 4 nights.

- Open at least one souvenir / gourmet shop and regularly offer at least 2 culinary related experiences;

Currently there are no souvenir or gourmet shops, neither culinary related experiences (cooking classes, engaging in production or preparation of food, etc.) the goal is to open at least one souvenir or gourmet shop that will serve as a distribution channel for local products, and create at least 2 culinary related experiences in cooperation with ProPërmet and local producers.

- Increase average daily expenditure to reach at least 55 EUR.

According to PIUTD baseline survey conducted by the World Bank, daily expenditure of guests in Përmet was 35 EUR. With diversification of tourism offer, new attractions and activities, higher quality accommodation establishments, professional activation of thermal springs, the expenditure will grow and the goal is the expenditure to increase in order to reach 55 EUR per day.

Being at the start-up phase, Përmet will need to focus on developing only primary tourism products, being health and wellness, active and adventure, rural tourism.

For Gjirokastra, following vision was developed: Gjirokastra is the most visited historical city of Albania.

The mission is to showcase different layers of Albanian history through revitalization of the Castle, urban and traffic reconfiguration (intermodal node, pedestrianization, central access square with parking, public spaces, sustainable access to the Castle), modernization and interpretation of cultural heritage, creation of a hub for exploring surrounding natural sites and nature based outdoor activities.

The positioning is defined in as following: Gjirokastra is a boutique Albanian destination showcasing rich and noble history, picturesque scenery, local people unique skills, traditions, isopolyphony and gastronomy, with the tagline: A privilege to explore.

For the next 5-year period, Gjirokastra will need to achieve following strategic goals:

- Increase number of arrivals from 97,294 in 2017 to 180,000;

Over the last 5 years, number of visitors to Castle increased by 15,000 on average annually. With better promotion, stronger image, improvement of tourism offer and better accessibility, it is assumed that this number will grow at a faster rate, thereby reaching 180,000 in 5-year period, which is a growth of 82,700 guests, or 16,500 on average annually.

- Increase the number of beds from 1,143 to reach 2,500 beds;

Current occupancy rate of all accommodation establishments is estimated at 36%. With the increase in demand, new accommodation establishments will open to reach at least 38% occupancy rate on average annually. This rate is comparable to developed cultural destinations that still see a seasonality pattern. In order to achieve that rate, Gjirokastra will need to offer 2,500 beds in all accommodation establishments.

- Increase average length of stay from 1.5 nights to 2 nights;

Current average length of stay is low, only 1.5 nights. By creating new motives for visiting and improving existing offer, average length of stay will increase to at least 2 nights.

- Increase the share of foreign guests from 75% to 85%;

Currently in Gjirokastra foreigners account for around 75% of arrivals, i.e. 72,900 guests. As Gjirokastra needs to focus on attracting even more foreign guests, the goal is to more than double

them in absolute number, i.e. reaching around 150,000 guests, which will account of around 85% of total arrivals.

- Achieve a share of individual foreign guests of at least 50% of total arrivals;

With the improvement of product portfolio and better connection with the coast, Gjirokastra will attract more individual foreign guests, rather than touring groups. Thereby, the goal is that individual foreign guests account of at least 50% of total foreign arrivals.

- Increase average daily expenditure to reach at least 60 EUR.

According to PIUTD baseline survey conducted by the World Bank, daily expenditure of guests in Gjirokastra was 48 EUR. With diversification of tourism offer, new attractions and activities, urban upgrade and better connectivity with the coast, the expenditure will grow to reach 60 EUR per day.

Gjirokastra will need to firstly put focus on developing culture and touring, as well as active and adventure. Second priority products are gastronomy, events and entertainment, golf and rural tourism.

Vision for Saranda is: Saranda is premium Albanian coastal Riviera destination.

The mission to be achieved is to deliver premium riviera experience through expanding/building nautical product, revitalisation and expansion of the promenade, creative interpretation and storytelling of cultural sites and improved accessibility.

