



# Tourism

Strategy and Action Plan  
for the Prespa Lakes Basin  
2012-2016

This publication was produced with technical support from the United Nations Development Programme (UNDP), within the Integrated Ecosystem Management in the Prespa Lakes Basin project.

The Integrated Ecosystem Management in the Prespa Lakes Basin project is implemented by UNDP with financial support from the Global Environment Facility (GEF). Its overall objective is to help the region's people with long term economic and social development, conserve the rich biodiversity and protect the waters of the Prespa Lakes Basin.

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# Tourism Strategy and Action Plan for the Prespa Lakes Basin

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# List of acronyms

BERIS	Business Environment Reform and Institutional Strengthening Project
BfN	Bundesamt für Naturschutz (German Federation for Nature Conservation)
CBT	Community-based tourism
CEPA	Developing Communication, Education, Participation and Awareness Programme
CRPPR	Centre for Development of the Pelagonija Planning Region
DMO	Destination management organization
EC	European Commission
EIA	Environmental impact assessment
EQO	Environment quality objective
EU	European Union
FDI	Foreign direct investment
GDP	Gross domestic production
GEF	Global Environment Facility
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
HACCP	Hazard analysis and critical control points
IT	Information technology
ITB	Internationale Tourismus-Börse
IUCN	International Union for the Conservation of Nature
LAC	Limits of acceptable change
KfW	Kreditanstalt für Wiederaufbau (German Reconstruction Credit Institute)
MAB	Man and the Biosphere Programme
n/d	Not dated
OECD	Organisation for Economic Cooperation and Development
OENM	One Europe, More Nature
PPCC	Prespa Park Coordination Committee
PPMC	Prespa Park Management Committee
PPP	Private-public partnership
RSCN	Royal Society for the Conservation of Nature
RSPB	Royal Society for the Protection of Birds
SEZ	Special Economic Zone
SME	Small and medium-sized enterprise
SPP	Society for the Protection of Prespa
SWOT	Strengths, weaknesses, opportunities, threats
TIC	Tourist information centre
TOMM	Tourism Optimization Management Model
TSAP	Tourism Strategy and Action Plan
UNDP	United Nations Development Programme
UNEP	United Nations Environment Programme
UNESCO	United Nations Environmental, Scientific and Cultural Organisation
UNWTO	United Nations World Tourism Organisation
USAID	United States Agency for International Development
VAMP	Visitor Activity Management Planning
VERP	Visitor Experience and Resource Protection process
VFR	Visiting friends and relations
VIM	Visitor impact management
WCPA	World Commission on Protected Areas
WWF	Worldwide Fund for Nature



*photo: Lj. Stefanov*



## Executive Summary



In February 2010 an international agreement was signed between the Ministries of Environment of the three countries sharing the Prespa Lakes basin and the European Commission. Under this agreement, the three states are legally bound to establish permanent structures of cooperation in order to develop a common strategy and to apply measures both for the protection of the natural environment and the human activities in the area.

This Tourism Strategy and Action Plan is therefore timely, and is intended to be a forward-looking visioning document which will help the three governments to secure future funding for implementation of responsible tourism initiatives in the Prespa lakes basin.

The development of the tourism industry in the area is seen as an important way of helping to preserve and restore the Prespa Lakes basin's environment, and to provide important alternative income sources in an economically challenged area.

Research has shown that the Prespa Lakes basin's greatest tourism strengths lie in its nature and heritage and that it has a developing ecotourism product. Facilities to foster nature-based and heritage-based tourism exist but the area is suffering from a lack of profile and declining market interest, and the very important domestic market in each country is increasingly holidaying elsewhere. There have been many tourism-related support initiatives in the area in the past, but their sustainability is mostly questionable. There is a need for projects to be more strongly embedded in local institutions which take responsibility for continuing them.

The accommodation base in Albania and the former Yugoslav Republic of Macedonia is weak, with some developments in community-based tourism in the former Yugoslav Republic of Macedonia and grant aided expansion in Greece but little else. Solid waste issues undermine tourism potential in Albania especially. National Parks are the area's strongest tourism asset at present and sustainable tourism capacity is strongest within some of these organizations. Seasonality is a major challenge in all three countries and products and events have not been developed to address this. There is an expanding tourist information centre (TIC) network that can be built upon. There is no real trans-boundary tourism on offer at present and there are very few private sector tour operations in the area, although some small activity tour operators are developing in Greek Prespa: These private sector operations will be vital for future tourism development.

A continuation of previous support mechanisms related to ecotourism is unlikely to be a sufficient way forward to reverse currently declining numbers of visitors to the Prespa Lakes basin. A more ambitious approach is needed. Critically, other than National Parks, there are no flagship tourism products to put Prespa 'on the map' at present and to attract new markets. Visitor numbers are small, except for during holidays and in high summer. Tourism capacities in municipalities are generally weak. Despite these challenges however the Prespa Lakes basin could undoubtedly offer a tourism product to meet the needs of a growing tourism markets. Its product offer however needs to be based on these needs, as determined through continuous market research, and driven by quality and value for money. New market-led quality tourism product needs to be developed in the Prespa Lakes basin; the environment needs to be better protected; and awareness of tourism options in the area needs to be created.

The vision for tourism in the Prespa Lakes basin is therefore as follows: The Prespa Lakes basin will be developed as a model of sustainable and responsible tourism development, building on its superb natural and cultural features. It will have high quality attractions and activities for both domestic and international visitors in a stunning landscape protected by National Parks. It will continue to develop as a model of cross-border cooperation to the economic and socio-cultural benefit of its inhabitants. It will be managed as a trans-boundary Biosphere Reserve and achieve World Heritage Site enlisting.

The main product themes which the Prespa Lakes basin will in future offer to meet growing market needs are ecotourism; nature (including bird-watching); culture; activity tourism; and – once occupancies have improved – environmentally sensitive accommodation, resort and spa developments.





*A view from Golem Grad  
photo: Lj. Stefanov*

Under these themes high quality tourist attractions and facilities are needed to put Prespa 'on the map' in terms of international tourism awareness and to drive up occupancies. Some flagship products already exist, in particular National Parks, but other new product is also needed that will attract new markets and recapture old ones. Given the present situation of fairly weak market demand and (in particular) low occupancy, major commercial private sector investment is unlikely, unless motivated by altruistic reasons (such as returning emigrant investment). Donor and government intervention is therefore required and indeed justified, to stimulate demand through product development and marketing.

A series of potential flagship investments are outlined in this Action Plan for future funding, to attract new visitors and to extend length of stay. These are themed in terms of ecotourism, nature and culture and are as follows:

- Bringing forward the trilateral area as a trans-boundary Biosphere Reserve and accessing support under the United Nations Environmental, Social and Cultural Organization (UNESCO), Man and Biosphere (MAB) programme.
- Assisting National Parks to secure funding for key products and trilateral product theme developments.
- Establishing a high quality Prespa Tourist Information Centre Network, bringing together existing and planned facilities.
- Establishing an international Prespa Ecotourism Academy to train guides and others in ecotourism.
- Improving visitor management and providing a unique high quality visitor experience on Prespa Lakes' islands.
- Developing a flagship Prespa Lakes Discovery Centre.
- Raising selected beaches to Blue Flag standard.
- Developing a tourism viewpoint with commercial and community tourist facilities in Albanian Prespa.
- Bringing forward existing proposals to designate Prespa Lakes basin as a World Heritage site (culture and nature);
- Developing a high quality monastery tourism experience.
- Providing small and medium-sized enterprise (SME) support for developing activity tourism.
- Developing shoulder and off-season events and conferences.
- Delivering (with partners) a detailed marketing strategy to raise awareness of Prespa Lakes basin and attract selected target markets.
- Putting in place continuous tourism training support for the private and public sectors.

Five short term pilot projects are also suggested and the importance of reopening the Dolpno Dupeni border crossing is stressed. The role of the

Prespa Park Management Committee in tourism is defined as leading in the following areas which are in accordance with the Joint Statement of February 2010:

- The establishment of the Prespa Park Biosphere to ensure both environmental protection and the enhancement of economic livelihoods;
- Accessing funding for strategic trans-boundary projects, such as the flagship projects outlined in this strategy;
- Supervising their delivery with effective cross-border elements;
- Commissioning strategic research;
- Publishing information on water quality and tourism ; and
- Monitoring of strategic progress and cross-border cooperation.

Marketing objectives for the trilateral Prespa Park, to be delivered with partners, are as follows:

- To create awareness of the Prespa Lakes basin as a superb location for ecotourism, nature, culture and activities through partnering with national tourist board and other regional and domestic marketing initiatives.
- To promote trans-boundary tourism which extends length of stay in the region by marketing specific trans-boundary products (as they are developed).
- To promote off-season products and events in the Prespa Lakes basin.
- To make holidays in the Prespa Lakes basin easier to book.

The strategy concludes that if a serious commitment exists to develop tourism in the Prespa Lakes basin and use it to help preserve the environment, real tourism investment is required from donors and governments. More attractions and quality facilities need to be developed in a sensitive and well managed way in order to attract more people to visit the area and spend time and money in it; and to encourage more quality accommodation development and private sector investment.



## 1. Introduction



Galičica National Park  
photo: Lj. Stefanov

The trilateral Prespa Park, which includes both the Micro and Macro Prespa Lakes and their surrounding mountains, covers an area of approximately 1,600 square kilometres. The park was declared on World Wetlands Day, 2 February 2000. The area is designated as a Wetland of International Importance under the Ramsar Convention. The three countries which share the Prespa Lakes basin have designated parks or protected areas within their own territories as follows:

- The National Park of Prespa (designated in 1999) is in Albania;
- This adjoins the National Park of Galičica (1958, and covering the mountainous watershed between Lakes Ohrid and Macro Prespa) in the former Yugoslav Republic of Macedonia. The Pelister National Park (1948)<sup>1</sup> and the Ezerani Strict Nature Reserve<sup>2</sup> (1996) are also within the park boundaries in the former Yugoslav Republic of Macedonia.
- The Prespa National Forest (1974), designated as Prespa National Park (2009), is protecting most of the lakes' headwaters. It includes lakes Micro and Macro Prespa and their basin.

The Prime Ministers' declaration in 2000 led to the definition of four key objectives for the trilateral Prespa Park, as follows:

- Objective 1: Conservation of ecological values and functions and of the biological diversity in the Prespa Park area;

<sup>1</sup> Most of this park lies outside the watershed however.

<sup>2</sup> This designation is currently under review and it is likely that the Ezerani Reserve will be re-categorized as International Union for the Conservation of Nature (IUCN) Category III (protected area managed mainly for conservation) rather than the current Category I (strict nature reserve).



- Objective 2: Enhance opportunities for the sustainable economic and social development of the local societies and the wise use of the natural resources for the benefit of nature, local economics and future generations;
- Objective 3: Preservation of cultural values such as monuments, traditional settlements and traditional human activities and cultural events that promote the sustainable management of the natural resources;
- Objective 4: Seek participation, co-operation and involvement in decision-making and in benefit or loss sharing of stakeholders in the three countries.

In February 2010 an international agreement between the Ministries of Environment and the European Commission was signed. Under this agreement, the three states are legally bound to establish permanent structures of cooperation in order to develop a common strategy and to apply measures both for the protection of the natural environment and the human activities in the area. This agreement sets priority issues, in particular water management, and includes the elaboration of an integrated water management plan for the basin, as required by the EU Water Framework Directive.

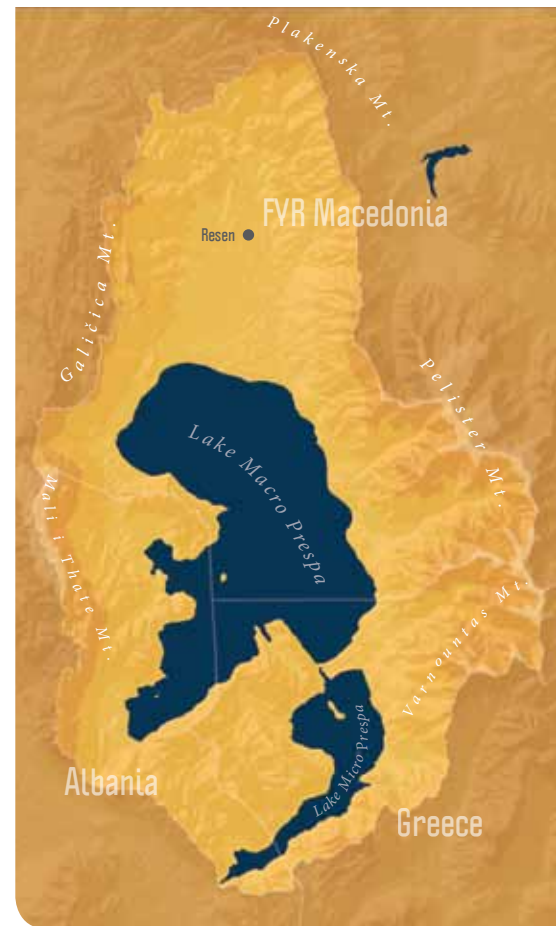
The joint declaration aims to

*enhance cooperation among competent authorities and stakeholders in the three States in order to maintain and protect the unique ecological values of the Prespa Lakes basin and prevent and/or reverse the causes of its habitat degradation.*

Tourism is referred to, in so far as the joint parties recognise

*common responsibility for the conservation of the Prespa Lakes basin ecosystem and its components as well as for its natural beauty, as a basis for the economic and social well being of its inhabitants and for creating economic development opportunities (including agriculture, fisheries and tourism).*

This Trilateral Tourism Strategy and Action Plan aim to provide strategic direction for the development of the tourism sector in the Prespa Lakes basin for at least a five year period. It will guide the public and private sectors in tourism investment, management and monitoring in line with governing ecosystem management principles and international best practice in a trans-boundary context



**Map 1. Prespa Park Area**

*Note: Boundaries and names shown on this map do not imply official endorsement or acceptance by the United Nations.*



*photo: Lj. Stefanov*



# Part I Strategy





photo: Lj. Stefanov

## 2. Assessment of tourism demand

### 2.1 Global tourism demand

UNWTO points out that international tourism's resilience is illustrated in recent performance: following a decline in 2009 international tourism rebounded strongly in 2010 despite continuing recession.

Global international tourist arrivals were up 6.6 percent to 940 million and international tourism receipts grew by 4.7 percent in real terms to reach US\$ 919 billion. International tourist arrivals are estimated to have grown by a further 4.5 percent in the first half of 2011, consolidating the increase registered in 2010. Between January and June of this year, the total number of arrivals reached 440 million, 19 million more than in the same period of 2010. Growth in advanced economies has maintained strength and is closing the gap with emerging economies which have been driving international tourism growth in recent years (UNWTO, 2011a).

International tourism receipts were more affected by the financial crisis and recovered somewhat slower than arrivals in 2010. Following an encouraging first half of 2011, growth in the remainder of the year is expected to soften somewhat as recent months have brought increased uncertainty, hampering business and consumer confidence.

Globally, the number of tourists travelling outside their countries is projected to reach 1.8 billion within two decades, with emerging economies responsible for the highest growth rates, according to UNWTO's Tourism Towards 2030 report (2011b). This report forecasts an average of 43 million additional people becoming international tourists every year. This figure, which corresponds to a 3.3 per cent annual increase, represents a more moderate growth pace in the industry than in previous years.

The link between tourism and protected areas is also predicted to become more important as tourism activities are relying more on natural heritage combined with cultural heritage as part of a global trend. Tourism linked to nature conservation will also play a bigger role in combating climate change the United Nations Environment Programme (UNEP) predicts. At the same time protected areas are also becoming more interested in the role of tourism in supporting conservation initiatives. Other aspects of this trend include an increased desire for educational experiences, and growing expectations of quality and value for money. The Internet is increasingly replacing the travel agent as the relied-upon source for 'objective' guidance on holiday choice. It has initiated a truly global marketplace for holiday options, including flights and accommodation. And estimated 80 percent of tourism bookings are now made using reference to the Internet, but possibly only 10 percent of tourism businesses have online booking facilities. Thus is a particular challenge for rural tourism.

## 2.2 Tourism demand in the region

For the first half of 2011 Central and Eastern Europe has seen good growth (9 percent), and destinations in Southern and Mediterranean Europe are up 7 percent due to declines in visits to North Africa and the Middle East. Arrivals to Southern and Mediterranean Europe, and to a lesser extent for Central and Eastern Europe, have however risen steadily over the past decade, as illustrated in table 1.

	2006	2007	2008	2009	2010
Central & Eastern Europe	69.3	87.5	100.0	90.2	95.0
Southern & Mediterranean Europe	132.5	152.3	170.4	161.4	169.0

**Table 1.** European regions, international tourist arrivals (millions) Source: UNWTO, 2011

## 2.3 National tourism performance

### 2.3.1 Albania

Albania is seeing rapid tourism growth at present and was named Lonely Planet's number one tourism destination to visit in 2011<sup>3</sup>.

Table 2 outlines Albania's recent visitor arrivals figures.

	2006	2007	2008	2009	2010
<b>Arrivals (thousands)</b>					
<b>Total</b>	937	1,127	1,420	1,856	2,417
Overnight visitors (tourists)	..	1,062	1,337	1,792	2,347
Same-day visitors	..	65	83	64	70
<b>Arrivals by region (thousands)</b>					
<b>Total</b>	937	1,127	1,419	1,855	2,417
Africa	0	0	0	0	3
Americas	42	52	61	60	62
East Asia and the Pacific	8	10	15	28	11
Europe	857	1,061	1,335	1,513	2,239
Middle East	1	1	1	1	1
South Asia	0	0	1	1	1
Other not classified	28	2	6	252	100
<b>Arrivals by main purpose (thousands)</b>					
<b>Total</b>	937	1,126	1,419	1,856	2,417
Personal	889	1,060	1,340	1,804	2,370
* holidays, leisure	227	187	227	521	1,095
* other personal purposes	662	873	1,113	1,283	1,275
Business and professional	48	66	79	52	47

Table 2. Albania tourism arrivals 2006-2010  
Source: UNWTO

93 percent of Albania's visitors<sup>4</sup> come from within Europe and within the 2010 figure of 2,239,000 visitors, Serbia accounted for 52 percent. The other dominant markets are also neighbouring regional markets: the former Yugoslav Republic of Macedonia (276,000); Italy (125,000); Montenegro (124,000); and Greece (113,000). Of wider European markets the United Kingdom of Great Britain and Northern Ireland accounted for 62,000 visitors in 2010 and Germany 56,000. The United States of America supplied 50,000 visitors and Turkey was also an important market with 34,000. France supplied 26,000 visitors and Switzerland 22,000.

Inbound tourism expenditure was also rising until 2010, as illustrated in table 3.

Table 3. Albania total visitor expenditure 2006-2010  
Source: UNWTO

	2006	2007	2008	2009	2010
<b>Expenditure (US\$ millions)</b>	1,057	1,479	1,849	2,012	1,780

Average length of stay per visitor has increased in commercial accommodation from 2.2 nights in 2006 to 2.5 nights in 2010.

<sup>3</sup> Lonely Planet (2011) Best in Travel. Available at: < <http://www.lonelyplanet.com/italy/travel-tips-and-articles/76164>>

<sup>4</sup> Based on arrivals at national borders.

## 2.3.2 The former Yugoslav Republic of Macedonia

The country is also seeing very rapid tourism growth as outlined in table 4.

	2006	2007	2008	2009	2010
<b>Arrivals (thousands)</b>					
<b>Total</b>	3,369	3,903	4,058	4,553	5,000
Overnight visitors (tourists)	202	230	255	259	262
Same-day visitors (excursionists)	..	..	..	..	..
<b>Arrivals by region (thousands)</b>					
<b>Total</b>	202	230	255	259	261
Africa	..	..	..	..	..
Americas	9	9	10	9	10
East Asia and the Pacific	3	5	5	4	10
Europe	187	212	236	240	241
Middle East	..	..	..	..	..
South Asia	..	..	..	..	..
Other not classified	3	4	4	6	..

**Table 4.** National tourism arrivals 2006-2010  
Source: UNWTO

Europe is also the dominant visitor source supplying 92 percent of arrivals to the former Yugoslav Republic of Macedonia. The five most important markets for non-resident overnight visitors in hotels in 2010 were Serbia (29,000), Greece (24,000), Turkey (19,000) Albania (14,000) and Croatia (13,000). 9,000 visitors came from Germany in 2010. The United States of America supplied 7,000 visitors. Numbers from other countries in 2010 were all very small (less than 6,000 visitors in each case).

Total visitor expenditure is also showing good growth, as illustrated in table 5.



Ohrid is still the most popular destination for tourists from abroad  
photo: Lj. Stefanov

	2006	2007	2008	2009	2010
<b>Expenditure (US\$ millions)</b>	156	219	262	232	209

**Table 5.** National visitor expenditure 2006-2010  
Source: UNWTO

Average length of stay has decreased in commercial accommodation, from 2.3 nights in 2007/9 to 2 nights in 2010.

## 2.3.3 Greece

Tourism to Greece vastly exceeds tourism to its neighbouring Balkan states. In 2010 Greece received 15 million overnight visitors, compared to 262,000 overnight visitors (5 million arrivals) to the former Yugoslav Republic of Macedonia and 2.3 million overnight visitors to Albania. However international tourism to Greece is not increasing at present, following an all-time record year in 2007 (16,165,000 visitors). Table 6 illustrates Greece's impressive tourism performance.

**Table 6.** Greece tourism arrivals 2006-2010  
Source: UNWTO

	2006	2007	2008	2009	2010
<b>Arrivals (thousands)</b>					
<b>Total</b>	17,284	n/a	n/a	n/a	n/a
Overnight visitors (tourists)	16,039	16,165	15,939	14,915	15,006
Same-day visitors	1,245	.n/a.	.n/a.	.n/a.	.n/a.
<b>Arrivals by region (thousands)</b>					
<b>Total</b>	16,039	16,165	15,939	14,915	15,006
Africa	30	46	44	26	28
Americas	513	843	849	729	691
East Asia and the Pacific	316	230	218	206	199
Europe	15,104	14,988	14,767	13,884	14,034
Middle East	71	46	48	56	45
South Asia	5	1	1	2	9
Other not classified	..	11	12	12	..

A massive 93.5 percent of overnight visitors to Greece come from Europe. Its five top markets for overnight visitors in 2010 were Germany (1,137,000), the United Kingdom of Great Britain and Northern Ireland (1,067,000), France (749,000), Italy (601,000) and the United States of America (588,000). In 2011 political instability in Greece has had a negative effect on tourism, particularly to Athens.

Total tourism expenditure in Greece declined significantly in 2010, as illustrated in table 7.

**Table 7.** Greece visitor expenditure 2006-2010  
Source: UNWTO

	2006	2007	2008	2009	2010
<b>Expenditure (US\$ millions)</b>	14,495	15,687	17,586	14,796	12,579

Average length of stay for international visitors has declined slightly from 5.6 in 2006 to 5.32 in 2009.

Domestic tourism plays a very important part in the Greek tourism economy. Figures for domestic tourism are also impressive: in 2009 Greece had almost 13 million overnight domestic visitors, providing over 19 million overnights in commercial accommodation, as shown in table 8.

Average length of stay for domestic visitors in Greece is shorter than for international visitors: 2.57 nights in 2009. This is a good increase on



# 2 Assessment of tourism demand

2006, which was 2.37 nights. The great importance of road transport for domestic tourism is also noted.

While figures for 2011 are not available indications are that the Greek economic crisis has had a significant negative effect on destinations dependent on Greek domestic tourism, such as Micro Prespa.

	2006	2007	2008	2009
<b>Overnight trips by main purpose (thousands)</b>				
<b>Total</b>	15,884	14,568	12,905	..
Personal (holidays, leisure and recreation)	14,846	13,563	12,295	..
Business and professional	1,038	1,005	610	..
<b>Trips by mode of transport (thousands)</b>				
<b>Total</b>	15,884	14,568	12,905	..
Air	590	539	401	..
Water	2,855	2,427	1,850	..
Land	12,439	11,602	10,654	..
* railway	287	235	227	..
* road	12,052	11,324	10,362	..
* others	100	43	65	..
<b>Trips by form of organization (thousands)</b>				
<b>Total</b>	15,884	14,568	12,905	..
Package tour	289	347	351	..
Other forms	15,595	14,221	12,554	..
<b>Accommodation</b>				
Guests	6,234	7,084	7,127	7,524
Overnights	14,741	17,339	17,651	19,345

**Table 8.** Greek domestic tourism 2006-2009  
Source: UNWTO

*The Greek economic crisis has had a significant negative effect on destinations dependent on Greek domestic tourism, such as Micro Prespa*

*photo: Lj. Stefanov*



## 2.4 Local tourism performance

### 2.4.1 Albania



*There are 11 restaurants in the Albanian part of Prespa, which mainly attract the local population  
photo: Lj. Stefanov*

Most tourist traffic from Korçë to the former Yugoslav Republic of Macedonia and to Greece (and vice versa) bypasses the Prespa Lakes basin altogether. Tourists are generally traveling to main tourism centres in each country by the shortest or most convenient route. Numbers crossing the border north of the Prespa National Park at Stenje are small compared to those traveling via Pogradec.

Tourism in the Prespa National Park area of Albania is reported by Graždani (2008) to be small-scale rural and family tourism, based on a few small hotels, private accommodation and restaurants. Capacities for overnight stays in hotels were 34 beds, for private accommodation 500 beds (sic, possibly 50?) and there were 11 restaurants with 345 seats. The occupancy rate is extremely low, at best 10 percent for the few hotels. Restaurants are reported to have up to 1,000 visitors per day at the weekends during the main summer season, i.e. July and August. The restaurant business therefore has the greatest local economic impact.

### 2.4.2 The former Yugoslav Republic of Macedonia



*There are several restaurants and coffee shops in Resen  
photo: Lj. Stefanov*

The tourism industry in the Prespa region of the former Yugoslav Republic of Macedonia is also very small and seasonal at present, with only one hotel remaining operational on the lake shore (at Stenje with ten rooms). The area's largest hotels have ceased trading (either closed 'pending redevelopment' or in receivership). There is more hotel accommodation in Resen, mostly serving commercial and visiting friends and relations (VFR) traffic, not leisure tourists. Private rooms, workers' accommodation, auto-camp sites and youth facilities have been included in tourist accommodation supply in various studies, but most of these are operational only in the peak months of July and August and closed through the rest of the year. Guesthouses report low occupancy, at most 15 percent in the most developed community-based tourism village, Brajčino. Compared to Albania (and Greece) there are few lakeside fish restaurants (and fishing is currently banned).

St Paul the Apostle International Airport, Ohrid may emerge as an important potential regional gateway following its privatisation. TAV Airport Holdings took over the operations of this facility in March 2010 for a period of twenty years. The emergence of charter tourism traffic from new markets including Turkey is reported.

The costume museum at Podmočani reports 1,500 visitors per annum and the number of international tourists visiting the lakes for sightseeing and village homestay is unlikely to exceed 3,000. A figure of 20,000 visitors overall is reported by CRPPR and this seems reasonable, including the domestic market<sup>5</sup>.

### 2.4.3 Greece

Greek Prespa has the most developed tourism product in the region and attracts the most visitors. However seasonality is a major challenge and local consultations indicate that there is a lack of coordination, cooperation and joint marketing. The area has seen expansion of its tourism product both in terms of new hotel and guesthouses and new visitor attractions such as the Byzantine Centre and Prespa National Park Centre. Tourism remains highly peaked however resulting in an industry which is constrained both in terms of viability and resources for marketing and upgrading.

### 2.4.4 Market segments attracted

The following market segments currently visit the Prespa Lakes basin (based on consultations undertaken at annex 4 and subsequent research):

#### Albania

- Domestic tourists (mostly for restaurants);
- Ethnic Macedonians (mostly for restaurants);
- Hunters (domestic);
- Some foreign tourists taking boat trips; and
- Some seminars and workshop participants, and other study/work-related visitors, such as archaeologists.

#### The former Yugoslav Republic of Macedonia

- Domestic (mostly from Bitola, Skopje, Prilep), excursions and family trips;
- Foreign (mainly diaspora), above 35 years old guests, one-day weekend visits;
- Dutch tourists using homestay (from new Ohrid charters); and
- Israeli tourists using homestay and seeking value for money.

	2009
Passenger arrivals	36,652
Commercial flights	676
International traffic by country	
Switzerland	40%
Austria	27%
Slovenia	25%
Other	8%

**Table 9.** Key indicators St Paul the Apostle International Airport, Ohrid 2009

Source: TAV Airport Holdings



Private accommodation in Ljubojno  
photo: Lj. Stefanov

<sup>5</sup> 70,000 overnight visitors were suggested in the industry consultation report at annex 4, but this is not physically possible given volumes of rooms and very low reported occupancy.

## Greece

- Domestic tourists from Western Macedonia (day trips)
- Domestic tourists from Central Macedonia and Thessaloniki (day trips or one or two night stays);
- Domestic tourists from all over the Greece (mainly for short breaks, families and small groups (25 to 50 year olds);
- Diaspora people (mainly from Canada, Australia, Germany);
- Foreigner holiday visitors (mainly from Western Europe and Israel);
- Foreign special interest groups (bird-watching, dendrology, hiking, etc.); and
- Students and other volunteers (voluntourism<sup>6</sup>).

## 2.5 Conclusions and key issues arising

Global tourism is showing signs of recovery and the overall situation for destinations that can offer what today's and tomorrow's tourists want (at a price they can afford) is very positive in the long term: There are more and more tourists wishing to visit more and more places. They are increasingly interested in 'green' destinations and seeking escape from busy urban lifestyles.

Tourism in the Western Balkans is at a very early stage of development: Most tourism traffic is inter-regional or diaspora-based, as people in the various former communist countries begin to enjoy greater freedom of movement to explore their own region and further afield. Countries like Albania and the former Yugoslav Republic of Macedonia are also beginning to be discovered by Western European and North American tourists: Visitor numbers are likely to continue to rise. The regional airport at Ohrid offers potential to become a regional tourism gateway, although the Prespa Lakes basin area's ability to benefit from charter traffic is restricted by its limited accommodation base.

The tourism performance of Greece is impressive, both internationally and domestically and it dwarfs that of its Northern neighbours. Greece remains very dependent on Western European markets and the effects of current economic recession and political uncertainty are likely to hit hard in the short term at least. All the countries in the region including Greece have a big challenge in addressing seasonality.

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<sup>6</sup> *Travel to engage in voluntary service and tourism which allows for a reciprocal relationship with communities.*



## 2 Assessment of tourism demand

Tourism in the Prespa Lakes basin remains very much divided into the three different jurisdictions: There is virtually no 'three countries, two lakes' tourism product being sold, making the Prespa Park 'brand' lack credibility for tourism purposes. The closed border at Dolno Dupeni results in a 150km diversion via Florina and Bitola which no tourist or tour group interested in travelling around the Prespa Lakes will undertake. Some tourism operators in Greece may fear an open border due to the possibility of undercutting of accommodation prices, although the big disparity in accommodation standards between Greece and its neighbours makes this unlikely: In fact Greek accommodation could hold people for an extra night if a 'round Prespa Lakes' day tour was on offer.

The Prespa region of Greece is the most successful in terms of tourism product, but there are significant marketing challenges to be faced if market demand, in particular off-season demand, is to be stimulated and new markets found. In the former Yugoslav Republic of Macedonia there is strong evidence of market failure, with closed hotels following the break-up of Yugoslavia and unsuccessful privatisations, and very little current tourism development. Albanian Prespa has not yet been touched by this country's tourism awakening, although it is already evident in Korçë to the South. Inter-regional tourism bypasses the Prespa Lakes basin travelling via Korçë, Ohrid or Bitola.



*The west coast of the lake, with the Galičica mountain in the background  
photo: Lj. Stefanov*

Despite these weaknesses the Prespa Lakes basin could undoubtedly offer a tourism product to meet the needs of a growing market. Its product offer however needs to be based on these needs, as determined through continuous market research, and driven by quality and value for money. Awareness needs to be created and new market-led product developed.



photo: Lj. Stefanov

## 3. Assessment of tourism sustainability and Impacts on cultural and natural heritage

### 3.1 Sustainability of tourism in the Prespa Lakes basin

Sustainable Tourism is tourism that strives to minimize its impact on the environment, to respect local people and cultures, to offer economic benefit to local businesses and communities, and to provide a memorable experience for travellers and (especially) protects destinations for future generations.

UNWTO points out that the principles of sustainable tourism and of Agenda 21 should be applied to all types of tourism development:

*Sustainable tourism development guidelines and management practices are applicable to all forms of tourism in all types of destinations, including mass tourism and the various niche tourism segments. Sustainability principles refer to the environmental, economic and socio-cultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability.*

<http://www.unwto.org/sdt/mission/en/mission.php>

To examine the extent to which tourism is sustainable in the Prespa Lakes basin it is necessary to look at the following four key areas identified by UNWTO:

*1) Does tourism in the Prespa Lakes basin make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity?*

With management plans in place or in the process of preparation, and current efforts to repair the lakes' ecosystems, this criterion can be met.

*2) Does tourism in the Prespa Lakes basin respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance?*

This criterion is also being met, particularly in Greek Prespa where much effort has gone into architectural conservation of vernacular buildings.

*3) Does tourism ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation.*

This criterion is not being met at present, particularly in Albania and the former Yugoslav Republic of Macedonia. There is however potential for it to be met if capacities for responsible tourism development can be enhanced.

*4) Sustainable tourism development requires the informed participation of all relevant stakeholders, as well as strong political leadership to ensure wide participation and consensus building. Achieving sustainable tourism is a continuous process and it requires constant monitoring of impacts, introducing the necessary preventive and/or corrective measures whenever necessary.*

This criterion is not being met at present, although improvements can be made through the PPMC to address this.

*5) Sustainable tourism should also maintain a high level of tourist satisfaction and ensure a meaningful experience to the tourists, raising their awareness about sustainability issues and promoting sustainable tourism practices amongst them.*

There is insufficient market research available at present to judge visitor satisfaction with the Prespa Lakes basin's product and awareness-building efforts regarding sustainable tourism practices. This is also something which the PPMC can address.



## 3.2 Carrying capacity

The issue of tourism carrying capacity is referred to in important planning documents such as the Ohrid-Prespa Spatial Plan (Ministry of Environment and Physical Planning, 2010) and was a concern mentioned in consultations. In national park planning 'carrying capacity' was originally taken to mean the number of visitors to an area which can be accommodated without degradation of the biophysical quality of the area. In social terms it was taken to mean the number of visitors which can be accommodated without overwhelming the local population, with Venice often referred to as a negative example. These definitions have evolved however and a less simplistic view is now taken by planners, generally involving the concept of 'limits of acceptable change' which recognises that 'carrying capacity' changes and evolves over time depending on facilities and services provided, and in fact is not fixed. More sophisticated indicators are now used to examine 'carrying capacity', recognising that it is relative to the following factors which require management:

*Rural landscape in the Albanian part of Prespa  
with a view to the Island of Mali Grad  
photo: G. Schwaderer*



- Biophysical characteristics (often protected through zoning)
- Visitor behaviour (addressed through education and communication);
- Historic levels of use and trend data;
- The type of development allowed;
- The efficiency of facilities provided;
- Seasonality of use; and
- Management approaches.

A variety of visitor management systems exist for national parks and tourism destinations, all with clever acronyms and requiring big research budgets. These include the Limits of Acceptable Change system (LACS); the Tourism Optimization Management Model (TOMM), Visitor Impact Management (VIM), the Visitor Experience and Resource Protection process (VERP) and Visitor Activity Management Planning (VAMP). The Prespa Lakes basin's problems are however more to do with agricultural pollution, the loss of traditional tourists and a failure to attract new ones, rather than visitor management and carrying capacity concerns at present. It is important to remember that the Lake District National Park in the



# 3 Assessment of tourism sustainability and impacts on cultural and natural heritage

United Kingdom of Great Britain and Northern Ireland covers just 2,292 sq km and absorbs 15.8 million visitors a year in a very strictly controlled and well managed rural landscape<sup>7</sup>.

## 3.3 Impacts on cultural and natural heritage

Because tourism volumes are very low, except in July and August at specific locations (mostly in Greek Prespa) the impacts of tourism on cultural and natural heritage within the Prespa watershed are not particularly severe. Compared to agriculture its environmental impact is minimal. However there have been occasional incidents of vandalism, damage to plants and monuments. General wear and tear is obvious and requires that better management systems to be put in place. With the predicted increase in tourism to the Western Balkans generally, and the Greek desire to emphasise tourism development away from the coast, robust visitor management systems will be needed as tourist numbers grow: They are essential for responsible tourism. Two particular visitor management approaches are recommended to the PPMC.



*St. Peter's Church dating from 14th century on the Island of Golem Grad  
photo: Lj. Stefanov*

<sup>7</sup> < <http://www.lakedistrict.gov.uk/learning/helpwithprojects/factstourism/factstourismeconomy> >

### 3.3.1 Recommended system for natural heritage management



*Little white egret, one of the bird lovers' favorite*  
photo: Lj. Stefanov

Systems for natural heritage management are already quite well developed through the area's four national parks which have, or are in the process of developing, management plans. It is recommended that these parks and the surrounding lands within the basin are brought together as a trans-boundary Biosphere under UNESCO's MAB programme. This will allow not just for the consideration of natural heritage needs, but also for planning the socio-economic needs of the local populations as part of the biosphere. Systems and processes for trans-boundary biospheres including multiple national parks and other landscape designations are already well developed, and can be applied to the Prespa Lakes basin to strengthen nature protection and sustainable economic development. Green funding mechanisms may also be accessed.

The establishment of a trilateral UNESCO Biosphere Reserve around the Prespa Lakes basin has been the subject of a recent regional conference organized by the Ministry of Environment and Physical Planning of the former Yugoslav Republic of Macedonia in cooperation with UNESCO, UNDP, the Kreditanstalt für Wiederaufbau (KfW) banking group and Galičica National Park, and with the involvement of prospective members of the tri-lateral PPMC. It was agreed at the conference that the relevant ministries for environment of the three countries would proceed with the procedure for designation of the Prespa Lakes basin as Biosphere reserve. This initiative is highly relevant to future sustainable tourism development, and is seen as the recommended means and form through which the PMCC should operate in terms of sustainable tourism development and marketing policy.



*The Golem Grad Island*  
photo: Lj. Stefanov

# 3 Assessment of tourism sustainability and impacts on cultural and natural heritage

## 3.3.2 Recommended system for cultural heritage management

International visitor management systems exist which can be adapted to the Prespa Lakes basin's needs. In relation to cultural heritage, the fact that Prespa has been nominated by Greece as a candidate World Heritage Site for both nature and culture provides an obvious and very desirable means of putting in place and implementing a heritage management plan, because a detailed management plan is required to achieve full World Heritage List inscription. It is recommended that the PPMC consider supporting this inscription process on a cross-border basis as a priority for future sustainable tourism development and funding in the Prespa Lakes basin, and to raise the profile of the area as a tourism destination.



*Cave churches and frescos can be found in the most remote areas*  
photo: Lj. Stefanov



*Remains of settlements in the island of Golem Grad*  
photo: Lj. Stefanov

## 3.4 Conclusions and recommendations

Tourism in the Prespa Lakes basin is a long way from reaching its 'carrying capacity' however it does not yet take sufficient account of its current and future economic, social and environmental impacts, and of addressing the needs of visitors, the industry, the environment and host communities. The basis for a sustainable and responsible tourism industry clearly exists however, if management capacity can be enhanced. It is recommended that this process of strengthening sustainability and management capacities for tourism be taken forward through the application process for full World Heritage Site enlisting, and the establishment of an international trans-boundary Biosphere Reserve covering the entire Prespa Lakes basin.

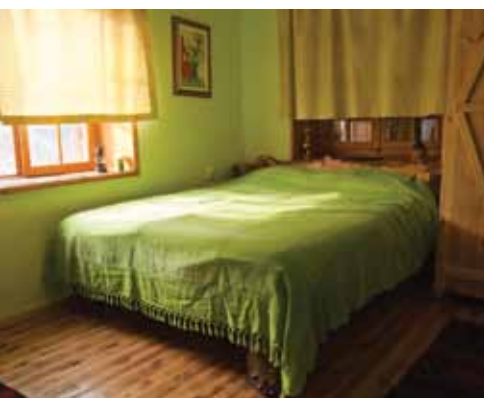




photo: Lj. Stefanov

## 4. Vision for tourism development

Private accommodation in Brajcino  
photo: Lj. Stefanov



### 4.1 Vision statement

The Prespa Lakes basin will be developed as a model of sustainable and responsible tourism development, building on its superb natural and cultural features. It will have high quality attractions and activities for both domestic and international visitors in a stunning landscape protected by National Parks. It will continue to develop as a model of cross-border cooperation to the economic and socio-cultural benefit of its inhabitants. It will be managed as a trans-boundary Biosphere Reserve and achieve World Heritage Site enlisting.