The positioning statement is defined as following: Saranda is the most desired Albanian holiday destination leveraging on crystal clear sea, rich culture and heritage, offering diversified, price competitive experiences, with the tagline: A place to be.

In the next 5-year period, following growth targets are set:

- Increase number of arrivals from 464,682 in 2017 to 700,000;

Saranda will increase the number of arrivals by 50% and achieve 700,000 arrivals, which will be a 10% average yearly growth, according to Mediterranean destinations in their developing phase.

- Double the number of beds reach 27,500 beds and diversify accommodation offer;

Current occupancy rate of all accommodation establishments is estimated at 29%. With the increase in demand, new accommodation establishments will open to reach at least 35% occupancy rate on average annually. This rate is comparable to family Mediterranean sun and beach destinations. In order to achieve that rate, Saranda will need to double the number of beds.

- Increase average length of stay from 3.2 nights to 5 nights;

Current average length of stay is below average Mediterranean destinations. By professionally developing tourism products, creating new motives for visiting and improving image, the average length of stay should come to Mediterranean average of 5 days.

- Increase the share of foreign guests from 75% to 85%;

Currently in Saranda foreigners account for around 75% of arrivals, i.e. 350,000 guests. The goal is to increase the share of foreigners, i.e. reaching around 590,000 guests, which will account of around 85% of total arrivals.

- Increase average daily expenditure to reach at least 130 EUR.

According to PIUTD baseline survey conducted by the World Bank, daily expenditure of guests in Saranda was 118 EUR. With diversification of tourism offer, new attractions and activities, new marina, quality improvement and attraction of higher income guests, the expenditure will grow to reach 130 EUR per day

Saranda, as most developed among South Albanian destinations, will develop sun and beach, nautical and cruising, culture and touring as primary tourism products, along with secondary being gastronomy, events and entertainment, MICE, active and adventure and golf.

A joint vision for South Albania is developed as following: South Albania is a must visit, year-round destination, a synonym for unique blend of coastal and hinterland ambience. Here, where rich heritage meets scenic nature, guests can engage in diversified activities and create everlasting memories based on traditional gastronomy, events and rural experiences.

The mission of South Albania is to build positive image and create awareness through: Creation of tourism brand and professional management, development of tourism products in synergy with private and public sector and professional marketing of South Albanian tourism on target international markets.

Market positioning is defined as following: South Albania is a hidden gem of Balkans, a destination that combines coastal and hinterland landscape, offers diversified experiences in urban and rural surrounding and inspires guests to explore rich culture, history and UNESCO heritage, taste traditional cuisine, engage in outdoor activities and feel warm hospitality of Albanian people, with a tagline: The experience of authentic Albania starts here.

Primary products that will need to be developed are: culture and touring, active and adventure, rural tourism, sun and beach, nautical and cruising, health and wellness.

Internal and tourism market analysis

In order to assess current state of four designated municipalities, internal and tourism market analysis was conducted via primary and secondary research. Generally speaking, accurate and reliable data on basic tourism-related statistics just partially exists on national level. However, it must be strongly improved in order to meet international level of industry transparency and comparability standards. On the other hand, when coming to regional and destination level, there is a complete lack of any official tourism-related statistics. The database records provided by the Ministry of Tourism and the municipalities are inconsistent on recording tourism related data set. Thereby, in order to gather all available data, part of it was gathered from the Ministry of Culture, Tourism and Environment, municipalities and National statistics. Additionally, official municipal documents were consulted, a secondary research on TripAdvisor, Booking.com, and Google Maps was done. Moreover, Consultant has conducted primary research via interviews with key municipal stakeholders to gather some additional data. Still, many of the data, especially connected with tourism statistics, needed to be approximated and estimated based on different assumptions for each of the destinations, as shown in the analysis.