## 4.2 Main product themes

The main product themes which Prespa Lakes basin will in future offer to meet growing market needs are as follows:

- Ecotourism

Ecotourism and community-based tourism (CBT) is the main product on offer at present in the region. Tourism development is largely village-based and small scale with a strong educational and environmental angle. This will be delivered through National Park improvements and quality accommodation. It will be better marketed, especially off-season.

- Nature (including bird-watching)

With a superb legacy of protected landscapes and magnificent unspoilt scenery protected in National Parks, the nature product will be built upon for future sustainable tourism development and better interpretation. It will appeal to both broad markets and special interest markets. National Parks will continue to be upgraded and new flagship products put in place.

- Culture

The area has extremely rich cultural assets, especially ecclesiastical but also in its vernacular architecture, ethnography and modern cultural life. The market for cultural tourism is broad and large, with special interest opportunities. World Heritage Site listing will be actively progressed on a trans-boundary basis And form the development framework for cultural tourism.

- Activity tourism

Activity tourism is beginning to be developed by the area's National Parks. Appealing to younger and more active markets, this is a new area which the Prespa Lakes basin will strongly target as further product development and local tour operators develop.

- Resorts, spas and wellness

This is not a developed product at present, although there is a hotel with a spa near Agios Yermanos and a possible heath tourism development on the Western shore of Macro Prespa. It will be encouraged an area of potential for future private sector investors (and currently closed hotels). All future developments will be the subject of robust environmental impact assessments (EIAs) and clear zoning and planning guidelines will be developed for the buffer zones surrounding the area's National Parks.



*Bird watch tower in the vicinity of Stenje, National Park Galicica  
photo: Lj. Stefanov*



*St. Atansius church  
photo: Lj. Stefanov*





## 5. Tourism development strategy

### 5.1 Flagship products

High quality tourist attractions and facilities are needed to put Prespa ‘on the map’ in terms of international tourism awareness and to drive up occupancies. Some flagship products already exist, in particular National Parks, and good products have already been developed, such as at in Agios Germanos village and Agios Achillios island in Greece, and the bird-watching experience available, and resorts like the Mimallones Hotel. Eco-based community tourism is also a success story, although occupancy is weak because the market for homestay specifically is quite small. Attempts at replicating and expanding this product have not been very successful, despite support programmes. In general there is a shortage of superb quality, high profile visitor attractions and accommodation in the Prespa Lakes basin to complement the stunningly beautiful landscape. New product is needed that will attract new markets and recapture old ones. There are also very few trans-boundary products.

If a serious commitment to develop tourism in the Prespa Lakes basin exists, real investment is required. More attractions and quality facilities need to be developed in a sensitive way that will attract more people to visit the area and spend time in it, and encourage more quality accommodation development. Given the present situation of fairly weak market demand and (in particular) low occupancy<sup>8</sup>, major commercial private sector investment is unlikely, unless motivated by altruistic

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<sup>8</sup> Occupancies in excess of 70% are generally needed to attract commercial hotel investment. Some investors can of course bring their own market with them.

reasons (such as returning emigrant investment). Intervention is required to stimulate demand, not just in marketing, but also in product development.

The present ecotourism product is based around national parks, homestay accommodation, guesthouses and small hotels. It needs to be developed by making it more bookable and marketed. Quality needs to be improved. Networking between businesses needs to be facilitated. Strengthening on-line capacity and visitor information systems is essential. Further training is needed both in information technology (IT) skills and small business marketing, and in international expectations of quality standards.

A series of flagship tourism development projects is recommended that will reinforce key product strengths of the Prespa Lakes basin (nature, culture, ecotourism) and address gaps in its current offer. Transboundary projects are outlined in the Action Plan, and the reopening of the Dolno Dupeni border crossing is a key need. Flagships projects to drive tourism will mostly be public sector or grant aided projects, although there will be opportunities for private-public partnership (PPP) and non-governmental organisations (NGOs) also. They will take at least five years to deliver as funding must be sought, EIAs undertaken and careful design and project management initiated. Unless significant interventions are made, the current pattern of seasonality, regional marginalization and rural decline is likely to continue.

Flagship projects are designed with trans-boundary elements in most cases, which will help to attract international funding and help to extend length of stay in the three countries. Albania is however seen as needing to first address basic issues such as solid waste management before tourism can really develop, although some initiatives are possible here also. The conservation expertise of Greek Prespa is seen as important.

Without flagship interventions it will be difficult to attract new private sector investment in better and upgraded accommodation, and difficult to attract external tour operator and travel press interest.

In seeking to deliver these projects it is recognised that there are significant capacity weaknesses in the region, and for this reason delivering enhanced capacity development support for the tourism sector is a fundamental part of this strategy. Capacity development will be aimed at both the public and private sectors, with particular emphasis on responsible tourism policy, project management, SME development, IT and marketing skills.

Given the geographic location of the Prespa Lakes basin and its environmental importance, there is a significant opportunity to attract funding for these flagship projects, subject to more detailed market research, feasibility analysis and EIAs in each case. Previous small scale funding of tourism support programmes in the region has had limited impact: A bigger vision is required.



photo: Lj. Stefanov

## 6. The Role of the Prespa Park Management Committee



## 6.1 Opportunities and constraints

The PPMC is an ideal vehicle for taking forward the establishment of a Prespa Park Biosphere Reserve, as it includes both environmental and local community interests. It should also play a strong role in seeking funding for the flagship projects tourism projects recommended in this strategy, and ensuring their quality delivery and quality delivery of training.

PPMC, being made up mostly of government bodies (including national parks) has an obvious strategic guiding role. In this strategic role, commissioning market research and feasibility studies for flagship projects can also be usefully undertaken. PPMC also should have a strong monitoring role. In terms of tourism marketing however, PPMC has significant limitations. This is because of the following realities:

- tourism is a private sector-driven service industry;
- tourism falls under the primary day-to-day supervisory responsibility of other government departments not represented on PPMC; and
- an organisation which meets at a high level only twice a year will not be able run marketing campaigns.

These issues are discussed further in the next chapter.

## 6.2 Way forward

The role of PPMC is therefore seen as leading in the following areas which are in accordance with the Joint Statement of February 2010:

- The establishment of the Prespa Park Biosphere to ensure both environmental protection and the enhancement of economic livelihoods;
- Accessing funding for strategic trans-boundary projects, such as the flagship projects outlined in this strategy;
- Supervising their delivery with effective cross-border elements;
- Commissioning strategic research;
- Publishing information on water quality and tourism performance;
- Monitoring of progress and cross-border cooperation.



## 7. Marketing the Trilateral Prespa Park

### 7.1 Current marketing needs

Marketing is clearly an area of weakness in all three parts of the Prespa Lakes basin. The lakes are peripheral to each country's marketing campaigns and despite many donor projects there remains evidence of a lack of communication and a lack of coordinated effort, at national as well as trans-boundary levels. Greek Prespa in particular is suffering due to the downturn in the Greek domestic economy and has as yet no structured means of trying to address this in a coordinated way.

With relatively easy access from Ohrid and Thessaloniki international airports there is a real opportunity for tourism, and in particular transboundary tourism to grow. However the profile of the area needs to be raised considerably. Local tour operator businesses need to be developed to facilitate inbound tourism via international operators, packaging local accommodation suppliers and attractions. This is not a role government can play.

To make a sale in tourism it is widely recognised that destinations must go through the following process:

Attention (build awareness) → Create interest in visiting → Secure a desire to visit → Stimulate action

In tourism, this process can take many years and needs to be sustained, as people tend to have fairly long lists of places they are aware of and would like to visit in their minds. Constant reminders are needed of possible places to visit. There are no 'quick solutions' to tourism marketing.

Thus the first marketing challenge that needs to be addressed is to create awareness of the Prespa lakes basin as a potential holiday destination. This implies the need for a sustained public relations (PR) campaign focusing on new products as they emerge in the three countries. It needs to be professionally planned and delivered, and although better value than direct advertising, a professional PR campaign is not cheap to deliver effectively.

Secondly there is a big credibility problem in terms of the Prespa Lakes basin as a trans-boundary tourism product: Unless the border at Dolno Dupeni can be reopened the ability of accommodation operators to maximise the potential of holding visitors in the area longer is very severely constrained, because they cannot drive around the lack and will not come back to the same place after a day's touring. Without better through access Greek Prespa may be bypassed as a touring route from Thessaloniki and Ohrid and vice-versa develops. Only when this border-crossing is reopened can the full tourism potential of the trilateral region be realised.

Thirdly the issue of seasonality must be addressed: Activities which attract people when the accommodation sector has capacity (in terms of high quality rooms) available must be promoted.

Finally the areas of tour operator services, on-line information presence and the 'bookability' of the whole area need to be addressed. There are insufficient tour operators promoting the Prespa Lakes. Most accommodation bookings now come through the internet and all parts of the Prespa Lakes basin are difficult to find on-line.

## 7.2 Scale and sustainability

With less than 600 rooms available in the Prespa Lakes basin at present, the area is not a viable unit to be effectively marketed on in isolation. It lacks critical mass and credibility, and as a result marketing will be seriously under-funded and probably unsustainable without continuous external support. It will be more effective for Prespa Park to align itself with relevant large scale marketing campaigns and work to maximize its exposure through them, and use whatever marketing funds it can attract in a very targeted way through these initiatives, requiring other, bigger campaigns to do specific things in return for the PPMC's contributions.

The National Parks probably have the strongest tourism capacity, but destination marketing is not their primary objective. The private sector is tiny and local tour operators are few and small also. It is therefore

recommended that marketing funds should be secured, but expended through partnership with organisations which already have tourism marketing capacity. Examples of existing or developing organisations with existing marketing budgets that can be supported and incentivized to raise the profile of Prespa Lakes basin include the following:

- Albanian National Tourism Agency;
- Agency for Tourism Promotion, the former Yugoslav Republic of Macedonia;
- Greek Tourism Organisation;
- Korçë DMO;
- Pelagonija region, and
- the Ohrid-Prespa Euroregion.

In the long term this latter region may offer the most logical and attractive 'pull' factor' for regional marketing with a critical mass of accommodation and attractions, and access to EU finance.

## 7.3 Examples of trans-boundary tourism marketing

The initiatives that follow, initiated by destinations all around the world, show that when it comes to tourism targeted marketing for increased destination awareness, two or more can be better than one:

- Showing that ancient enemies can work together for tourism, in 2011 the China National Tourism Office and Korean Tourism Organization launched a joint consumer travel marketing campaign aimed at the United States of America. The campaign is built around a website <[www.visitchinaandkorea.com](http://www.visitchinaandkorea.com)> featuring vacation packages to both China and Korea. The website is being promoted through an extensive campaign of both banner and search engine advertising. The objective of the joint marketing campaign is to raise awareness of travel to China and Korea, as well as to promote outbound travel bookings to China and Korea by driving traffic to tour packages featuring both countries. The campaign began in September and will run through December. The new website features a range of itineraries from experienced tour operators.
- CANTATA2 is a 2.2. million euro tourism development project funded through the INTERREG IV B Atlantic Area Programme and working along the Western Atlantic fringe of Europe (Denbighshire in North Wales in the UK; Shannon, on the West Coast of Ireland; Galicia, in North West Spain; Poher, in Brittany, France and Montemor-o-Velho, in Western Portugal) it promotes alternative tourism and aims to move visitors from the 'hot spots' to more peripheral and under-developed areas and to deliver authentic and genuine visitor experiences, thus promoting and strengthening local distinctiveness.

<<http://www.cantata.eu.com/>>



CANTATA2 is the second phase of this project, following a successful phase one that ran from 2005 to 2008. In phase one, the project carried out research studies and made connections with the local tourism trade to get to know the local businesses and their problems. It also worked with the trade to help promote the local distinctiveness as well as providing opportunities for SME's and microbusinesses to network and undertake skills training designed specifically for them. The programme is focussed on the private sector. It capitalises on the knowledge gleaned from phase one and develop the ideas into tangible results. Business networks will be strengthened and more ownership by the local trade will be developed. Results will also include actual tourism products to attract and retain visitors, such as food trails, e-tourism products and trails, cultural events, marketing campaigns. New, innovative technology and marketing methods will be explored and utilised and the skills needed will be passed on to the trade.

- The Shannon-Erne Waterway was developed in 1988-1992 to physically connect Northern Ireland and the Republic of Ireland as part of the Anglo-Irish peace process. Utilising funding secured from the EU and the International Fund for Ireland a one million euro marketing campaign for the waterway was expended through the two national tourist boards of Ireland and Northern Ireland. Funding was earmarked for press visits to the region and tour operator familiarisations to visit and experience the area and its developing tourism product. A jointly owned company was set up to manage the funds and supervise the execution of the campaigns. Following the successful launch of the campaigns to get tourism up-and-running in the trans-boundary area the company was wound up and responsibility for marketing reverted to regional authorities.

This last example might be a useful precedent: Rather than trying to develop Prespa's own 'stand alone' campaign which would be very expensive to administer and unlikely to be sustained with so small an industry to fund it, it will be more effective to incentivize other organisations to feature Prespa Lakes basin more prominently.

## 7.4 Marketing objectives for Prespa Park

The following marketing objectives are therefore recommended:

- *To create awareness of the Prespa Lakes basin as a superb location for eco-tourism, nature, culture and activities through partnering with national tourist board and other regional and domestic marketing initiatives.*
- *To promote trans-boundary tourism which extends length of stay in the region by marketing specific trans-boundary products (as they are developed).*
- *To promote off-season products and events in the Prespa Lakes basin.*
- *To make holidays in the Prespa Lakes basin easier to book.*

## 7.5 Delivery of marketing

As indicated above the PPMC is not considered an appropriate organisation itself to undertake tourism marketing. It is therefore recommended that a Marketing Committee be empowered to advise on marketing expenditure with the future trilateral park executive, guided by leading private sector interests, especially local tour operators, as well as the National Parks and the TIC Network.

The Marketing Committee would make recommendations to the PPMC (or other funding agencies) as to how and where tourism marketing resources should be spent to fill accommodation occupancy and attract more visitors to the trilateral region. Trans-boundary activity should be given priority. Joint campaigns clearly featuring the Prespa Lakes basin would then be negotiated with marketing partners and funded with results being monitored.

## 7.6 Target markets

Given the realities of tourism demand in the Western Balkans and Greece, focus needs to be on the following priority areas:

- *Domestic markets, paying attention to new, younger activity tourism segments.*
- *Neighbouring countries.*
- *Destinations and international charter operators with flights to Ohrid and Thessaloniki airports, including partnership with inbound tour operators.*
- *Special interest travellers, in particular birdwatchers and cultural heritage specialists who are likely to be including the Prespa lakes basin as part of a tour covering other regional destinations (regional markets and the United Kingdom of Great Britain and Northern Ireland, Germany and France).*

Campaigns must be driven by market research about inbound and domestic tourist needs and wants, and obtaining this must be a priority for PPMC. Further detail as to how marketing can be taken forward is contained in Section II – Action Plan.

## 7.7 Targets for marketing strategy

At present tourism demand is very low, especially in terms of overnight tourism. Excursionists (day visitors) are also in decline. Tourism is probably at a low ebb at the moment and unlikely to decline further, but strong growth is unlikely to occur unless there is very significant investment in product development and marketing, and round-Prespa touring is facilitated. The following scenarios are therefore suggested in table 10, and are in accordance with the marketing strategy targets (assuming product development) which seeks an overall 20 percent growth in overnight visitors:

	2011	2012	2013	2014	2015
<b>Do nothing<sup>10</sup></b>					
Albania	3,276 <sup>11</sup>	3,604	3,964	4,360	4,796
The former Yugoslav Republic of Macedonia	14,600 <sup>12</sup>	16,060	17,666	19,433	21,376
Greece	23,652 <sup>13</sup>	23,652	23,652	23,652	23,652
<b>Marketing, training and flagship product development</b>					
Albania	3,276	4,457	5,638	6,819	8,000
The former Yugoslav Republic of Macedonia	14,600	21,650	28,700	32,350	36,000
Greece	23,652	27,739	31,826	35,913	40,000

**Table 10.** Tourism growth projections (number of tourists<sup>9</sup>)

The marketing strategy also targets increased length of stay. If round-Prespa touring can be facilitated average length of stay could be increased by one day, which would result in a substantial improvement in occupancy and economic contribution in all three countries.

<sup>9</sup> The UNWTO definition of a tourist is someone who stays away from his or her normal place of work for more than 24 hours (i.e. an overnight visitor).

<sup>10</sup> Growth assumptions: In a 'do nothing' scenario tourism to Albania the former Yugoslav Republic of Macedonia will grow at 10 percent due to the current popularity of the destinations.

<sup>11</sup> Based on 10% room occupancy, 1.2 person per room.

<sup>12</sup> Using the Municipality of Resen figure of 12,227 rooms sold in 2010 and assuming 1.2 persons per room.

<sup>13</sup> Assumes 20% overall occupancy of current Greek Prespa accommodation base.



*photo: Lj. Stefanov*





## Part II Action Plan



photo: Lj. Stefanov

## 8. Tourism action plan

### 8.1 Management

#### Action 1.1: Put in place an effective and well resourced executive for the trilateral Prespa Park's tourism functions

Without an active and committed executive for the Prespa Lakes basin as a tourism destination, little sustainable progress will be achieved. Reviving Prespa basin as a tourism destination is very challenging, and the scale and effectiveness of the executive function in tourism will largely be dependent on what finance and technical support can be raised both for a project executive and for implementing this strategy.

As a minimum to implement the tourism strategy the PMCC needs the following:

- An overall Park Director to be in place (primarily responsible for overall environmental issues) but who will be the chief advocate of tri-state cooperation, raising finance from donors and ensuring responsible tourism development which supports the environment. This person should be an inspiring leader;
- A Product Development and Training Manager, experienced in project cycle management and quality issues.



- A Marketing and Communications Manager, experienced in tourism, with responsibility for negotiating the marketing and communications strategies; and
- Support staff.

A long term (one year +) international tourism expert with relevant regional experience is also recommended to provide capacity development support to the PPMC secretariat.

These posts should be housed in a functioning office located in the region and appropriately resourced. Provision should also be made for buying in other technical expertise to assist the Director delivering technical issues.

It will be important for the Prespa Park to have a different and specifically defined role from other statutory organisations (regional organizations, municipalities, national parks, etc.) engaged in tourism. It is therefore recommended that the PPMC executive focus on the following the following strategic areas:

- Securing funding for flagship developments in the trilateral Prespa Lakes basin (this is a critical aspect which will effectively determine which flagship projects go ahead in which countries);
- Assisting successful delivery of flagship projects;
- Trans-boundary tourism initiatives;
- Strategic market research to guide development and marketing;
- Negotiating joint marketing proposals to raise the profile of Prespa Lakes basin; and
- Capacity development support.

It should not become engaged in day-to-day tourism issues which are the responsibility of other organisations.

**Target: Up and running Park executive including responsibility for tourism within six months.**

*A view to the Prespa Lake from Pelister  
photo: Lj. Stefanov*



## 8.2 Flagship projects – ecotourism

### Action 2.1: Prespa Trans-boundary Biosphere Reserve

A practical overall framework for sustainable development needs to be put in place in the Prespa Lakes basin area, incorporating the entire area (its population centres, nature reserves and agricultural lands as well as the lakes and rivers themselves). This development framework needs to be flexible to human needs as well as those of nature. It needs to build on existing structures, not compete with them. It needs to be simple to implement, and avail of existing international trans-boundary support mechanisms. It is recommended that this be done through the process of Prespa Lakes basin achieving designation as a biosphere reserve.



*Stenje to Konjsko - one of the best sights of Prespa  
photo: Lj. Stefanov*

Biosphere reserves are sites established by countries and recognized under UNESCO's MAB Programme to promote sustainable development based on local community efforts and sound science. Protection is granted not only to the flora and fauna of the protected region, but also to the human communities who inhabit these regions, and their ways of life. Working towards the designation of the Prespa Lakes basin a trans-boundary biosphere reserve would give the future development of the area a structured approach to tourism development planning, and draw on United Nations support mechanisms under the Convention on Biological Diversity<sup>14</sup>, as well as support from UNESCO and other agencies. It would provide an opportunity for structured engagement in regular exchanges of good practice with other tourism-orientated biosphere reserves and provide capacity development opportunities for existing protected area staff and institutions.

There are three minimum criteria for areas joining the MAB programme as follows:

- identify three zones (core area, buffer zone, transition zone);
- provide at least these three functions (protection, research, development); and
- conduct regular (10 year) evaluations to review the state of the biosphere reserve.

<sup>14</sup> Albania and Greece became parties to the convention in 2004, and the former Yugoslav Republic of Macedonia in 1997 < <http://www.cbd.int/convention/parties/list/> >



Biosphere reserves fulfill three inter-connected functions all of which are key to the Prespa Lakes basin's needs:

- Conservation: landscapes, ecosystems, species and genetic variation;
- Development: socio-economic and culturally-adapted; and
- Logistic support: research, monitoring, environmental education and training.

The Prespa Lakes basin is probably already meeting these criteria through its protected area designations and the UNDP GEF programme. Biosphere reserves are also sites of excellence where new and optimal practices to manage nature and human activities are tested and demonstrated: Prespa Lakes basin is already a recognised example (see: Prespa Lakes: Where Green Diplomacy Works, Ivanoski, 2011).

Biospheres can protect larger areas of natural habitat than a National Parks or Strict Nature Reserves, and can include one or more National Parks and/or preserves within them, along with buffer zones that are open to broader economic uses. Working towards a biosphere designation would engage and strengthen existing national parks, reserves and other institutions, a key project aim.

After their designation, biosphere reserves remain under national sovereign jurisdiction, yet they share their experience and ideas nationally, regionally and internationally within the World Network of Biosphere Reserves (WNBR). Twelve biosphere reserves are also Ramsar sites<sup>15</sup>. Currently there are no biosphere reserves in Albania or Macedonia and only two in Greece (the Gorge of Samaria and Mount Olympus).

Current moves by the ministries of the environment off the three trilateral states to create a trans-boundary biosphere should be strongly supported. Not only will the process raise the profile of the Prespa Lakes basin and provide access to MAB and other green funding programmes, but it will put in place a management system and stakeholder consultative process that will greatly strengthen trans-boundary processes, and strengthen the constituent national parks.

MAB has accumulated more than 30 years of experience and is operating in over 100 countries with the objective of promoting interdisciplinary research, training, and communication in the field of ecosystem conservation and the rational use of natural resources. Enhanced relationships between people and their environment globally is one of the key objectives of the MAB Programme. Biosphere Reserves represent

*Pelicans*  
photo: Lj. Stefanov



*Pelister forest*  
photo: Lj. Stefanov



<sup>15</sup> <[http://www.unesco.org/mab/doc/brs/brs\\_ramsar.pdf](http://www.unesco.org/mab/doc/brs/brs_ramsar.pdf)>

a wide range of the world's major ecosystems, many of which are trans-boundary.

It is recommended that PPMC adopt UNESCO Biosphere planning and management processes as its primary strategic principle for managing sustainable tourism development in the Prespa Lakes basin. Priority should be given to supporting responsible tourism projects put forward by National Parks.

The cost of establishing a trans-boundary biosphere reserve is currently being studied by another project.

**Target: Achieve Biosphere Designation for Prespa Lakes basin within three years.**

## Action 2.2: Prespa Tourist Information Centre Network

The Prespa Lakes basin's tourist information network emerges as an interesting area of strength which can be built upon in a way which, being already embedded in communities, is likely to be sustainable – unlike many previous donor initiatives in tourism. It can also be built upon as a trans-boundary initiative. The following TICs are either operating or planned around the Prespa Lakes basin:

### Albania

- Planned National Park and KfW TICs on the Korçë- Stenje cross-border route; and
- Zagradec Information Centre operated by the Woman Society
- Micro Prespa and supported by SPP.

### The former Yugoslav Republic of Macedonia

- National Park TIC at Stenje (soon to open);
- Proposed TIC in Resen (Resen Municipality with national tourism authorities);
- Proposed National Park information centre near Ljubojno; and
- Community TIC in Brajčino.

### Greece

- Prespa Park TIC near Lemos;
- SPP centre in Agios Germanos;
- CTP centre in Lemos library;
- National Park centre near Pyli; and
- TIC in Vrondero (currently closed).



Information Center in National Park Prespa in Gorica  
photo: Lj. Stefanov



Information Center in National Park Pelister  
photo: Lj. Stefanov



The network should not be expanded further (it will be difficult to financially sustain so many TICs) but much could be gained by focusing training, development and marketing roles through developing a flagship, top quality Prespa Tourist Information Centre Network. Also, as more and more tourists rely on the Internet for tourist information, the TIC service (and the private sector) need to be facilitated to go ‘on line’.

The programme to deliver this will include the following:

- Continuous training programmes regarding aspects of the trilateral park, customer care, IT, and sales and marketing, to be delivered to TIC staff, National Park staff, municipality tourism officers and others (in local languages).
- Development of a common code of standards for delivering excellence in TICs.
- Development of business plans for TICs to ensure their viability, including retailing and commission guidelines.
- Development, through training, of a network of licensed guides which can be contacted through the TIC network, capable of providing tip quality tours on bird-watching, nature, culture and other aspects of the trilateral Prespa Lakes basin.
- Language training for TIC staff, relative to markets being attracted.
- IT training for TIC staff, National Park staff and the private sector in on-line bookings, etc.
- Physical upgrading and branding of TICs, complementing and not displacing national branding.
- Development of hiking and ecotourism options starting from each TIC.
- Production of a user-friendly trilateral Prespa Lakes basin tourist map, of a similar standard to SPPs Prespa Guide and Map (2001).
- Development and maintenance by TIC staff of a user-friendly trilateral Prespa website, incorporating the trilateral map and linked to commercial booking engines for accommodation and activity packages<sup>16</sup>.
- Structured liaison with national tourist boards and tour operators to further the marketing of the Prespa Lakes basin.



The estimated cost of this initiative is US\$ 500,000 over five years.

Information boards put up by National Park Galicica  
photo: Lj. Stefanov

**Target: TIC Network established and business plan for the network put in place by end of year 1.**

<sup>16</sup> It is not recommended that an ‘own’ booking engine be developed owing to the high cost of development and (in particular) the high cost of marketing an unknown booking engine.

## Action 2.3: Prespa Ecotourism Academy

A need for trained tour guides to assist the development of activity tourism is apparent in the Prespa Lakes basin, and there is a wider need for training in best practice in ecotourism. The same problem affects other regions of all three countries, and neighbouring states.

An opportunity exists to develop an international Ecotourism Academy to provide quality training in these areas for the whole region and further afield. The Academy might be housed in the Thematic Centre near Pyli which has good conference facilities, and use local accommodation off-season, or other building or possibly be purpose-built.

An example of such an academy currently under development is the Royal Society for the Conservation of Nature (RSCN) Ecotourism and Rangers Academy in Ajloun in the North of Jordan. This academy is however a new-build centre. It specializes in the training of eco-guides and environmental rangers and in the management of eco-lodges and environment related tourism services. It is the first such centre in the Middle East region and it is being built to support new economic and career opportunities in tourism. The academy will also provide continuous training for environmental rangers and tourist police in ranger skills, environmental policing and enforcement practices. The RSCN Academy is being supported by the United States Agency for International Development (USAID) and the United States National Parks service, and will be developed to provide international standards of training and certification. It will be run on a business basis, offering courses to a quota of international students to support revenue generation.

The RSCN Academy will have the following facilities: training rooms, conference room, library and computer suite, medical clinic, search and rescue training area, equipment room, common room, staff accommodation, showers, toilets, storage areas and staff and trainee dining areas. It will also be integrated with a Wild Jordan visitor complex with restaurant and interpretative centre. Accommodation for students will not be provided at the Academy site but located in the nearby village in order to bring revenue and job opportunities for the local community. The cost of developing the RSCN Academy is US\$ 3.5 million.

### Trans-boundary opportunity

The Faculty for Tourism and Organisational Sciences in Ohrid could have much to give to this initiative, including international accreditation of courses. SPP can also provide excellent conservation guidance. The cost of such a project (if housed in existing facilities) could be around US\$ 1 million, including curriculum development, refitting and start-up costs.

An alternative location or project in Albania could be the development of a as 'wetland center' or 'international wetland ecotourism center' hosting also some research and monitoring capabilities and tools.



## 8.3 Flagship projects - nature

### Action 3.1: National Parks

The area's National Parks are the primary asset for tourism, both domestic and international. Each National park has, or is in the process of developing, a management plan which comprehensively covers visitor management and, in most cases, products which can be developed for tourism. All National Parks in the region face funding challenges. The PPMC must facilitate the parks in their tourism development projects, and the following areas are suggested as priorities for possible joint areas to be taken forward, ideally in the overall context of the recommended trans-boundary Biosphere Reserve:

- Upgrading of selected in-Park accommodation facilities to meet international accommodation standards, including PPPs;
- Continuing development of hiking, biking and equestrian trails within the Prespa Lakes basin, giving preference to routes linked to accommodation within and without the Parks;
- Upgrading of coastal zones to improve conservation, interpretation and visitor access.



*Golemo Ezero (The Big Lake), one of the two glacial lakes in National Park Pelister  
photo: Lj. Stefanov*

**Target: Develop a themed joint National Park funding proposal and secure funding within three years.**



*Information boards in the National Park Pelister  
photo: Lj. Stefanov*

## Action 3.2: Prespa islands

Islands present very interesting possibilities for tourism, if responsibly planned and managed. They are inherently interesting places to visit, and well managed and controlled visitation can command premium prices in return for quality, unique experiences. Issues of safety arise, as with any water-based tourism. They are also fragile ecosystems and must be respected as such.

*The Golem Grad Island  
photo: Daniel Bartsch*



Golem Grad island is at present Strict Nature Reserve<sup>17</sup> within the National Park of Galičica. The National Park does however promote it a visitor attraction and a marked trail route around the island and information boards have been provided. It is possible on a informal basis to hire a boat from lakeside villages (principally Konjsko and Stenje, but also Pretor and Dolno Dupeni) to visit the island and visits should always be accompanied by a Park Ranger.

The 20 hectare island is of very considerable interest, rising 30 meters above the waters of Macro Prespa, but it is relatively little visited at present. Its important natural features include more than 200 species of plants, many of which are rare including the Greek Juniper (*Juniperus excelsa*); many bird species which nest on the island; and flocks of Dalmatian Pelican (*Pelecanus cruspus*) and other water fowl. It is also famous for its large population of snakes, giving the island the popular name of 'Snake Island' in some guidebooks.

The island is also of immense historical interest and is highlighted by UNESCO (Grozdabova, 2008) as being of unique cultural importance. Its archaeological record shows evidence of inhabitancy from Neolithic times, and rich archaeological evidence has been discovered from the 4th century BC, through Hellenistic and Roman times. The early Christian period is represented by two early churches and at least six from the later mediaeval period. The Church of St Peter contains very important 14th century frescoes which depict the siege of Constantinople by the Persians.

The island has potential to be developed by the National Park as a high quality and high price/value, managed tourism experience of international appeal. It could be made a very special place to visit requiring pre-booking online with the National Park. Indeed unless a stronger visitor management plan is put in place, the deterioration of the island's environment would seem very likely as unsupervised tourism increases. The Galičica National Park would welcome funding to develop a tourism management plan.



The Golem Grad Island  
photo: Lj. Stefanov

There are many remains of significant historical monuments on the island of Golem Grad, the most preserved of which is the St. Peter Church from the 14th century  
photo: Lj. Stefanov

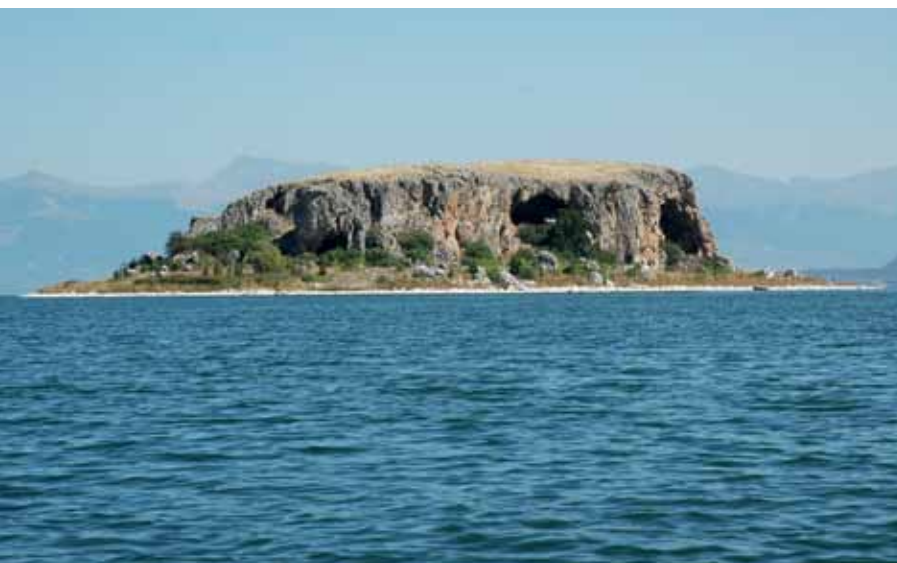


<sup>17</sup> IUCN category 1A, a protected area managed mainly for science  
(Eagles & McCool, 2002: 19)



The steps needed to deliver a high quality, high value sustainable eco-tourism product will be as follows:

- An EIA to guide visitor management.
- A visitor management plan including litter collection and rules and policies for island visits (no dogs, no fires, for example)
- A good quality covered boat (meeting international safety standards) capable of taking supervised groups from the National Park Centre at Stenje to the island, with upgraded landing facilities at Stenje and Port St Peter, and improved parking facilities at Stenje.
- A small reception centre/shelter and toilets on the island.
- Superbly trained guides from the National Park to accompany all visitors.
- Enhanced interpretation at the National Park Centre at Stenje (to be included in ticket price) to explain what visitors are about to see while they wait for the transfer boat, and on the island itself. If museum storage conditions can be met, archaeological finds from the island might also be displayed here, such as the continuous collection of coins found on the island spanning the entire Roan period, and superb gold and silver jewellery dating back as far as the 3rd century BC.
- Trained boatmen and reception staff.



*The Mali Grad Island  
photo: G. Schwaderer*

Based on a review of guidebooks, Golem Grad is already seen as Macro Prespa's main (and sometimes only) attraction. A high quality packaged product here will attract tourists from Ohrid, Greece and further afield and could command a premium price from special interest groups (discounted to tour operators).

Mali Grad island in Albanian waters also is an important bird-watching site and has an important hermitage with Byzantine frescoes (Shen Maria cave Church). It is accessed using small boats from lakeside villages.

### **Trans-boundary opportunity**

Pharaoh's Island in the Gulf of Aqaba just off the coast of Sinai belongs to Egypt. Its main attraction is an Ottoman fortress and coral bays. By special arrangement through tour operators it can be visited by boat by tourists resident in Jordan who do not have visas to enter Egypt. This is done by tour operators collecting and retaining visitors' passports



and surrendering them to border authorities the night before a visit and collecting them afterwards, and paying the admission charge/landing fee for visiting the island to the Egyptian authorities.

Similar arrangements could perhaps be made for the Golem Grad and/or Mali Grad to be visited by tourists residing in Albania and Greece on payment of an admission charge, if there is political will to develop tourism and extend length of stay. Prespa's islands could become a flagship 'trans-boundary' tourism product and benefiting both the National Parks and accommodation providers in all three jurisdictions through helping to extend length of stay, which is a key challenge. Trip boats from Psarades and Albania are already the subject of EU funding applications through the municipalities there.

The development cost of this proposal would need careful study with the National Parks. US\$ 2 million is suggested, including a boat for Galičica National Park for accommodating groups.

### Action 3.3: Prespa Lakes Discovery Centre

The Ezerani Reserve is currently an IUCN category 1A Strict Nature Reserve, but it is planned to reschedule it as a Category III National Monument<sup>18</sup>. There are hides but no interpretation facilities at present. The management of the reserve is under review.

It may be possible to attract European neighbourhood funding for the development of a 'Prespa Lakes Discovery Centre' as a flagship interpretative centre on the edge of the Ezerani Reserve could also be explored. It could become Resen's main attraction. The Discovery Centre could contain the following:

- extensive information about the lakes gathered by the UNDP-GEF project,
- interpretation regarding the lakes, bird-watching and its special species (pelicans, cormorants, etc.),
- an education room, geared towards school children;
- meeting facilities for the local community, to be used to train and encourage them in conservation and responsible agricultural practices;
- veterinary/research facilities for wildfowl;
- a small indoor theatre, to be used for events, lectures and showing an audio-visual about the region; and
- observation areas, restaurant, art gallery.



<sup>18</sup> A Protected Area managed mainly for conservation of specific natural features (Eagles & McCool, 2002: 13)



Part of the collection in the private museum  
of Jone Eftimovski in Podmocani  
photo: Lj. Stefanov

The facility should be a very well designed architectural flagship appropriate for a Ramsar site.

In addition Jone Eftimovski's superb collection of traditional costumes and jewellery (presently displayed in a domestic setting in Podmocani) might also, if secured for posterity, form the basis for a stunning costume gallery, to be housed in the Discovery Centre building, if museum storage standards for fabrics can be met. The advice of museum specialists is needed on how to conserve and display this important collection, which is a ready-made tourism asset for the region that more could be made of.

The cost of acquiring the collection for the state or municipality and the cost of conservation is not known.

There are many examples of the type of interpretative centre that might be developed. One example developed through European INTERREG funding is the Lough Neagh Discovery Centre in Northern Ireland.

#### Trans-boundary opportunity

There is an opportunity to capture an existing market of bird-watchers who visit Macro Prespa, and to extend length of stay, by developing a joint bird-watching package covering both countries. SPP would have much to give in terms of experience in terms of advising on the development and management the Ezerani Reserve. It is engaged in a cross-border activity already with the Zagradec Information Centre and the National Park Centre in Stenje.

The cost of such a development could be around US\$ 2.5 million, depending on the scale of project proposed.

#### Action 3.4: Prespa Lakes Blue Flag beaches

In order to counter negative images of poor water quality in the Prespa Lakes (which compared to other large European lakes such as Lake Constance is much more an unspoilt wilderness area), it is recommended that the Municipality of Resen in the former Yugoslav Republic of Macedonia commence the process of upgrading facilities at one beach (possibly Pretor) to achieve blue flag status.

The process will require technical advice but the following are examples of some of the criteria for achieving blue flag accreditation. These are not insurmountable:

- There may not be any gross pollution of the beach by visibly sewage-related or other waste. If there is it must be regularly removed. Water quality must be tested during the bathing season, sampling must be carried out at least fortnightly by an accredited laboratory and published.
- An emergency plan must specify who does what in the case of an

emergency, including pollution incidents.

- There may not be any untreated sewage discharged from the local community.
- Information on natural sensitive areas in the coastal zone, including its flora and fauna must be publicly displayed and included in tourist information. The information must include advice on how to behave in such areas.
- There must be a display on the beach updated information about bathing water quality in the form of a table or figure that can be easily understood by the general public.
- The local community must have a land-use and development plan for its coastal zone. This plan and the current activities of the community in the coastal zone must be in compliance with planning regulations and coastal zone protection regulations. If the community is very small it may be part of a larger regional plan.
- Litter bins in adequate numbers, properly secured and regularly maintained and emptied. Adequate provision for refuse, algal matter and other pollutants collected at the beach. The waste collected at the beach must be disposed of in a licensed facility.
- A daily beach clean during the bathing season when necessary.
- On the beach there will be no:
  - driving unless specifically authorized;
  - beach bike or car races;
  - dumping; and
  - unauthorized camping.
- There must be management of different users and uses of the beach so as to prevent conflicts and accidents. If there are natural areas bordering the beach, steps must have been taken to prevent negative impacts from the use of and foot and other traffic to and from the beach and its waters.
- Adequate and clean sanitary facilities with controlled sewage disposal.
- Beach guards are on duty during the bathing season and/or there are adequate safety provisions, including lifesaving equipment and directions for their use and immediate access to a telephone.
- First aid must be available on the beach and its location easily identified.
- National laws concerning dogs, horses, and other domestic animals must be strictly enforced on the beach.

The Blue Flag initiative could be built into the proposed municipal master plan for Pretor, or another village.