Connection to the wider Gjirokastër tourism region

Gjirokastra Municipality is located in southern part of Albania and its centre is Gjirokastra city. The territory of Gjirokastra Municipality is composed mostly from a mountainous and hilly terrain, as well as rivers valley plains. The Municipality was formed at the 2015 local government reform by merging previous Municipality of Gjirokastra and the communes of Cepo, Lazarat, Picar, Lunxhëri, Odrie and Antigonea. The area of the Municipality is 469.25 km² and 38 villages are part of it.

Gjirokastra is accessible only by national road in a very good condition. The main access road to Gjirokastra town, linking it also with neighbouring municipalities of Tepelene, Libohove and Dropull as well as the local settlements, is made from the highway SH4. This national highway

links the Municipality from north with the road SH8 coming from Tirana, from the south with the road towards Saranda and more in south with border crossing point of Kakavia with Greece. Another access road construction, through Kardhiqi valley and Kalasa valley, has begun and is planned to link Gjirokastra and Saranda by shortening the travelling distance and time.

The distance from Tirana Airport to Gjirokastra is 218 km, from Saranda to Gjirokastra 55 km, from Vlora to Gjirokastra 126 km and from Përmetto Gjirokastra 59.4 km, while the distance from Gjirokastra to Ioannina Airport (Greece) is 83.3 km.

The local settlements (villages) are linked with paved roads but generally the local roads are in a very bad condition, most of them are very narrow dirt roads. The main cultural heritage sites in the nearby area (Antigonea Archaeological Park and the Church of Saint Mary “Labova e Kryqit) are accessible by asphalted roads.

Gjirokastra Municipality has an intercity transport with the urban centres of Tirana, Saranda, Vlora, Korce and Permet. According to General Local Development Plan for Gjirokastra³ the bus service links Gjirokastra town with the following local destinations to: Lazarat, Sofratike, Zagori, Libohove, Polican and Kakavije.

The climate of Gjirokastra Municipality is characterized as Mediterranean. The average annual temperature for Gjirokastra is 14.4°C. There is a high humidity in territory of Gjirokastra Municipality along the Drinos River valley; the annual rainfall quantity is between 1,600 and 2,000 mm. The mountains are covered by snow in the winter. The average annual temperatures in mountainous areas reach 8-10°C, with January recording the lowest average temperature of 1-2°C and July with the highest temperature of 20°C.

The old city of Gjirokastra is developed at the slopes of the hills surrounding the Castle. The old city of Gjirokastra, adopted as a "Museum City" by the Albanian government in 1961, was declared a UNESCO's World Heritage Site in 2005, described as “a rare example of a well-

preserved Ottoman town”. The old town, known as the historic centre (the neighbourhoods of Old bazaar, Palorto, Varosh, Meçite, Dunavat, Manalat, Cfake, Pllakë), features a series of outstanding two-story stone houses which were built in the 17th century, a Bazaar, an 18th century mosque, and two churches of the same period. The National Folklore Festival is held every five years at the castle garden. Except the historic area, the territory of Gjirokastra Municipality and other neighbouring areas have the potential for active nature-based tourism activities, too.

According to INSTAT, the GDP in current prices for 2015 in the Gjirokastra Region was 247.4 million EUR. GDP per capita was estimated at 3,596 EUR, and it was higher compared to the national GDP per capita that was 3,547 EUR.

In 2017, according to INSTAT there were 2,122 registered businesses in the Municipality of Gjirokastra, out of which 62.5% were businesses relying on services (trade, transport and storage, accommodation and food service, information and communication, other services). 30% of registered businesses were engaged into agriculture, forestry and fishing businesses and 7.5% in industry and construction. According to General Local Development Plan for Gjirokastra referring to INSTAT data, the weight of these sectors in 2011 was respectively 66.7%, 24.6% and 8.7%, showing a 5.4% increase of the agriculture sector in 2017 compared to 2011.