*Beaches in Prespa: Dolno Dupeni, Otesevo, Pretor, Stenje  
photo: Lj. Stefanov*



### Trans-boundary opportunity

The initiative could be put forward as a joint project with a similar initiative for a beach on Macro Prespa in Greece, if there is sufficient interest in accessing cross-border funding.

The cost of development is estimated at US\$ 150,000 over three years, excluding physical works.

### Action 3.5: Albanian Prespa tourist viewpoint



*View to Macro Prespa, Mali Grad and  
the Pelister Mountain  
photo: Lj. Stefanov*

If municipal services can be put in place for rubbish collection in cooperation with communes, and other basic services provided, tourism in Albanian Prespa will grow. TICs are operating or under development near both lakes and these can be hubs for tourism. In addition better planning of development on the main road to the Stenje border crossing is needed. At present economic activity is moving away from the lakeside villages to the road and this trend will continue, evidenced by ribbon development of houses. There is a need for better planning control and an opportunity to develop the area between the new National Park Centre and the road as an attractive coach stop, as it offers superb views to Macro Prespa, Mali Grad and the Pelister Mountains.

An example of such a facility is Ladies View in Ireland, overlooking the Killarney National Park. This has developed from a roadside 'photo-stop' with toilets into a major centre for craft retailing and other tourism services, regularly used by passing tour groups. Coach bays with tourism services are also widely used by the Asian Development Bank as a means of enabling rural communities to benefit from new motorways, for example on Trans-Asia Highway 9 which passes through rural areas of Vietnam, the Lao People's Democratic Republic, Thailand and Myanmar.

The steps to deliver such a project would involve detailed site selection (based on tourism potential and physical suitability), land acquisition, development of a quality architectural and landscape plan with future development guidelines, and construction including toilets and a safe photo/viewing area. The project would be suitable for PPP if development on other roadside sites in the area can be restricted. Responsible development policies would need to be applied, giving local villages fair access to sell their produce.

The indicative cost for the site works and development is US\$ 50,000.

**Target: Secure funding and develop a coach stop with services within three years. Ensure local community engagement**



## 8.4 Flagship projects – culture



*The House of Culture in Resen  
photo: Lj. Stefanov*

### 8.4.1 Introduction

While it is very desirable to preserve as much important heritage as is possible, tourism is not always the best means of doing so. Indeed it is not feasible to develop or promote all heritage products to the visitor market. For a variety of reasons not all heritage assets, even some with major historical significance, will appeal to visitors or be able to cope with large numbers of visitors. It must be recognised that, unfortunately, most visitors are limited in their appreciation of history, art and architecture. They tend to be interested in those that have a “wow” factor, i.e. are well known and impressive in some way and easy to appreciate, often through on-site interpretation. There are however some special interest visitors who will wish to visit all historic churches in the Prespa Lakes basin, but responsible tourism planning must plan for the needs of the former group to protect the most popular heritage sites. Putting in place a UNESCO Heritage Management Plan as part of World heritage Site designation is the recommended way forward, both to protect universal heritage and to help provide the Prespa lakes basin with more profile and market appeal.

*St. George church, Kurbinovo  
photo: Lj. Stefanov*





*St. George church, Kurbinovo*  
photo: Lj. Stefanov

The selection of heritage attractions with potential to be marketed to visitors takes into account the visitor's needs, that is their desire to obtain enjoyment (and education) in an undemanding fashion. Some of these criteria can be the following:

- Proximity to established touring routes – ease of access
- Proximity to other major attractions – part of a cluster
- Impressive in their location – scenic, dramatic, romantic, etc
- Impressive in their particular features
- Relevance to the visitor's own heritage
- Uniqueness
- Links to well known people / characters or myths and legends
- Ease of engaging in the attraction, i.e. how well it is interpreted and brought to life.

*...special interest visitors who will wish to visit all historic churches in the Prespa lakes basin...*  
photo: Lj. Stefanov



Some outstanding attractions in remoter areas may be of interest. The criterion is whether the effort of the journey (and sometimes the journey itself) is justified by the end experience and its quality.

In June 2011, the National Geographic Traveller magazine published a 47-page supplement on the Western Balkans, described as “one of the most magical places in the world” (Tsui, 2010). The supplement showcases some of the region's hidden treasures, providing glimpses into the history, cuisines, and cultures of Albania and the former Yugoslav Republic of Macedonia, together with other countries. Greece is of course one of the world's greatest heritage tourism destinations. There will be rising market interest in ‘undiscovered’ regions which the whole Prespa Lakes basin can capitalize on.



### Action 4.1: Prespa Lakes Basin UNESCO World Heritage Site

At present Prespa is on the Tentative World Heritage List, nominated by Greece for both culture and nature. The citation largely relates to Greek Prespa although the trans-boundary element is mentioned, but this could be greatly enhanced and strengthened in a trans-boundary submission. Trans-boundary funding could also be sought. The draft nomination notes the following:

*The area of Prespes is a large basin at an altitude of 850m which contains two lakes, Mikri and Megali Prespa. Megali Prespa is today located in FYROM (sic.), Albania and Greece while Mikri Prespa is entirely located within the latter two countries. The area is characterized by outstanding natural beauty and has been inhabited without interruption from antiquity (with traces of ancient inhabitation in the area of “Lemos” and on the island of Agios Achilleos) to the present day.*

*The Prespes Lakes area flourished at the end of the 8th century both under the Byzantine Empire and during the intervening periods of Bulgarian domination under the kingdom of Syrneon and Samuel. The area also flourished during the 10th and 11th centuries in particular with the establishment of the Archbishopric of Achrida by the Basil B II. During the 12th century Prespes was a Byzantine “Theme”. During the 14th century the area of Prespes was incorporated in the Serb state of Stefan Dusan while in 1386 AD it was conquered by the Turks. Throughout the entire duration of the Ottoman Empire the population recouped and dedicated itself to Orthodoxy and religious tradition. In the 19th and 20th centuries the area followed the general historical developments and acquired particular importance at certain historical moments. The local population, and Orthodoxy in general, have closely associated the area, its history and its natural beauty with myths, legends and traditions.*

*The Prespes region contains the highest degree of species biodiversity in a corresponding surface area in Europe. It is a unique limnetic landscape of outstanding natural beauty that includes a wealth of monuments from the Byzantine and post-Byzantine period. The uniqueness of this monument lies in the interaction between man and nature and in particular in the use of natural caves to construct hermitages by the monastic community which settled here between the 13th and 18th centuries. B. Monuments The area is scattered with Byzantine and post-Byzantine monuments with characteristic architecture and painted decoration.*



Cave churches in the vicinity of Psarades  
photo: S. Hristovski



Two species of cormorants (big and pigmy) who live in Prespa can often be noticed together  
photo: Lj. Stefanov

Moreover, the area is one of the most important biotopes in Greece with 260 species of birds. The grey goose (*Anser anser*) and the goosander (*Mergus mersander*), cranes (*Ardeidae*), cormorants (*Phalacrocorax carbo sinensis*) and pygmy cormorants (*Phalacrocorax pygmeus*) nest here, as well as quite a few species of duck, terns, birds of prey, woodpeckers, etc. It is the only area in Europe other than the Danube Delta and the former USSR where two species of pelican reproduce, the White pelican (*Pelecanus onocrotalus*) and the Dalmatian pelican (*Pelecanus crispus*). The water meadows surrounding the lakes are home to significant amphibians and reptile populations.

< <http://whc.unesco.org/en/tentativelists/1791/> >

### Trans-boundary opportunity

There are more than fifteen examples of trans-boundary World Heritage Sites in Europe alone. Ancient enemies Germany and Poland share responsibility for the Muskauer Park; the Cultural Landscape of Fertő is shared between Austria and Hungary. If funding can be secured to progress Prespa's World Heritage inscription (a lengthy technical process), all three countries would benefit. A robust system of heritage management would also be put in place and access to funding eased. Universal rather than modern neo-political interpretations of heritage would be emphasised and the area's tourism profile would be greatly increased.

The cost of surveying all heritage sites and drafting management plans to achieve World Heritage Site listing will be substantial. Funding in the region of US\$ 300,000 will be needed over five years.

### Action 4.2: Monastery accommodation

The former Yugoslav Republic of Macedonia's National Tourism Master Plan (Ministry of Economy, 2009) calls for the development of monastery accommodation:

*Monastery accommodation as a unique experience should be further developed. This is a tourism experience with great potential not just to pilgrims, but to other culturally-aware visitors. (2006:157)*

However this concept can be taken even further by developing a monastery as a more developed visitor attraction with a refectory (restaurant), a monastic garden to visit, a craft shop and interpretation. Maronite monasteries in the remote mountains of Lebanon are developed for tourism in this way.



The monastery in Slivnica (dedicated to Holy Virgin Mary) is property of the Macedonian Orthodox Church. It is no longer operational, meaning there are no monks living there currently and no church services on regular days. However the living quarters are available for people interested in spending time there. The monastery was built in 1607, and the church within the complex and the frescoes are from that period. The living quarters were built at the end of the 17th century, but destroyed in fires and consecutively restored (the latest restoration in 1998). Some people believe that the waters in the vicinity have healing properties and visit the monastery for this purpose also.

The monastery's main attraction is its extraordinary frescoes in a setting of architectural completeness with three gates named in relation to the villages they face. The mural paintings in the nave and iconostasis are linked with anonymous painters whose other works can be seen in today's Greece and Bulgaria. In addition to an abundance of well known Biblical and apocryphal scenes, there are portraits of important donors, holy poets, monks, healers and warrior martyrs. A superb Last Judgment covers the West Wall (Popovoska, 2008). These magnificent works could be of greater visitor and tourist interest, but procedures and facilities need to be put in place to explain and (most importantly) to protect them. A visitor ad heritage management plan is needed. Slivnica Monastery is a cherished and revered place: Obviously only the most sensitive and sympathetic interventions can be made and the agreement of church authorities and state authorities/UNESCO would be needed to take this concept forward.

The monastery has around 20 rooms with 90 beds. These should be sensitively upgraded. The monastery could also be used as a special place for meetings.

#### **Trans-boundary opportunity**

In addition nearby buildings might be developed as a Centre of Peace and Reconciliation, giving the development a less seasonal, academic, conference and community-building role. Examples of such centres have been developed in Ireland and Australia and run continuous seminars and have a wide reach for meetings and conference tourism. An example is the Glencee Centre for Peace and Reconciliation<sup>19</sup> in Ireland's Wicklow Mountains.

The cost of developing this site will require detailed architectural input. A figure of US\$ 200,000 is provisionally ascribed.

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<sup>19</sup> <[www.glencee.ie](http://www.glencee.ie)>

## 8.5 Activity tourism

### Action area 5

If the Prespa Lakes basin is to attract new and younger markets, sustainable and responsible activity tourism is a product which can offer in abundance. It can also attract more off-season visitors, as hiking through the Prespa lakes basin in spring, autumn and winter landscapes



*The neighboring national parks Pelister and Galicica offer great opportunities for mountaineering  
photo: Lj. Stefanov*

is a superb experience. The four national parks are developing new trails and activity options through their planning processes, however viable activity tour operator businesses are essential if these new products are to be presented to the market and ground handling arrangements organised on a commercial and professional basis. At present there is a shortage of licensed activity tourism operators in all three countries who can drive this process forward in partnership with the national parks and other tourism interests. Some small tour operators are however beginning to emerge, and these must be encouraged to offer product in all three countries and facilitated to expand: They will form the bridge between Prespa's activity tourism product, and the market, and be the means of filling local accommodation which meets market standards. Tourism is a private

sector driven, service industry: This is not a role which state parties can generally successfully deliver.

SME development support needs to be applied to local tour operators and ground handlers to facilitate their growth and survival. Support might take the following forms:

- Fiscal incentives for activity tourism SMEs if the area<sup>20</sup> were to recognised as a Special Economic Zone (SEZ) for activity tourism.
- Specific marketing support to enable local tour operators featuring trilateral Prespa to get to international travel fairs to sell commissionable product.
- Supporting local tour operators to develop research-based, professional business plans.

<sup>20</sup> Given the geopolitical complexities of the region and of the EU border, this would be difficult to deliver on a trilateral basis.

There may also be opportunities for NGOs active in tourism to form more meaningful partnerships with activity tourism operators in Prespa, Ohrid, Korçë, Tirana, Skopje and Athens.

The accommodation sector will also need to adapt to the needs of this emerging segment: Drying rooms for equipment; bike storage facilities; the availability of meals to suit hikers and excellent local knowledge can be provided to attract and retain activity tourists. Hostel accommodation to facilitate groups seems to be in relative short supply, although there is potential to upgrade in-park huts and other accommodation. CTP has identified an opportunity to attract younger, back-packing tourists to the Prespa Lakes basin, and this will be a good long term investment for the future, and help in making Prespa 'fashionable'.

The management plans of National Parks also need funding to improve services for tourists, both domestic and international. The proposed Biosphere Reserve project, if adopted by PPMC as its primary means of operation, could attract funding for these developments.

An indicative figure of US\$ 100,000 over five years is proposed for marketing and SME development support. Matching funding should be sought from beneficiaries.

## 8.6 Domestic tourism

### Action area 6

Domestic tourism is and will remain the mainstay of the Prespa Lakes basin's tourism product for the next five years, until more international flagship products are developed and local facilities improve. Indeed, tourism industries with strong domestic markets can be the most viable and sustainable of all, because they are less threatened by the fickle nature of international tourism demand, as destinations go in and out of fashion, or when security and health scares occur. Not all parts of the basin are however keeping abreast of the needs of domestic markets, and more market research is needed.

*Recreational fishing is very popular among local tourists*  
photo: Lj. Stefanov



The proposed redevelopment of Pretor village by the Municipality of Resen presents an interesting opportunity to address the needs of today's domestic tourists, and attract international visitors. Some market research is needed to explore the facilities they will be attracted by, and careful planning is needed to facilitate these in a sustainable way. Possible elements that could be included in a tourism master plan for Pretor might include the following:

- Guidelines on building forms, ideally respecting vernacular traditions;
- Zoning for mixed residential, commercial, recreational and educational facilities;
- Upgrading the beach area, ideally to blue flag standard<sup>21</sup>;
- Slipway facilities, water-sports centre and perhaps a small marina;
- Franchising areas for quality tourism facilities ideally on a PPP basis requiring maintenance regimes, such as camp sites and beach leisure areas; and
- Possibly providing an all-weather swimming pool or water-park as a market opportunity<sup>22</sup>.

Planning costs are being estimated by the Municipality of Resen.

## 8.7 Events and conference tourism

### Action area 7

Events are already an important part of tourism in the region, particularly in the villages of Micro Prespa. Most events however take place during the summer, when occupancy is highest. In terms of addressing seasonality, events need to be devised and marketed which will attract off-season visitors. Events planning needs to take into account the facilities which are available (in particular all-weather facilities) and the accommodation base. There is also potential to attract more conferences in a systematic way on the key themes of nature, culture and ecotourism. Possibilities might include the following:

- A hiking festival, taking place in winter landscapes;
- Ornithology conferences and other nature and culture symposiums;
- Musical events in churches (if permission is granted);

<sup>21</sup> It is assumed that sewage treatment provision will be part of the plan.

<sup>22</sup> There is no public swimming pool in Resen and limited facilities in Bitola.



- Other heritage events, such as a symposia on the Via Egnatia or vernacular architecture;
- Cultural courses and language schools;
- Culinary events and cookery schools.

#### Trans-boundary opportunities

- A Prespa triathlon travelling through all three countries<sup>23</sup>.

Funding for events development will be needed. A figure of US\$ 200,000 is recommended. Matching sponsorship should also be sought.

## 8.8 Marketing

### Action area 8

#### Marketing objectives

The Marketing Plan has the following objectives:

- *To create awareness of the Prespa Lakes basin as a superb location for ecotourism, nature, culture and activities through partnering with national tourist board and other regional and domestic marketing initiatives.*
- *To promote trans-boundary tourism which extends length of stay in the region by marketing specific trans-boundary products (as they are developed).*
- *To promote off-season products and events in the Prespa Lakes basin.*
- *To make holidays in the Prespa Lakes basin easier to book.*

It is recommended that the marketing plan be implemented through partnerships and involve very close liaison with the three national tourism authorities and the travel trade.

<sup>23</sup> A triathlon is a multi-sport event involving the completion of three continuous and sequential endurance events. While many variations of the sport exist, triathlon, in its most popular form, involves swimming, cycling, and running in immediate succession. Triathlon races vary in distance. The main international race distances are Sprint distance (750 m swim, 20 km bike, 5 km run), Intermediate (or Standard) distance, commonly referred to as "Olympic distance" (1.5 km swim, 40 km ride, 10 km run), the Long Course (1.9 km swim, 90 km ride, 21.1 km run, such as the Half Ironman), and Ultra Distance (3.8 km swim, 180km ride, and a marathon: 42.2 km run, ironman).

### Target markets

The most cost-effective target markets for Prespa Park to target are

- Domestic and regional markets;
- International travellers visiting the Balkans and Northern Greece who may be attracted to include the Prespa Lakes basin area ; and
- Special interest travellers, in particular birdwatchers and cultural heritage specialists. These are also likely to be including the Prespa Lakes basin as part of a tour covering other regional destinations.

### Products to be marketed

The products which it should be possible to deliver to meet the market needs of these target groups in the next five years will be based around the following themes:

- Ecotourism;
- Nature;
- Culture;
- Activities;
- Domestic tourism offers; and
- Events and conferences.

### Place

The key places for cost effective marketing activity of these products are the following:

- The Internet: A vibrant and visitor-friendly webpage, well linked and publicised, is seen as the number one marketing need.
- The travel press, in particular the regional travel press and those who can be identified through national tourist boards as having an interest in the region.
- Gateways on the main routes into the region are seen as key places to address the target audiences identified. These include nearby cities where there are Gateway Information Centres, and where (if funding allows) posters and Prespa Park directional signage can be erected (in accordance with national planning laws).
- Airports and airlines servicing incoming tourists.
- National tourist boards' marketing activities (where considered relevant and cost-effective).
- Special interest groups and societies' webpages and meetings.

### Price

The Prespa Park executive should not be involved in negotiating prices: This is a matter for the private sector, however the Park executive should give accurate feedback to the private sector on price sensitivities.

## Promotion

The development of the following promotional tools is recommended:

### Year 1

- A vibrant website in Albanian, Macedonian, Greek, English and German, for the Prespa Lakes basin Biosphere Reserve.
- A more product-orientated tourism brochure, to replace the existing Krafting Group guides (UNDP 2009 a & b), with copy written by a tourism journalist (not taken from strategy documents).
- A user-friendly, colourful and informative map of the Prespa Lakes basin, highlighting what to see and do, similar in style to the SPP map of Greek Prespa (SPP, 2002).
- A press pack, with same itineraries and interesting stories and story-lines for the travel press.
- Display material for use at school promotions, exhibitions with national tourist boards, events, etc.

### Year 2

- Promotion to schools and shopping centres within 3 hours' drive of Prespa Lakes.
- Production of special interest brochures with maps and webpages (bird-watching, nature, heritage, caves) for the biosphere reserve.
- Sales calls to tour operators and travel press in Athens, Tirana, Skopje, Thessalonica and Priština.
- Purchase of specialist tourism PR services in UK and Germany (focus on special interest, bird watching, etc.).
- E-marketing to promote website.
- Joint promotion with national tourism authorities.

### Year 3

- Continuation of year 2 activity with intensification of PR activity and e-marketing.

### Year 4

- Review of effectiveness of marketing to date and update of strategy.

Indicators: Increased web presence (Google); number of hits on Prespa Park website; number of enquiries (by nationality) to Prespa executive, National Park centres and Gateway Centres; Prespa Lakes basin featured as a destination in ten regional tour operator programmes; positive press features on Prespa Lakes basin (by country).

**Target: By year 5, number of operating tourist rooms available in Prespa Park area is increased by 20% annual occupancy increased by 20%; number of visitors to National Park centres and Prespa resource centres increased by 100%**

## 8.9 Capacity development support programme

### Action area 9

Utilising the proposed TIC network and the Prespa Ecotourism Academy, continuous training should be provided to the travel trade in the Prespa Lakes basin, national park staff and local government officials. The detailed development of curricula for training programmes should be part of a Tourism Training Strategy, and should cover the wider Ohrid-Prespa Euroregion's needs to have critical mass and viability.

In addition, it is recommended that, if funding can be secured, an international capacity development expert in the area of responsible tourism development and marketing should be appointed on a long term basis (at least one year) to work with the three municipalities and the national parks. This assumes that substantial budgets for development and marketing will be secured.

The Tourism Training Strategy will need to be developed following a more detailed Training Needs Analysis than was possible in this study. Locally embedded educational institutions should be involved in this planning process, and in delivery.

The area's human resource development needs for tourism are significant and, as tourism develops, would best be dealt with by a more detailed regional tourism training strategy. Tourism training resources vary significantly between the three countries with Greece probably being the best resourced in terms of vocational and university-level tourism training programmes available in most larger cities. In Albania Fan Noli University offers tourism in Korçe region; and in the former Yugoslav Republic of Macedonia there are faculties of tourism and leisure at the St Clement's University, Ohrid and in Skopje. Vocational training will be the primary need.

It is recommended that the following vocational tourism training programmes be initiated:

- Start your own business
- Running a bed and breakfast
- Running a small hotel
- Food safety (hazard analysis and critical control points, HACCP)
- Visitor attraction management
- Marketing for small businesses
- Customer care
- Language courses and cultural awareness programmes

In the former Yugoslav Republic of Macedonia the Agency for the Promotion of Entrepreneurship could be mobilised to assist in SME



opportunities in tourism. The Agency has previously developed award winning tourism marketing training for SMEs<sup>24</sup>. Engagement with tourism training institutions in the three littoral states is recommended. A tendering process for the delivery of quality tourism training (to be delivered in local languages) is recommended.

It is recommended that the executive of the trilateral Prespa Park, once recruited, and of the state-based nature reserves, be facilitated to undertake relevant additional training programmes. This will add to their expertise and help encourage staff retention.

**Target: Tenders to be invited by end of year one. Courses to run (with ongoing independent appraisal) years 2-5. Future tourism training strategy to be commissioned in year 4.**

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<sup>24</sup> <<http://www.apprm.gov.mk/projects.asp?id=4>>

Key action	Priority level	Indicative budget (5 years)	Responsible parties
Action 1.1: Establish a well resourced Prespa Park executive to implement this strategy	1	500,000	PPMC
Action 2.1: Put in place a framework for sustainable development through the UNESCO Biosphere Reserve MAB Programme	1	100,000	PPMC, National Parks, Ministries for the Environment
Action 2.2 Establish the Prespa TIC Network	1	200,000	PPMC
Action 2.3 Prespa Ecotourism Academy	2	1,000,000	PPMC, SPP
Action 3.1 National Parks	1	2,000,000	PPMC, National Parks
Action 3.2 Prespa Islands	2	2,000,000	PPMC, National Parks
Action 3.3 Prespa Lakes Discovery Centre	2	2,500,000	PPMC, Municipality of Resen
Action 3.4 Prespa Blue Flag beaches	1	250,000	Municipalities
Action 3.5 Albania tourist viewpoint	1	50,000	PPMC, National Park, Municipality.
Action 4.1 World Heritage List enlisting	1	300,000	PPMC, Ministries of Culture and Environment
Action 4.2 Monastery accommodation	2	200,000	PPMC, church authorities, Ministry of Culture
Action 5: Activity tourism, SME development support	1	100,000	PPMC, Ministry of Economy
Action 6: Domestic tourism development Pretor	1	Not known	PPMC, Municipality of Resen
Action 7: Events and conferences	1	200,000	PPMC, Municipalities, CTP
Action 8; Marketing	1	500,000	PPMC, marketing partners
Action 9 Capacity development	1	500,000	PPMC, Ministries of Economy, Tourism
Pilot projects (chapter 9)	1	450,000	PPMC

Timing	Monitoring mechanism	Success criteria
Year 1	Project reporting procedure	Staff successfully recruited and retained
Years 1-3	Progress towards Biosphere designation under the UNESCO MAB programme	Biosphere designation achieved
Year 1	Visitor numbers to TICs and viable operations	Viable TIC network
Year 1-5	Project management cycle reporting	Funding secured, facility under development
Years 1-5	National Park Management Reports	Additional funding secured
Years 1-5	Project management cycle reporting, visitor numbers	Additional funding secured, under development
Years 1-5	Project management cycle reporting, visitor numbers	Funding secured, facility under development
Years1-3	Progress towards achieving Blue Flags, Blue Flag reporting	Blue Flags achieved
Years 1-3	Project management cycle reporting	Additional funding secured, under development
Years 1-5	UNESCO progress report, zonings agreed, sites surveyed, management plans agreed.	World Heritage inscription achieved
Years 1-5	Memorandum of agreement, project cycle management reporting	Funding secured, facility under development
Years1-3	Number of SMEs supported, activity tourism visitors attracted, matching funds raised,	Growth in activity tourism
Years 1-5	Municipal planning progress reporting	Redevelopment of village and beach areas
Years 1-5	Project cycle management reporting, number of off-season events, numbers of visitors attracted, sponsorship raised	Events viable and sustained
Years1-5	Project cycle management reporting, numbers of visitors attracted, accommodation occupancy, memorandums of agreement for marketing partnerships	Increases in occupancy, visitor numbers, investment
Years 1-5	Training needs analysis undertaken, training strategy developed, memorandums of agreement with implementing parties, numbers trained.	Trainings completed, improvements in customer satisfaction.
Years 1-2	Progress on ToRs, tendering, project execution.	Pilot projects completed and objectively assessed.



photo: Lj. Stefanov

## 9. Pilot projects

### 9.1 Introduction

Pilot projects are different from activities in the Action Plan which will require long term attention. Pilot projects are of still strategic value but can be taken forward immediately with smaller resources.



## Pilot project 1: Market research

### Description and Motivation:

A number of innovative and quite large scale development projects are being put forward in the strategy. In addition to EIAs additional pre-feasibility analysis is recommended. Travel trade research should be undertaken to solicit the views of major tour operators and other inbound agents to the Western Balkans and Greece about these projects. The research will ensure that these projects will be of interest to the future tourism market, provide design input suggestions and help to prioritise them further. The research should be professionally commissioned and involve a relevant selected sample of key inbound tourism players. It should be undertaken face-to face at an event like Internationale Tourismus-Börse (ITB) in Berlin in March, or via a telephone survey.

### Goal:

To ensure that flagship development projects in the Prespa Lakes basin will be market-led.

### Objectives:

- To ensure that proposed developments are feasible in terms of future market demand;
- To provide input to project design, in terms of likely future market needs;
- To engage with tour operators about Prespa Lakes basin and future development plans;
- To ensure that development funds are spent wisely.

### Obstacles and Impediments Likely to Affect Implementation:

Willingness of tour operators to take part in survey.  
Need for professional and unbiased surveying.

### Outcome/Results:

- Clear market guidance on prospective development projects;
- Prioritisation of projects in terms of likely market demand and feasibility;
- Views of tour operators on important design issues taken into account;
- Objective and independent evidence to support funding applications obtained.

### Action Steps:

- Draft detailed terms of reference for study;
- Invite tenders from competent tourism consultants with market research and architectural expertise;
- Score proposals and select most competent within budget;
- Brief company and supervise project execution;
- Consider survey results.

### Timeline:

2 months

### Funding:

US\$ 20,000

## Pilot project 2: Celebration of Prespa cultures

### Description and Motivation:

As culture is increasingly utilized as a means of social and economic development, the cultural tourism market is being flooded with new attractions, cultural routes and heritage centers. More sophisticated tourists are seeking authenticity which is still a rare quality to be found in modern tourism industry. The Prespa Lakes basin can offer unique taste of three cultures that have lived side by side for ages, but have faced entirely different historical, political and economic influences. Prespians of Albania, the former Yugoslav Republic of Macedonia, and Greece still do not collaborate as effectively as they could to enhance sustainable tourism development. This pilot project doesn't depend on expensive infrastructure or sensitive political decisions – it can be initiated by local artists, tourism service providers, and community leaders to contribute to better understanding, cultivation of relationships, and joint sustainable tourism actions.

### Goal:

The three cultures of Prespa Lakes basin to open up and get to know each other better, nurture and enhance productive relationships and design joint actions for sustainable tourism development.

### Objectives:

- To initiate a series of cultural exchange events between the three countries (art exhibitions, concerts, folklore dancing events, cultural tracks, etc.);
- To stimulate local people to engage in artistic activities and to raise awareness and build capacity of people for culture preservation and sustainable tourism development;
- To stimulate inter-institutional cross-border collaboration in the field of culture;
- To develop tourist offers with unique multi-country cultural experience;
- To prepare promotional materials of the Prespa Lakes basin's unique cultural/historical sights in four languages;
- To improve international recognition of the Prespa Lakes basin as a unique cross-border cultural destination;
- To extend an average length of tourist stays in the Prespa Lakes basin;
- To contribute to the increase of welfare/income of local people in the region.

### Obstacles and Impediments Likely to Affect Implementation:

Motivation of local tourism development stakeholders to engage in cross-border cultural exchange.

Financial support for implementation of the cultural exchange.

### Outcome/Results:

- At least 3 multi-cultural exchange events implemented in each of the three Prespa Lake countries;
- Awareness raising and training implemented for at least 50 people working in cultural tourism related areas from all three countries;

- Initiation of cross-border inter-institutional collaboration;
- At least three effective public-private partnership projects in tourism sector launched (new cultural routes integrating monasteries, exhibitions, churches etc., and other joint cross-border products that engage tourists – boat-trips to three cultures or similar);
- Promotional materials of the Prespa Lakes basin's unique cultural/historical sights in four languages;
- International promotion plan developed and first actions implemented;
- Contribution to the increase of tourism sector employment and revenue.

**Action Steps:**

- Identify key players in the field of cultural heritage preservation and cultural tourism development, provide inter-institutional co-ordination and initiate public-private collaboration sessions with the purpose of multi-country cultural exchange;
- Organize cultural exchange events: art exhibitions, concerts, festivals, folklore dancing events with performers from all three countries;
- Initiate cross-border inter-institutional collaboration (i.e. contribution of the School of Fine Arts of the University of Western Macedonia- Florina, and creation of a campus by the Faculty of Archeology in the former Yugoslav Republic of Macedonia);
- Provide training and awareness raising for at least 50 people working in cultural tourism related areas;
- Initiate the design of joint multi-country cultural tourism offers;
- Within a public-private partnership initiative identify differentiating features and products of the Prespa Lakes basin related to other competing cultural tourist destinations (develop a set of Prespa cultural events, routes, other tourist products for visitors that would be drawn to the Prespa Lakes basin- religious, architecture, archaeology, nature protection enthusiasts and professionals etc.);
- Identify target markets, differentiating features and products;
- Prepare promotional materials of the Prespa Lakes basin unique cultural/historical sights in four languages;
- Offer Prespa cultural tourism products to existing and new international and domestic sales channels.

**Timeline:**

18-24 months

**Funding:**

US\$ 100,000

## Pilot project 3: Prespa trans-boundary triathlon

### Description and Motivation:

Participatory marathons and triathlons of differing lengths are becoming popular tourist events around the world. A trans-boundary triathlon in Prespa involving the opening of the Dolpo Dupeni border crossing for one day could be a high profile event that would help to set the precedent for re-opening this vital border crossing for trans-boundary tourism development. It would also attract large volumes of participants if effectively marketed.

### Goal:

Link up the three territories in a common, high profile event and put pressure on governments to reopen the border at Dolno Dupeni.

### Objectives:

- To initiate a joint sporting event between the three countries;
- To highlight the Prespa Lakes basin's scenery and beauty;
- To stimulate local people, to raise awareness and bring pressure to re-open the border at Dolno Dupeni;
- To stimulate inter-institutional cross-border collaboration in the field of sports tourism (activities);
- To develop a tourist offer with unique multi-country experience;
- To market the event successfully and obtain positive PR;
- To improve international recognition of the Prespa Lakes basin as a unique cross-border destination;
- To extend an average length of tourist stays in the Prespa Lakes basin;
- To contribute to the increase of welfare/income of local people in the region.

### Obstacles and Impediments Likely to Affect Implementation:

Possible government opposition.

Raising sponsorship.

Need for effective organisation and marketing.

### Outcome/Results:

- Triathlon initiated as an annual event involving each of the three Prespa Lake countries, and both tourist and local participation;
- Overnight visitors attracted to the region;
- Positive press coverage;
- Initiation of cross-border inter-institutional collaboration;
- Promotional materials of event and event website;
- International promotion plan developed and implemented;
- Positive press coverage achieved;
- Contribution to the increase of tourism sector employment and revenue.



**Action Steps:**

- Identify key players in the field of sports tourism in the three countries;
- Agree concept and develop business plan including sponsorship;
- Initiate cross-border inter-institutional collaboration;
- Provide training and awareness raising for parties involved locally;
- Identify target markets, differentiating features and products;
- Initiate website and marketing;
- Manage event.

**Timeline:**

18-24 months

**Funding:**

US\$ 100,000

## Pilot project 4: Taste of Prespa TV programme

**Description and Motivation:**

The attractiveness of sustainable tourist destination relies on its ability to innovate and match the local culture, cuisine, resources and products with the aspirations of conscious visitors. Many tourists, tired of encountering the serial reproduction of culture and cuisine in different destinations, are searching for alternatives. Increasing competition in the cultural tourism market means that sights and basic services are no longer enough and that destinations must differentiate their products by transforming them into ‘sustainable experiences’ which engage tourists. Prespians from all three countries showing their guests how to prepare traditional fish, beans, and many other local dishes can become an example of how to engage tourists in unique culinary experience.

**Goal:**

The Prespa Lakes basin to become a unique culinary experience for tourists appreciating authentic food together with unspoilt nature.

**Objectives:**

- To develop high quality culinary tourist experience in the Prespa Lakes basin;
- Promote it through a three part TV programme to be aired on regional TV channels;
- To preserve tradition and increase women’s participation in sustainable tourism;
- To extend average length of tourist stays in the Prespa Lakes basin;
- To promote inter-cultural exchange and cross-border collaboration of the Prespa Lakes basin;
- To improve international recognition of the Prespa Lakes basin;

- To develop tourist offers which will help launching the Prespa Lakes basin to international sustainable tourism sales channels;
- To build capacity of local people offering culinary tourist experience;
- To contribute to the increase of welfare/income of local people in the region.

#### **Obstacles and Impediments Likely to Affect Implementation:**

Limited sources of financing.

Ability to sell idea to a TV company.

#### **Outcome/Results:**

Three part TV programme widely aired.

- Development of a tourist product based on culinary experience with at least one authentic dish from each of the three bordering countries (i.e.: traditional fish dish in Albania, beans in Greek Prespa and apple dishes from the Resen area);
- Extended average length of tourist stay in the Prespa Lakes basin;
- Inter-cultural exchange between the three Prespa Lake countries;
- Cross-border international promotion plan developed and first actions implemented (Video promotional materials – Book of Recipes of Prespa, website, and high-quality international events for promotion);
- Capacity building implemented for people providing culinary tourist;
- Increased local income.

#### **Action Steps:**

- Identify unique local dishes of the region (some of which are very special because of the isolation of people living in the mountains);
- Develop draft storey-board and commission TV company;
- Maximise resulting PR;
- Within a local cross-border initiative, develop Prespa culinary tourism products for niche international and domestic markets. Expand boutique offerings to capture - boutique experience:
  - Distinctive regional cuisine, simple village cuisine
  - Rural tourism
  - Culture and folklore
  - Distinctive food-processing and similar activities (i.e. traditional fishing)
- Introduce Prespa culinary tourism experiences into existing international tourism sales channels and conduct promotion campaign;
- Provide intensive capacity building program in key areas for successful preparation and serving of food, marketing and production of Prespa culinary tourism experiences.

#### **Timeline:**

24 months

#### **Funding:**

US\$ 200,000

**Pilot project 5:** Prespa lakes basin trilateral tourist map**Description and Motivation:**

A well designed tourist map is an essential promotional and visitor-servicing tool. At present there are at least three Prespa maps, each only covering one or two countries. There is no user-friendly tourist map of the Prespa lakes basin.

**Goal:**

To nurture cross-border cooperation and begin to create awareness of the Prespa Lakes basin as a trilateral tourism region.

**Objectives:**

- To produce a high quality Prespa Lakes basin tourist map;
- To encourage longer length of stay by illustrating what there is to do in the wider region;
- To illustrate the need to re-open the Dolpo Dupeni border-crossing;
- To provide accurate and current information on the wider Prespa Lakes basin;
- To assist tourists to the region;
- To raise the profile of the trilateral Prespa Park.

**Obstacles and Impediments Likely to Affect Implementation:**

Willingness of partners to cooperate.

**Outcome/Results:**

- High quality Prespa Lakes basin tourist map available in hard copy and on line.

**Action Steps:**

- Establish steering group;
- Draft detailed terms of reference for study;
- Invite tenders from competent design agents with relevant tourism and cartology experience;
- Score proposals and select most competent within budget;
- Brief company and closely supervise project execution.

**Timeline:**

6 months

**Funding:**

US\$ 30,000



*photo: Lj. Stefanov*





# Annexes

# 1. Review of existing and relevant strategies/plans/studies

## 1.1 Environmental strategies and studies

### 1.1.1 Prespa Lakes Basin Strategic Action Plan

In his review of progress on the 2002 Strategic Action Plan, Whalley (2009) notes that restricted access to data and poor communication among the three littoral states has led to differing interpretations of the priorities affecting the sustainable management of the Prespa Lakes basin; and that these views often reflect national, rather than trans-boundary priorities. The development of ecotourism was however identified as a common objective of both the Strategic Action Plan and the GEF which would enhance opportunities for the sustainable economic and social development of the local societies and the wise use of the natural resources.

### 1.1.2 Prespa Lakes Basin Strategic Action Programme

The Prespa Lakes Basin Strategic Action programme (2010) is an update of the 2002 Strategic Action Plan and summarises key environmental issues in the Prespa Lakes basin. It identifies co-ordinated actions that will be implemented in the next 15 years approximately. It notes that Prespa Park will develop a brand identity and that this brand will form part of a marketing programme for the tourism, organic agricultural production and other complementary economic sectors. It also notes however that increased tourism may be a threat to the area's ecosystems through increased numbers and inadequate services. This highlights the need for a responsible and sustainable approach to tourism development in the TSAP, clearly linked to consideration of environmental impact.

Key environmental issues to be addressed are defined as follows:

- Water quality and eutrophication due to inadequate wastewater treatment from human settlements and inappropriate use of fertilisers on agricultural land; organic pollution due to the inappropriate disposal of excess fruits; and hazardous substance pollution from inappropriate use of agrochemicals and industrial processes.
- Land management for agriculture and preserving forest cover,

and the lack of appropriate spatial planning procedures (particularly relevant to tourism);

- Fishery management to address depletion of native species.
- Loss of water level in Macro Prespa leading to changes in the shoreline habitat.
- Sediment resulting from inappropriate land management (agriculture and forestry), periodic flood events and changes in river regimes.

The draft 2010 Strategic Action Programme has four overall environmental quality objectives (EQOs) to address these issues, as follows:

- EQO 1: To preserve the ecological values of surface and ground water resources;
- EQO 2: Strengthening land-use management and planning;
- EQO 3: The conservation of Prespa Lakes Basin's biodiversity and habitats;
- EQO 4: To improve the livelihoods of the local communities by ensuring sustainable forestry, agriculture and fisheries.

'Cultural heritage and ecotourism' is identified under livelihoods within EQO 4.5. This calls for interventions as follows:

- The implementation of the trilateral tourism development strategy;
- The identification of investment incentives for small scale tourist related activities;
- Capacity building exercises on alternative tourism for all relevant stakeholders in the basin;
- Improving the recording of information related to number and origin of tourists to region to assist with future planning and to assess environmental impacts;
- Conservation of priority cultural sites;
- Improvements to road and municipal infrastructure to support local tourism development; and
- Private initiatives to improve tourist accommodation.

Tourism is seen as a supplementary livelihood option in the Strategic Action Programme, which envisages an economy primarily related to agriculture, forestry and fishing.

The Strategic Action Programme calls for the development of forms of tourism and products that contribute to the protection of the Prespa Lakes ecosystem. Circuit tours and complementary product development is sought promoting common historical and cultural heritage. Trans-boundary information and marketing, skills development, exchange of information and public participation are envisaged upon 'the creation of a regional tourism destination'.

#### Expected results:

- Programmes on the conservation of the cultural heritage in the Prespa Park area developed.
- Forms of tourism and their products that contribute to the protection of the Prespa Lakes ecosystem are fostered.
- Circuit tours and complementary product development promoting common historical and cultural heritage are designed and marketed.
- Trans-boundary tourism information and marketing, skill development, exchange of expertise .
- Public participation upon the creation of a regional tourism destination is ensured.