Rural areas of the Municipality play a major role in socio-economic development with livestock and agriculture being the main economic activities. The main agriculture products are fruits and vegetables and recently there is an increase of vineyards in the areas of Picari and Lunxheria. The rural area is known for its cattle breeding and qualitative livestock products. Livestock farming in Gjirokastra Municipality is based in small family farms. Tourism services have increased significantly, especially in the city of Gjirokastra, following the year 2005 when Gjirokastra was inscribed as a UNESCO site.

According to Census 2011, the Gjirokastra Municipality had a total population of 25,301 inhabitants at a territory of 469.25 km² and had a density of 53.91 inhabitants per km². According to the latest census, between 2001 and 2011, Gjirokastra lost 14% of their urban population because of emigration.

Potential for tourism supply from Gjirokastër

According to the data provided by the Ministry and additional establishments identified via online travel platforms, there are 40 hotels, 4 hostel, 36 guesthouses, 3 B&Bs and 2 campsites in Gjirokastra.

Table 6 Registered and identified capacity of accommodation establishments in Gjirokastra

Type of establishment	Number of establishments	Number of beds
Hotels	40	935
Hostels	4	60
Guesthouses	36	100
B&B	3	16
Camping sites	2	-
Total	85	1,111

According to the list of the accommodation establishments provided by the Ministry of Tourism, in Gjirokastra there is only 1 hotel with 80 beds in the centre of the old town and 2 others with 60 beds each in lower part of the city and they account for 21.4% of the total hotel capacities in Gjirokastra.

Some 55 small hotels and guesthouses are located in the historic area. Most of them are adopted in the renovated old Ottoman style houses. The accommodation businesses are mostly small and medium enterprises run as family businesses.

Referring to the interviews carried out with the accommodation establishments during the field mission, the accounted ADR for upscale hotels is 45-60 EUR, for mid-range hotels is 30-45 EUR and for hostels is 11-13 EUR.

Cultural attractions	
UNESCO World Heritage List	<i>Gjirokastra's Historical Centre:</i> <i>Bazaar</i> <i>Castle Isopolyphonic music</i>
Monuments	<i>The Big Bridges of Dunavat, Hammam and the Seven Springs, Antigonea Archaeological Park, Paleokastra castle, Kardhiq castle, Castle of Libohova, Kollorca bridge, Roman amphitheatre ruins of Adrianopoli, Ruins of ancient theatre in</i>

	<i>Sofratikë,</i>
Vernacular architecture prototypes	<i>Zekate house, Skenduli house, Babameto house, Babaramo house, Ismail Kadare house, Inn of Zagoria, Inn of Dulaj, Hammam of 7 Fountains</i>
Museums and galleries	<i>Gjirokastra museum and Army museum in the Castle, Ethnographic Museum, Cold War Tunnel Museum, Art Gallery “Gjin Zenebishi”</i>

Sacral heritage attractions

Churches and monasteries	<i>Mitropolia church, Church of St. Mehilli, Church of Saint Mary (Labovë e Kryqit), Church of St. Mary Sleeping in Sopik</i>
Mosques	<i>The Bazaar Mosque, Bektashi Tekke of Melan, Tekke of Zalli</i>

Natural attractions

Mountains	<i>Mountain “i Gjere”, Shendelli-Lunxheri-Burreto Mountains ridge</i>
Rivers and canyons	<i>Drino River, Kardhiq River, waterfall and canyons of “Gurra e Progonatit”, water source of Glina</i>
Monuments	<i>National Natural Park of Sotira, Natural park of Viroi, 600-years old Plan tree of Libohova</i>

Gastronomy	
Infrastructure	<i>15 restaurants in hotels and 30 restaurants from TripAdvisor</i>
Cuisine	<i>Traditional, Mediterranean and Greek</i>
Local ingredients	<i>Vegetables, fruits, dairy products, meat, honey, herbs</i>
Events	
Cultural	<i>National Folk Festival (every five years), Folk International Festival "Argjiro-Fest", Festival "Divani Lunxhiot", Day of Isopoliphony, European Heritage Days (Craft Fair)</i>
Gastronomy	<i>Dough festival</i>
Other	<i>Wood and stone carvings</i>
Honor of Gjirokastra	
Personalities	<i>Musine Kokalari (1917-1983), linguistic Eqerem Çabej (1908- 1980), writer Ismail Kadare</i>

Growth in regional tourism demand

A total number of 97,294 arrivals in Gjirokastra were estimated for the year 2017 with a total of 146,730 overnights. Average length of stay in Gjirokastra is 1.5 nights on whole year basis. Arrivals and overnights were estimated based on data regarding occupancy rate and average length of stay gathered through interviews. The average occupancy of the accommodation establishments in Gjirokastra is reflecting the seasonality pattern. Occupancy rates are around

60-70% during the peak months (July-September), around 50-55% during the shoulder season (May, June and October) and very low during the spring and winter months.

The seasonality in Gjirokastra is not as sharp as in the coastal destinations. From March to end of October there are more organized groups (70-80%) while individuals come year-round. Package tours with the purpose of active and adventure activities are mainly organized from March to May and cultural tours from May to October with peak during summer period July – August.

Table 7 Visitors to the national cultural attractions in Gjirokastra

Key attractions	2013	2014	2015	2016	2017
<i>Gjirokastra Castle</i>	9,023	32,317	34,499	62,503	76,666
<i>Antigonea Archaeological Park</i>	7,339	528	424	805	1,023
Total visits	16,362	32,845	34,923	63,308	77,689

In 2017, 76,666 people visited the Castle, and 1,023 visited Antigonea Archaeological Park. Number of visits to the Castle is increasing each year, with the highest increase in 2014 compared to 2013.

Table 8 Visitors to the national cultural attractions in Gjirokastra, year 2017

Key attractions	Domestic	Foreigners	Visitors with no tickets	Total Visitors

<i>Gjirokastra Castle</i>	23,767	50,059	2,840	76,666
<i>Antigonea Archaeological Park</i>	102	318	603	1,023
Total visits	23,869	50,377	3,443	77,689

In 2017, there were 31% domestic visitors to the Castle and 65.3% foreigners while the rest were visitors without tickets.

Table 9 Visitors to the Gjirokastra Castle from 2013 to 2017 (only visitors with tickets)

Visitors	2013	2014	2015	2016	2017
<i>Domestic</i>	2,635	11,086	6,865	14,437	23,767
<i>Foreign</i>	5,763	19,966	26,302	46,008	50,059
Total Visitors	8,398	31,052	33,167	60,445	73,826

In the period observed, domestic visitors to the Castle grew 73% on average annually and foreign visitors 72% on average annually.

According to the interview with the director of Gjirokastra Museums during the field mission, some 11,000 people visited the Ethnographic Museum in 2017, while the house of Ismail Kadare was visited by 3,000 visitors and around 5-6,000 students/pupils.

According to the interviews with the Albanian tour operators offering Gjirokastra (South Albania) in their tours and with tourism businesses during the field mission in Gjirokastra, two groups of guests were identified:

- Overnight tourists:
 - Individuals visiting Gjirokastra as part of their tour in Albania or in transit from Greece. They mostly stay 1 night in Gjirokastra in high season and up to 3 nights in low season as they also engage in nature-based activities;
 - Package tours, spending 1-2 overnights in Gjirokastra as part of the overall tour in South Albania with the purpose of active and adventure activities (hiking to Zagoria and Pogoni areas, hiking to Kurveleshi and Zagoria areas, horseback riding from Gjirokastra to Ionian coast);
 - Foreign tourists on cultural tours with 1-2 nights in Gjirokastra coming with the purpose of visiting historic centre of Gjirokastra town;
 - Business tourists with overnight in Gjirokastra town.
- Same day visitors:
 - Individuals and package same day tours visiting historic centre of Gjirokastra town; they mainly come from Saranda.