#### Actions on trans-boundary level:

- Policies, education and scientific research.
- Implementation of the trilateral tourism development strategy.
- Incentives for investments in the small scale tourism and especially alternative types of tourism.
- Capacity building on the alternative tourism for all the relevant stakeholders in the trans-boundary area.

#### Investments:

- Implement programmes on the conservation of selected priority cultural sites.
- Road and municipal infrastructure in support of the local tourism development.
- Private initiatives towards improving the tourist offer: accommodation capacities and complementary tourist products.

(2010, annex 2: 22)

### 1.1.3 Trans-boundary diagnostic analysis

The Trans-boundary Diagnostic Analysis Inception Report (Regional Environment Centre, 2008) outlines the process of data gathering and available resource material on the environment and economy in the three littoral states. It contains very limited information on tourism. It notes that

*The Prespa region has several significant cultural and natural features, archaeological sites and monuments, small traditional villages and sites of special ecological interest. However, the tourist attractions of Prespa remain relatively under-exploited, unknown and in a bad condition. Hence, promotion of conventional or alternative tourism seems to be essential for the economic development of the region and*



# 1 Review of existing and relevant strategies/plans/studies

*the preservation of its historical, cultural and ecological identity. In the former Yugoslav Republic of Macedonia, there is an expected increase in tourism over the next 20 years, which, however, is also mostly seasonal<sup>25</sup>. In Albania, the tourism sector is almost non-existent<sup>26</sup>, due to unfavourable economic conditions and lack of necessary infrastructure. Local development plans in Albania show an increased interest in the development of rural tourism (2008:15).*

It identifies key stakeholders as follows:

- The principle stakeholders in three littoral countries are their respective ministries which are in charge of the environment. In Albania this is the Ministry of Environment, Forests and Water Administration; in the former Yugoslav Republic of Macedonia, the Ministry of Environment and Physical Planning; and in Greece, the Ministry of Environment, Spatial Planning and Public Works and its regional offices.
- The regional authorities in Albania, the Regional Council of Korçë. Municipalities in the trans-boundary area are the communes of Liqenas, Proger and Qender Bilisht (in Albania); the Municipality of Resen (former Yugoslav Republic of Macedonia); and the Municipality of Prespa (Greece).
- Other related stakeholders which are NGOs, representatives of the private sector, church bodies, and local associations.

For a tourism strategy however engagement is also needed with the Ministries of Tourism and Culture in Albania and Greece, and their national tourism organisations, as well as the travel trade. In the former Yugoslav Republic of Macedonia the Agency for Promotion and Support of the Tourism, based in Struga, is the organisation which heads up the tourism industry; and the Tourism and Catering Department within the Ministry of Economy also has the policy role.

## 1.1.4 Rapid assessment of priority species and habitats in the Prespa Lakes basin

This assessment (DEKONS-EMA, 2009) confirms that Prespa Lakes basin is endowed with an exceptional biodiversity. The region has been recognized as a European and Global Hotspot of Biodiversity, not only

<sup>25</sup> *The national tourism strategy in fact seeks to address seasonality, but this will be challenging.*

<sup>26</sup> *Presumably 'the Prespa Region of Albania' is being referred to here: Regional tourism from within the Balkans to the Albanian coast is considerable and Albanian tourism is growing rapidly (see table 9).*

because of the sheer number of species and habitats present, but also due to their quality, rarity and conservation significance. The report points out that there is a conspicuously high level of endemic species: 54 animal species are unique to the Prespa watershed, 47 invertebrates and 7 vertebrates. 50 bird and 12 mammal species, 14 invertebrates, 8 fish, 3 amphibians and 11 reptiles are considered to be important according to international conventions and European Union (EU) directives.

There is no figure on the number of plant species in the Prespa Lake watershed: The rich plant diversity can be illustrated by very high numbers of endemic and inscribed species from the mountain regions. The Galičica mountain range represents the frontier between the Mediterranean and Continental floral environments.

The rapid assessment document prioritises species that are threatened, although economic values are also taken into consideration. For tourism purposes a different criterion needs to be applied, as threatened species often should not be exposed to the disturbance of tourists, even nature-loving ones. For example, Mountain Tea (*Sideritis raeseri*) has long been known locally. There is tourist interest in tasting it and it is for sale to tourists at some visitor attractions in the area. However, as it is threatened by over-harvesting, over-grazing, habitat loss and climate change, conservation rather than exploitation may be the more responsible policy approach until the species can recover and be managed effectively. The priority for nature tourism purposes needs to be on those species that are accessible, excite market interest and are not threatened (although they will probably be rare).

## 1.2 National tourism strategies and studies

### 1.2.1 The current TSAP

The current TSAP was submitted by LaPaz Group in April 2010. The document is structured in four sections as follows:

- Introduction;
- Background on Sustainable Tourism in Protected Areas;
- a proposed Sustainable Tourism Strategy ; and
- an Action Plan.

The document runs to 100 pages but references are made to it as ‘the first draft of the strategy’: A more detailed version was to follow. The document’s main weakness is that it fails to outline a clear and logical forward plan for

tourism development and investment, and the means of managing tourism in the future: In effect it is not a forward strategy<sup>27</sup>. It appears to have been written as a progress report rather than a strategy per se and does not meet the requirements of UNDP's terms of reference. None the less the document does illustrate that extensive local consultation has taken place, and the results of these consultations are outlined at annex 4.

## 1.2.2 Albania

Albania's Tourism Development Strategy 2002–2012 was drafted with the assistance of Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ), the German technical cooperation organisation. It was adopted by the Council of Ministers of Albania in 2003. It defines the following main types of tourism for Albania as the following:

- sun and beach tourism
- special interest tourism
- urban tourism / business and conference tourism

Cultural and nature-based tourism were considered under special interest tourism. The Prespa region of Albania was not given detailed consideration. The strategy proposed that Albania be positioned on the international tourism market as a coming tourism destination value for money packages, i.e. "all inclusive" (mass tourism). Sun and sand tourism were seen as attracting the main international tourist flows with developments on the Adriatic coast of big accommodation establishments suitable for inclusive packages.

This 2002 strategy was superseded by a more eco-friendly approach in 2005 with the publication of the Strategy and Action Plan for the Development of the Albanian Tourism Sector Based on Cultural and Environmental Tourism (Pratt, 2005). This was developed with the assistance of UNDP Albania and approved by the Council of Ministers in 2006. This document provides a clearer direction for a national tourism strategy oriented toward nature and culture-based tourism which positions Albania as an attractive destination for tourists seeking a unique experience. It provides an operational and action-oriented strategy for establishing Albania in international tourism markets. Albania's central theme for tourism development was to be "discovery". The marketing theme is a presentation of a broad cross-section of Albania's history, nature, archaeology, living culture, cuisine and hospitality. There is no specific mention of Lake Prespa (or of Lake Ohrid) but the strategy

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<sup>27</sup> A more detailed review of the draft TSAP was outlined in Progress Report 1 (September 2011)

does recommend that Albania should establish an accelerated process for establishing tourism plans in a number of identified priority nature areas with tourism relevance, relevance being based on the attractions themselves and their proximity to tourism centres (2005: 25). A further Tourism Sector Strategy 2007-2013 (Ministry of Tourism, Culture, Youth and Sport, 2007) was adopted by the Council of Ministers in 2008. This document was prepared with the aim of revising the Tourism Development Strategy 2002-2012 and harmonising it with the UNDP Strategy for Cultural and Environmental Tourism (2005). In 2010 UNDP Albania supported the production of another national tourism planning document, the Albania Cultural Marketing Strategy (Tourism Development International, 2010): In this report Prespa is mentioned only in the context of the need to address the country's significant litter problem, which the strategy points out will significantly undermine the potential for the development of nature tourism in Albania (2010: 26). Prespa is not listed as a 'top tourism destination' by the Albanian National Tourism Agency, although Prespa National Park is listed on the agency's website < <http://www.albaniantourism.com/>>.

### 1.2.3 The former Yugoslav Republic of Macedonia

The Master Plan Study for Tourism in the Republic of Macedonia was produced in 2003 but was never implemented. In 2008, a new National Tourism Development Strategy 2009-2013 was drafted for the Ministry of Economy of Macedonia, supported by UNDP and UNWTO. In April 2009, this Strategy was reviewed by UNDP.

The draft National Tourism Development Strategy 2009-2013 (2009) presents a comprehensive overview of the key problems and opportunities facing the Republic and the potential of Prespa. In particular it says the following:

*The Prespa Park region has significant tourism potential and is considered as an ecosystem of global significance. There are a number of tourism projects underway in the region that will improve the natural heritage in the region. Cross-border implementation on an integrated basis is vital to its future (2009: 158).*

Challenges are noted including the following:

*Outside of Skopje, Ohrid, Struga and Mavrovo there is a shortage of quality accommodation. Only 20 per cent of accommodation, nationally, (14,000 beds) is in hotels but their accommodation categorisation criteria and its implementation is not aligned to international standards and there is only a limited presence of*



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*international accommodation brands, which can help stimulate higher operating standards. Monastery accommodation is a potential tourism asset if publicised effectively. Workers' and children's accommodation is significant in quantity but mostly in very poor condition with unclear ownership and not suitable for the tourist market while auto camps and camp sites are well below European standards. Up to 50 per cent of accommodation is in the unregistered and unofficial market. The spa tourism offer is of low quality and would need complete renovation or reconstruction to match European spa and wellness product standards. National Park tourism offer is at a low development level but has good potential as a product and as a revenue source for the parks. Lake Ohrid has reached its carrying capacity in the peak summer months, but has significant room capacity at other times. Lakes Prespa and Dojran have development potential, but this needs to be strictly controlled to avoid the environmental errors of the past. (2009: 56).*

The strategy considers lake tourism in detail and notes the following regarding Lake Prespa in particular:

*The continuous reduction of the water level of Prespa Lake over the years has adversely affected the state of the floating vegetation and faunal communities in the littoral zone of the lake. The presence of large quantities of organic silt on the lake bottom accelerates the process of eutrophication, which manifests itself with the appearance of phytoplankton blooms during the summer period. With it the water quality and visibility is deteriorating which have a negative influence on tourism in the area. (2009: 76).*

This makes clear that the tourism potential of the Prespa Lakes basin is negatively affected until this issue is successfully addressed (as the UNDP-GEF project and the Governments seek to do), however regardless of this the area still has great natural beauty.

The national tourism development strategy notes that occupancy at Lake Ohrid and Lake Prespa is high for only a very short summer season, though boosted to a certain extent in the shoulder season by conference business. It notes that for Prespa specifically cross-border implementation on an integrated basis is vital (2009: 76).

In 2011 the Ministry of Economy commissioned a revision of the National Tourism Development Strategy under the Business Environment Reform and Institutional Strengthening (BERIS) project of the World Bank (PLANETH, 2011). The purpose of the review was to define a strategic and operational vision for tourism in the country, by defining realistic

tourist products which could be actioned. Lake tourism is defined as Priority Cluster 1 (the pilot area for cluster 1 is Lake Dojran in the South East). Cultural tourism, mountain tourism and rural tourism are also prioritised. Prespa has potential to fit in with all these priorities.

Under lake tourism Prespa is ranked against Lakes Dojran and Ohrid as illustrated in table 11.

**Table 11.** *Tourism-related comparison of Lakes Dojran, Ohrid and Prespa*  
Source: PLANETH (2011: 80)

	Djoran	Ohrid	Prespa
General tourist state of development	• • •	• • •	•
Image and renown at international level	-	•	•
Image and fame at regional level	• • •	• • •	• •
Tourist resources and potential	• • •	• • •	• • •
Engagement of local actors	• • •	• •	•
Accessibility	• • •	• •	•

While the rankings can be questioned (particularly regarding access to Ohrid following the privatisation of its airport), the study highlights weaknesses regarding (Macro) Prespa, but also potential.

In terms of marketing, Lake Prespa is highlighted on the national tourism portal <<http://www.macedoniatourism.gov.mk/>> and on other sites such as <<<http://www.exploringmacedonia.com/>>>.

## 1.2.4 Greece

Tourism is a very important sector in the Greek economy supporting tens of thousands of jobs. Domestic tourism has been badly hit by recession; however the Government sees tourism as vital to the country's recovery from its current economic problems. Privatisation is high on the Government agenda, but confusion as to precise state ownership of lands has slowed the process. City breaks, coastal and island tourism predominate in terms of tourism product. Greece's ten year strategy for tourism aims to upgrade, diversity and enrich its tourism product (OECD, 2010). The new tourism strategy is aimed at the promotion of all parts of Greece and the long-sought extension of the annual tourism season to year round. Countryside tourism and touring are key themes in the promotion of the diversified Greek product.

The official website of the Greek Tourism Organisation <[www.visitgreece.gr](http://www.visitgreece.gr)> highlights Prespa under its WebPages for forests, lakes and bird-watching. It is also listed in the current Greece band marketing brochure on Touring under the heading of 'Greece's Macedonia Region' (Ministry of Culture and Tourism, Greek National Tourism Organisation, 2010: 5). Western Macedonia is a geographically isolated region, a fact that has

had a negative impact on the area's tourist development in contrast to the "sun-sea" pattern that has dominated Greek tourism development. Nevertheless, current Greek tourism development strategies recognise recent global trends underline a need to seek something different, something authentic and something green<sup>28</sup>: It is exactly that difference and authenticity that characterizes the region of Western Macedonia: The overall region has two National Parks, eleven NATURA areas of immense natural beauty, three ski centers, eight lakes (seven natural and one artificial), gorges, rivers, interesting geological formations, two world trekking paths, remarkable traditional settlements, a great number of archaeological sites and a plethora of Byzantine monuments of international interest. Western Macedonia is seen as an the ideal destination for mountain tourism, both for sport and adventure, such as winter ski, mountain climbing, kayaking, motor cross and mountain bike competitions.

## 1.3 Regional tourism-related strategies and marketing initiatives

### 1.3.1 GIZ Regional Tourism Cooperation Programme

Deutsche Gesellschaft für Internationale Zusammenarbeit GIZ has a long history of supporting the region. The first phase of support for Ohrid-Prespa ended in September 2003 and included financing of micro-projects of the region, development and promotion of eco- and agro-tourism. A website <[www.magiclakes.com](http://www.magiclakes.com)> was launched (no longer operative) which contained useful information and news, and a brochure on Prespa and Ohrid in five languages. In the second phase a tourism brand and strategy for the Ohrid-Prespa Region was developed. GIZ continued supporting ecotourism, including promotion activities, and 'support for the development of a regional tourist agency'. The marketing covered the municipalities of Ohrid, Struga, Resen, Debarca and Vevcani and had the slogan ' Ohrid-Prespa Region: Feel Nature and Culture'. The booklet Ohrid-Prespa Region (GIZ Regional Economic Development Programme, 2008) is a very useful publication featuring 90 attractions and events, twelve of which are in the Resen region. Clearly the issue of the sustainability of technical support arises It is not clear who is taking this forward and ensuring the publication stays updated and in print.

<sup>28</sup> <<http://www.alternativegreece.gr>>

Another GIZ Albania-based initiative is ‘Heritage Trails in the Region of Ochrid and Prespa Lakes’ was delivered through the Heritage Trails Association, Pogradec. This is a useful publication describing 40 attractions with photographs.

### 1.3.2 Center for Development of Pelagonija Region

The Center for Development of the Pelagonija Planning Region (CRPPR) is currently getting involved in tourism marketing, in addition to seeking inward investment. Brochures on the Bitola-Reisen region are being prepared, including a church and monastery trail, and marketing material covering ‘the Pelagonia region’. A website <<http://www.visitpelagonia.mk/>> has been launched. The planning region does not include Ohrid (whereas the 2010 National Spatial Strategy indicates an Ohrid-Prespa region, which makes more sense in tourism terms).

CRPPR’s Program for the Development of the Pelagonija Region 200-2015 includes detailed proposals for tourism under priority 4.6. Tourism investment projects in the Prespa region which CRPPR is currently listing are as follows:

- A ‘Finnish village’ at Dolno Dupeni<sup>29</sup>;
- Tourist and restaurant facilities in Pretor, Stenje, Konjsko ‘and other locations’.

### 1.3.3 Spatial Plan of the Ohrid-Prespa Region

This is an important Ministry of the Environment and Physical Planning document for the former Yugoslavian Republic of Macedonia, but the CRPPR approach above illustrates a lack of ‘joined-up government’ as it puts Resen Municipality in another region. The spatial plan’s tourism objectives are as follows:

- The valorization of the tourism offer from the point of view of including all available and potentially available resources;
- Intensifying the marketing activities for the affirmation of the Ohrid-Prespa region as a tourist destination of international character;
- Broadening the tourist offer and making it more accessible throughout various networks;
- Establishment and envisaging of tourism expenditure as an indicator of tourism development;

<sup>29</sup> A new-build log cabin development: It is not clear what market research supports this development concept.



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- Including the natural and cultural heritage in the tourism offer; and
- Differentiation of the priorities for tourism development.

The plan highlights the importance on environmental impact as a primary consideration in tourism planning and refers to the need to examine 'tourism carrying capacity' (see chapter 3). Like the CRPPR document above, the spatial plan is short on specific detail for future tourism development and its locations. It suggests the following:

*The complex tourist offer of the region, offers possibilities to develop a variety of tourism types: lake, mountain, urban, health, eco-tourism, hunting, fishing, rural tourism, transit tourism and many others... Particularly significant for the region are the opportunities for mountain climbing, hiking, educational and recreational activities, bird watching, animal watching, sunbathing, ski, alpinism, cave tours, herbal activities, rural activities, alpine-ski running, hunting, participation in traditional food production, recreational and rehabilitation activities, sports fishing, flying with helicopters, parachuting and para-gliding. (2010: 43).*

The plan suggests that there will be 500,000 tourists visiting the region by 2020 generating 3.2 million bednights and staying an average of 6.6 days<sup>30</sup>. An additional accommodation capacity of 20,000 beds is projected, based on an annual increase of 3.5 percent.

## 1.3.4 Prespa/Ohrid Euroregion

The Prespa/Ohrid Euroregion has not yet been formally established, owing largely to unresolved bilateral issues between Greece and former Yugoslav Republic of Macedonia at the national level. The Prespa/Ohrid Euroregion Council and its constituent associations on the three sides of the borders have however met on a number of occasions starting in June 2005. The council made up of local and regional authorities and NGOs has been involved in the elaboration of draft Euroregion development priorities. Secretariat services were provided by the EastWest Institute. These priorities include higher education and NGO networking. EastWest Institute Cross Border Collaboration Small Grants programme also funded the development of cross-border tourism packages in 2006. However these were not taken up by tour operators.

<sup>30</sup> These targets are optimistic: Greece achieves an average length of stay of 5.32 days from international visitors. The current average length of stay for the former Yugoslav Republic of Macedonia is 2 days.

### 1.3.5 EU Prespa Local Quality Standards Project

The EU INTERREG/CARDS Programme for the Adriatic Region introduced a “Prespa Quality Tourism’ brand and commenced the development a database and mapping system for Resen region. Some attractive literature on ecotourism product was produced for Resen Municipality including a good map for tourists and an accommodation booklet with high quality photos. The project sought to introduce quality standards similar to those applying in Greek Prespa, but failed in this regard. Similar to the GTZ project, effective capacity enhancement and project continuation following hand-over appears to be a concern. Little use has subsequently been made of the material developed.

### 1.3.6 Transnatura

This is an important Ministry of the Environment and Physical Planning Transnatura <[www.transnatura.gr](http://www.transnatura.gr)> is an initiative of the Cultural Triangle of Prespa which brought together the ecotourism societies of Grammos and Prespa with the ecotourism society of Vitsi. It covers the eight lakes of lakes Vegoritida, Zazari, Petron, Himaditida in the region of Amideo, the two Prespa lakes, the Arenas and Gistova (the highest lake in Greece (2350 m). The area covered includes the protected areas of the National Park of Prespas, the cross-border Park of Prespas and the regions Natura 2000-Grammos and Prespas.

### 1.3.7 SNV-Korçë Destination Management Organisation action plan

SNV Netherlands Development Organisation assisted in the development of four action plans for the Korçë region of Albania, including the Albanian Prespa area. A destination management organization (DMO) has been set up covering the wider district which is actively targeting trans-boundary tourism, working with Ohrid and Thessaloniki airports. The National Park of Prespa is highlighted in the DMO website <[www.visit-korce.com](http://www.visit-korce.com)>.