Referring to the interviews done with tourism businesses during the field mission in Gjirokastra and Tirana based tour operators offering Gjirokastra (South Albania) in their tours, the main source markets are Germany, France, Italy, UK, Austria and Switzerland, followed by Spain, Netherlands, Poland, USA and Australia. International market counts for around 70-80%. The rest are Albanians (Albanian citizens, Albanian expatriates and Albanian citizens of Kosovo). Guests come both in organized package bus tours and individually in small groups of friends.

Most of tourists visiting Gjirokastra are second and third age followed by other younger travellers. Tourists participating in package tours with the purpose of active and adventure activities are mainly of age 40 and 50 and they travel in couples and group of friends, but also as individuals gathered in a group.

An UNDP Survey in 2007 at Gjirokastra (UNESCO World Heritage City) revealed the following data on the visitors' profile: Visitors coming from the UK were the most represented, followed by those from France, Germany, Italy and USA. There were more male than female visitors. The visitors were mostly young adult couples from EU countries, middle-class and very well educated, who stayed one or two days as part of the tour including other Albanian sites or less frequently Greek sites. They come mostly independently and for pleasure, by public bus or car, but organized trips are also present. According to a research paper in 2015, some 30,000 tourists visited Gjirokastra in 2013. The majority of tourists were from Western Europe visiting Gjirokastra were Germans with 17%, followed by those from Greece with 14%, Italy 13%, France 9%, and Britain 8%. Tourists from Eastern Europe (Bulgaria, Poland, Russia, Romania, etc.) represented 33%. The majority of them, 93% visited Gjirokastra for leisure and 5% for business.

According to PIUTD baseline survey conducted by the World Bank, daily expenditure of guests in Gjirokastra was 48 EUR.

According to the interviews done with restaurants during the field mission in Gjirokastra, the average check paid by tourists in the restaurant was 6-8 EUR for individuals with starter and main dish and 8-10 EUR for groups with 3 course menus.

Key findings are as follows:

- South Albania is a relatively new destination in tour operators' itineraries and tour packages.

- Tour operators started only recently to sell South Albania, thereby number of people traveling is modest and there is no historical data to come to a relevant conclusion.
- Tour operators are mostly serving their domestic market while in some cases USA and Australian market were emphasized as increasingly important with a current share between 5-10% of the total packages sold to South Albania.
- Main tourism products and motives for traveling to South Albania are culture (with emphasis on UNESCO heritage), nature and scenery, outdoor activities including very popular walking holidays, study tours and sun & beach (Saranda).
- Tours are often sold as part of longer, 10-15 days tour trip on the Balkans which makes touring the most important tourism product in South Albania.
- When only tours in Albania are being sold, tour operators include both north and south destinations to their offers.
- More than 50% of all people traveling to South Albania are couples between 50-60 years old, while other market segments include group of friends, families without children and single people.
- Most of agencies reported that their business in South Albania is focused on summer months, starting from May to mid-October.
- All interviewed tour operators are cooperating with inbound DMCs situated in Albania, both foreign and local, relying more on foreign experienced agents.
- One of the biggest bottlenecks in tour operating business in South Albania is considered to be the lack of professionalism in terms of local DMCs and guides who are not trained and prepared for satisfying global market needs, lack successful business models and are still on low competence levels.

- In addition, few agencies faced high administrative barriers and bureaucracy problems when starting their business in South Albania, difficulties in finding cooperative and reliable business partners as well as lack of tourism business standardization (e.g. no accommodation categorization, no official quality standards, no official websites etc.).
- Generally, staff in the tourism industry lacks good tourism education, professional trainings, hands- on expertise and skills, including foreign language knowledge.
- Although still with a relatively small base, tour operators are constantly increasing the number of travellers going to Albania (between 5-10% annually) which implies there is further place for improvement in terms of volume.
- According to most of the tour operators, Albania is still an undiscovered, unspoiled Balkan area with great development potential, yet to be discovered by travellers, with value for money being one of the biggest USPs.
- Greatest growth potential is seen in following tourism products: sun & beach, outdoor, gastronomy and culture.
- Most of agencies claimed that their customers don't have much knowledge about South Albania and mostly remain surprised by what they see.
- Albania is improving its image in travellers' minds, moving from the perception of the "wild" country towards a more hospitable and appealing tourism destination.
- Most of the findings are matching on all selected markets and there are no discrepancies among different source markets.

Strategic takeaways for South Albania

- The development of tourism in South Albania started only recently, mostly after the fall of the communist regime and is still at the very beginning of the life cycle.
- Only recently tourism gained a stronger interest of political decision makers at the national and local level considering it as one of the priority economic sectors of South Albania and putting it at on development agenda.
- Moreover, the potential of Albania was recognized by international donor and financial institutions that are heavily investing in South Albania, primarily in urban upgrading, improving general infrastructure, and increasingly, in developing tourism.
- Strongest impediment for tourism development is a complete lack of management structures, thereby no coordination among national and regional level offices in charge of tourism management.
- Because of its start-up phase, on regional and destination level, there is complete lack of any official tourism-related statistics, which is one of strong infrastructural impediments for stronger tourism development and planning processes.
- Currently, there is a big gap in number of registered accommodation capacities and real market status, implying that there is a considerate number of non-registered accommodation establishments operating in the grey market.
- Moreover, on the national level there is no official categorization system in place; some of the registered accommodation establishments are categorized by Authentic Albania Quality Mark, which is a voluntary system.
- On the local level, none of the municipalities in South Albania collects bed tax, thereby losing the opportunity for making revenue from tourism.

- South Albania is dominantly a rural area which was historically oriented towards primary economic sector, which is still very strong. Still, some bigger cities and more developed areas started changing their economic orientation towards services.
- South Albania has a relatively young population, but there is an above average unemployment rate recorded and strong migration process, with people emigrating from rural areas to cities and emigrating abroad, most of them to Greece. Socio-economic situation puts additional challenge of finding available workforce with suitable professional qualification.
- Currently, tourism is developed on the coast with sun and beach being the strongest product. The continental part is still under development with strong natural resources enabling outdoor activities and development of rural tourism.
- With the inscription of three sites under the UNESCO World Heritage List, South Albania evoked additional international interest. Along with UNESCO sites, the market started to discover other cultural sites and resources.
- Still, the whole area is inhibited by poor air accessibility with the broader region, poor road conditions and ferry and speedboat frequencies below market need.
- At the moment, accommodation sector in South Albania is characterized by a limited choice of accommodation types and dominated by small, midscale accommodation properties. Majority of accommodation establishments are small, family-run hotels and private accommodation establishments. In the historical parts of the cities, accommodation properties are renovated historical houses.
- Only Saranda town has a larger number of higher capacity hotels that can accommodate organized bus tours. Other destinations in South Albania have on average between 15-20 beds per establishments.

- South Albania is part of organized Balkan or Albanian tours. Guests coming to such tours are seniors coming from dominantly Western and Northern Europe and USA and mostly motivated by history and culture.
- Apart from such tours, there are individuals coming to the coast for a summer holiday and tours coming for active holiday in nature. Guests coming for summer holidays on the coast are mostly families, younger people and older couples, while active based tours bring mainly middle ages Western Europeans to South Albania.
- Foreign markets account for around 70% of total guests while others are Albanians or expats.
- Annual average length of stay of tourists in the South of Albania is relatively low, ranging from 1- 2 nights, with higher average length of stay on the coast of almost a week.
- Seasonality pattern is very much different in such a broad geographical area. In some of the central parts, mostly around Berat, tourism can be enjoyed almost year-round, while other destinations, because of the weather, bad road conditions and product portfolio, are more seasonal.
- There is a visible increase in foreign outbound and tour operators' interest for South Albania, happening mostly because of the rich cultural and natural heritage, supported by the inner stakeholder change and orientation towards service sector, who are improving the whole tourism offer and professionalizing the industry.

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