### 1.3.8 Prespa Lakes Investment Region

This was a Eurochambers PARNERS II project with Italian aid. It aimed to do the following:

- To arise a common awareness among institutions and enterprises

of the Prespa Lake Region as an integrated investment destination (with particular care to tourism and agro food);

- To transfer know - how to potential and actual operators in rural tourism and agrofood (fruit) development;
- To promote “on line” and “off line” the Area in view of enhancing its investment capacity.

The initiative linked Chambers of Commerce in the former Yugoslav Republic of Macedonia, the Union of Chambers of Commerce in Albania, and the Commerce and Industry Chamber of Trieste in Italy, and suggested the development of a regional brand to be used by a trans-boundary cluster of apple growers tourist accommodation facilities. It was based on Italian experiences in organization of individual apple growers, manufacturing interests and exporters. It was expected that in the area of tourism, transfer of know-how would be established in the development of rural tourism, online promotion of the region through establishment on an on-line portal and promotion of the region as one brand. Further more, tour operators in Albania and the former Yugoslav Republic of Macedonia would work together on the classification of accommodation. The budget of this initiative was around US\$ 17,000.

### 1.3.9 UNDP Socio-economic studies, Albania

Eco-tourism and family tourism concept are recommended as an appropriate entry point for a sustainable economic development in the context of Prespa National Park in Albania. A series of recommendations were made as follows (Chazee, 2009):

- Signboards along the road from Korça to Macro and Micro Prespa, including village name and main points of interest.
- Display information leaflets in Korça hotels, guesthouses and local tourism agencies.
- Survey and identification, in Macro-Prespa, of zoning for appropriate family tourism concept.
- Proposal of architecture design of tourism oriented family houses or bungalow in line with traditional house style.
- Capacity building and training in visitor centres.
- Upgrade visitor centres to communal centres for information and local initiatives.

The study points out that tourism potential is undermined by its solid waste problem. The total overnight stay in Albanian Macro-Prespa was estimated at 500 nights per year.

A second study (Spitaler,2008) confirmed that ‘neither the villages around the lake, nor Racicka is prepared for overnight stays’ and recommended

tourism support focus on enhancing basic competence and improving mountain ranger services. In another UNDP-GEF study Methou (n/d) also confirms this:

*basic public infrastructures and services have to be planed, built or improved, maintained and operated (drinking water supply, waste management, sewage system, access, market place, phone, internet, etc.).*

UNDP also undertook a feasibility study for a Nature Capital Resource Centre and Visitor Centre in the Albanian part of the Prespa watershed which is currently under construction. This will do the following:

- Provide general information on Prespa Ecosystems and population, habitats, culture, flora and fauna based on available research already made;
- Display, sale and/or production of detailed Prespa maps with site, hiking, hotel, guesthouse and restaurant information;
- Updated list and contact of Prespa service providers;
- Display of leaflets, information products;
- English course facility in Prespa for local communities including tourist service providers, and Park staff;
- Display of existing research information from studies;
- Networking with other Info centers;
- Display and information of Prespa Management Plans and Local Development Plan;
- Service/information/capacity building to prepare and access project/small grants;
- Services and training to ensure minimum quality standard in accommodation and food;
- Computers facilities for association and students;
- Organization of exhibitions, in networking with other centers, regional schools, arts and cultural organizations;

### 1.3.10 SNV Prespa Area Tourism Action Plan, Albania

This study's the priority identified objectives are:

- improving tourism infrastructures,
- improve tourism attraction, events and activities,
- improve tourism hospitality, marketing and promotion.

The priority identified actions are:

- national and rural road improvement,
- protection of natural environment from illegal activities,
- keeping livestock away from shore and house areas,



# 1 Review of existing and relevant strategies/plans/studies

- improve community awareness on the importance of tourism industry and
- development of promotional and marketing material.

## 1.4 Other relevant strategies and sources

### 1.4.1 UNESCO

The Government of Greece added the Prespa Lakes region to the UNESCO Tentative World Heritage List in 2003. The citation points out that the area is characterized by outstanding natural beauty and has been inhabited without interruption from antiquity to the present day, and that it contains a higher degree of species biodiversity than any corresponding surface area in Europe. It is described as a unique landscape of outstanding natural beauty that includes a wealth of monuments from the Byzantine and post-Byzantine period. The citation suggests that the uniqueness of this monument lies in the interaction between man and nature and in particular in the use of natural caves to construct hermitages by the monastic community which settled here between the 13th and 18th centuries. This citation also refers to the trans-boundary element.

### 1.4.2 USAID National Competitiveness Report

The United States Agency for International Development (USAID) commissioned a competitiveness report for the former Yugoslav Republic of Macedonia from J.E. Austin Associates (2001). This report notes that the well-preserved countryside offers excellent possibilities for rest and recreation and contains possibilities for fishing and hunting, mountain climbing, mountain biking, and other alternative tourism activities. The report notes that significant efforts would be needed in product diversification, awareness, marketing and promotion activities and that new (private) owners of the tourism facilities will have to invest significant resources to upgrade the facilities and services, to meet competitive quality standards.

### 1.4.3 Prespa Park trademark

The WWF “One Europe, More Nature (OEMN)” programme was involved in a pilot project in the trans-boundary park area. The project’s

overall goal is to reduce the environmental impacts of intensive agriculture, primarily from Greek bean farmers, by attempting to introduce ecologically-friendly agricultural practises connected with the special environmental needs of the area.

The project mechanism was a product labelling scheme to commercially highlight the high environmental quality and origin of the products through the use of a 'Prespa Park Products' label. Prespa 'One Europe, More Nature' was implemented with the Society for the Protection of Prespa (SPP). The long-term goal of the project is the protection of the Prespa Park's natural environment through the establishment of a certification scheme which would contribute to 'friendlier agricultural practices', possible acquisition of higher product value and possible improved access in the domestic and international market.

#### 1.4.4 Prespa Park Communications Strategy

Under the Developing Communication, Education, Participation and Awareness (CEPA) programme of the Ramsar Convention of Wetlands, a Prespa Park communication strategy has been developed. This is taken forward by Seizona (2009). It is confirmed that

*there is no doubt that emphasis in communications should be placed on informing and sensitising the inhabitants of the broader Prespa region. (Seizona, 2009:17).*

The following communications objectives are outlined:

##### General Objectives

- To raise awareness about the existence of the Prespa Park.
- To raise awareness about specific subjects of importance to the Prespa Lakes basin.
- To obtain the support of public opinion on the necessity for better environmental resource management.
- To inform specific stakeholders about best practices in their sectors.

##### Specific objectives:

- To raise the visibility of the Prespa Park.
- To create and maintain a close relationship with mass media on behalf of Prespa Park.
- To develop partnerships between the public and private sector which will allow them to further generate a positive awareness about the Prespa Park.

# 1 Review of existing and relevant strategies/plans/studies

- To encourage an efficient partnership between the stakeholders in all three littoral states.
- To make available all relevant information about best practices to all stakeholders whether in agriculture, services or some other sector.
- To ensure visibility of decisions and actions taken by the institutions involved in the management of the Prespa Park.
- To ensure visibility of results and findings obtained by the Prespa Park.
- To promote the social and economic impact of better environmental resource management.

The slogan developed under the branding guidelines is as follows:

*“Three Countries, Two Lakes, One Future - Τρεις Χώρες, Υπό Λίμνες, Ένα Μέλλον - Три Држави, Две Езера, Една Иднина - Tre Vende, Dy Liqene, Nje e Ardhme”*

The website recommended as the key communications tool in the communications strategy is <[www.prespapark.com](http://www.prespapark.com)>. This is a vital tool for tourism marketing, as the vast majority of tourists internationally now use the Internet as their primary means of research. At present the website is not operational and there is no link to an alternative website. A Google search on <Prespa> yields relatively little tourism marketing material although SPP is given good coverage.

## 1.5 Conclusions and key issues arising

It is clear that considerable research has already been undertaken regarding the region, and that there are environmental initiatives underway. There have also been a very significant number of tourism-related studies and initiatives but their sustainability appears questionable. In fact some areas seem to be over-studied in tourism, with limited actions resulting. Overall there are limited forward proposals for new product development which will be market-led, and an emphasis on servicing (limited numbers of ) tourists through more information centres.

It is also clear that despite unique environmental assets and various donor projects, there are currently few tourists visiting the Prespa Lakes basin outside of July and August. The area is relatively unknown as a tourism destination internationally, and its image (and hence potential) is threatened by eutrophication of the lake and reduced water levels. Seasonality is a significant challenge.

In terms of future regional development and marketing, the Ohrid-Prespa Euroregion combination covering the three countries appears to present the most interesting and realistic option for a sustainable tourism destination with critical mass of product; It has strong environmental and heritage assets, a sufficient bank of accommodation and enough bednights and businesses to support forward marketing and destination management in a self-sustaining way. Being a region on the periphery (within and without) the EC, it also is well placed to receive funding if convincing proposals are put forward for tourism and economic development. As an area with very important ecosystems it is also well placed to receive green climate change funding and other environmental support.

A significant issue arising is the multiplicity of largely defunct donor-backed tourism initiatives which are characterised by a lack of sustainable follow-through once funding ends. Insufficient attention appears to be being paid to embedding tourism-related initiatives in empowered organisations which can deliver leadership, genuine collaboration and the drive to continue and build on what donor projects start. Interventions have tended to be small scale and not sustained. As one consultee put it regarding tourism: “There are plenty of plans and initiatives, but there is a huge gap when it comes to implementation”.



## 2. Assessment and evaluation of the current status of the tourism sector

### 2.1 National economic backgrounds

Overall economic performance is a key determining factor for tourism demand in the region, particularly inter-regional demand (by far the largest sector). The current national economic picture for the three states is summarised below:

Albania is making the difficult transition from a closed, centrally-planned state to a more modern open-market economy. After initial growth macroeconomic indicators declined to about 3 per cent in 2009/10. Remittances, a significant catalyst for economic growth have declined from 12-15 per cent of GDP to 9 per cent in 2009. (Most remittances come from Albanians residing in Greece and Italy, now also in recession). Energy shortages, bureaucracy and inadequate infrastructure contribute to Albania's poor business environment. Foreign direct investment (FDI) is among the lowest in the region, but a programme of fiscal and legislative reform is underway. Poor planning control has had major long term negative impact on international tourism potential, particularly in and around the Adriatic towns. Electricity supply is constrained, despite the opening of a new power plant in Vlor. While economic progress is evident in some of Albania's cities (including Korçë) rural areas remain very poor with very limited government services.

At independence in September 1991, the former Yugoslav Republic of Macedonia was the least developed of the Yugoslav republics. An absence of infrastructure, sanctions, and a Greek economic embargo over the dispute about the country's constitutional name hindered economic growth until 1996. Since then, Macedonia has maintained macroeconomic stability with low inflation, but it has so far lagged the region in attracting foreign investment and creating jobs, despite making extensive fiscal and business sector reforms. In the wake of the global economic downturn, the country has experienced decreased FDI. However, as a result of conservative fiscal policies and a sound financial system, in 2010 the country received slightly improved credit ratings and it has been recommended three times that it commence the EU 'candidate country' process<sup>31</sup>. Cross-border trade from Greece is important, particularly in the Bitola region.

<sup>31</sup> Recommendations vetoed by Greece

In Greece the public sector accounts for almost 40 per cent of GDP. Tourism provides 15 per cent of GDP and immigrants (especially from neighbouring countries) make up nearly one-fifth of the work force, mainly in agricultural and unskilled jobs. The Greek economy contracted by 2 per cent in 2009, and by 4.8 per cent in 2010: In 2009 Greece's budget deficit reached 15.4 per cent. Very unpopular austerity measures reduced the deficit to 10.5 per cent of GDP in 2010 but the country's economic crisis continues to worsen. Public debt, inflation, and unemployment are above the euro-zone average while per capita income is below; unemployment rose to 12% in 2010. Under intense pressure by the EU and international market participants, the government has adopted a medium-term austerity program that includes cutting government spending, reducing the size of the public sector and improving competitiveness. The Greek economy is at present in turmoil, with uncertainty regarding EU 'bail outs' and continued membership of the European single currency zone affecting future prospects.

## 2.2 Regional economic backgrounds

### 2.2.1 Overview

In the Prespa Lakes basin specifically the economy is almost entirely rural. The only city in the basin is Resen with approximately 16,500 inhabitants and 5,000 households. The main characteristic of the basin in all three countries is a scattered population of mainly small villages.

### 2.2.2 Albania

Less than 5,000 people engaged mainly in subsistence farming and fishing, live in Albanian Prespa, where the terracing of the former collective agricultural system has been abandoned and basic infrastructure has deteriorated. Communities remain under strong economic pressure to over-exploit natural resources, evidenced by the degraded forest cover. Most of the households today are engaged in labour-intensive agriculture (farming, and livestock production) supplemented by some fishing. Poor farming methods, timbering, overgrazing and soil erosion have damaged severely some gently sloping to sloping soils, many of which are today abandoned to brush. Beekeeping and (in particular) firewood collection also supplement incomes. Tourism is not significant but some of the better off families have developed restaurants and homestay ([WWF, n/d).

## 2.2.3 The former Yugoslav Republic of Macedonia

Fruit-growing and fishing are the most important economic activities in the basin on the former Yugoslav Republic of Macedonia side, centred on the municipality of Resen. The annual yield of apples is around 70,000 tons, and the most famous type is Idared. There is also a small manufacturing base. The main apple harvest is in October and there is a local festival to celebrate it each year. Agriculture is the dominant source of income. The pollution load of the lake both here and in Greece is however largely caused by run-off of agricultural chemicals and fertilizers.

This is the most densely populated part of the basin, with over 17,500 inhabitants living in some 40 settlements. Strong rural-urban migration is however resulting in an ageing and declining population (WWF, n/d).

## 2.2.4 Greece

Following the implementation of the 'Kallikrates Plan' (reforming the 1997 administrative division of Greece), the Municipality of Prespa, which belongs to the Western Macedonia Regional Authority based in Kozani, has been enlarged. The new municipality arises from the merger of the existing Municipality of Prespa with the Community of Krystallopigi. The area of the new municipality is just over 50,419 sq km and has a population of 2,511 residents according to the 2001 census. The enlarged municipality, which is based in Laimos, has been allocated new responsibilities in a number of crucial sectors such as the environment, education, sport, social provision, planning and employment creation, however it has a staff of only thirteen.

Rural depopulation and unemployment characterise this region in Greece. 75 per cent of the population in the Greek sector (19 villages) continue to rely on agriculture, especially mono-cultivation of beans, for their livelihoods. Prespa Municipality is the most sparsely region of Greece with only 3.05 inhabitants per hectare. Out-migration and second home ownership add to the challenge of peaked summer seasonality and non-viable local services. Tourism is however seen as an alternative means of income generation and there has been fairly extensive development support for the tourism sector through EU programmes.

## 2.3 Access

### 2.3.1 Air

St Paul the Apostle Airport in Ohrid is the closest air access point to the region. It has recently been privatised and is becoming more active in regional marketing, especially for charter traffic. Thessaloniki and Skopje international airports are also within three to five hours' drive of the Prespa lakes.

### 2.3.2 Rail

Bitola connects with national and international rail networks, although for tourism traffic roads are currently more popular.

### 2.3.3 Road

The closed border crossing at Dolno Dupeni is a significant barrier to trans-boundary cooperation and to tourism. It results in a 150 km diversion via Bitola and Florina to reach Greek Prespa from Resen. Roads along the lake shores are mostly in a reasonable condition except in the South West corner and in mountain areas. Where poor roads exist, they restrict overall tourism potential but can still have use as hiking trails. There are public bus services to most parts of the region, but on a restricted basis and with no touring routes.

With the opening of the Via Egnatia Odos highway the access route to Greek Prespa has been made easier, reducing driving times from Thessaloniki to about three hours. The Via Egnatia Odos is 670 km long and spans the entire expanse of northern Greece from Kipoi/Alexandroupoli on the Turkish border to the port of Igoumenitsa in the west passing through the provinces of Thrace, Macedonia and Ipeiros. Nine northbound routes linking Greece with the border crossings to Albania, the former Yugoslav Republic of Macedonia, Bulgaria and Turkey are in various stages of construction, the official opening took place on May 30th 2009 and travelling times between northern Greece's main cities have been dramatically reduced. This is an important opportunity for the Prespa region, making Thessaloniki airport much more accessible. However as Ohrid and Thessaloniki develop as regional hubs there is a danger that the Prespa Lakes basin will be bypassed altogether if the road along the Eastern shore of Macro Prespa is not reopened to cross border traffic.



## 2.4 The Prespa Lakes

Both Prespa lakes are set in spectacularly beautiful mountain landscapes, virtually unspoilt by modern interventions and offering outstandingly beautiful scenery in all directions, and incredibly rich biodiversity. This biodiversity is recognised as being of global importance, and Prespa's landscapes are an outstanding asset for tourism, and for the people of the three countries. The essence of sustainable and responsible development is to ensure that this ecosystem is passed on undamaged to future generations.

The condition of the lakes themselves is also fundamentally important for the tourism potential of the area, especially in terms of water-based tourism which was the traditional tourism product of the lakelands in the past in Yugoslavia, and for the future possibility of lakeside tourism development.

Modern agriculture and inadequate waste disposal systems have however taken a severe toll on lake water quality. In terms of eutrophication Micro Prespa Lake is categorized as eutrophic<sup>32</sup> (with high levels of nutrients-nitrogen and phosphorus mostly caused by modern agricultural practices) and Macro Prespa Lake is still categorized as mesotrophic (with lower levels of nutrients compared to the eutrophic stage) although the recent monitoring investigations confirm that a eutrophic stage for this lake is imminent: There was a major algal bloom on Macro Prespa in 2011. Lake Ohrid is oligotrophic with much clearer water, although nutrients are rising here also.

Receding water levels also made the lakeshore areas less pleasant for swimming, leaving former shore-side tourism facilities somewhat stranded. In 2011 however there was a significant rise in water levels. The causes for rising and falling water levels relative to rainfall and use of ground water are still being studied. Based on archaeological remains it seems that water-levels were considerably lower at certain periods in ancient times, possibly due to rainfall being retained in more densely forested surrounding lands. Sedimentation from run-off, again mostly due to deforestation, is also a problem, as is the disposal of organic waste (human waste and unsold apples in the autumn). These are all issues which the UNDP-GEF Prespa Park project is primarily concerned with addressing. They illustrate the fundamental importance of better environmental stewardship to the tourism (and hence economic) potential of the Prespa Lakes basin.

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<sup>32</sup> In general, water bodies are classified according to the levels of nutrients (trophic features), thus called eutrophication, in three categories: oligotrophic – poor with nutrients, mesotrophic – relatively rich with nutrients and eutrophic – very rich with nutrients. There is legislation with prescribed threshold limits for the nutrient values used for categorization of the water bodies. (Source: UNDP-GEF project).

## 2.5 Services for tourism

In terms of utilities, as indicated above there is a need for adequate sewage facilities, organic waste disposal systems, and of water treatment facilities (filter beds etc.) to remove chemicals from watercourses carrying agricultural run-off, if the tourism potential of the region is to be fully realised. The absence of these facilities is a barrier to water-based tourism development and to tourism generally, although some new sewage treatment facilities have been provided. Education of the agricultural community regarding responsible environmental management in agricultural techniques and safeguarding of ground water is a key need. These are issues which the UNDP-GEF Prespa Park Project has already highlighted and is seeking to address.

The area also suffers from infrastructure draw-backs common to many rural areas: poor minor roads, patchy mobile phone coverage, limited Internet access, few healthcare facilities, limited general retail and banking services and limited access to further education. However remoteness and lack of development will appeal to certain, selected (and limited) tourism segments, provided fundamental services are in place (refuse systems, value-for-money accommodation of a good standard, clean water and communications). The lack of municipal services in Albanian Prespa is however particularly severe. Solid waste is not being collected and water supply and sewage disposal are significant barriers to tourism development which the municipality must address. The main access road from Korçë to Resen has however been improved. The network of information centres around the lakes is improving also.

## 2.6 Main tourism products at present

### 2.6.1 Present tourism product in Albanian Prespa

In Albania the main tourism product currently being utilised is primarily based around the needs of domestic market. Albanian Prespa's tourism potential is however very seriously undermined by the lack of services and systems for solid waste disposal, water supply and sewage disposal. The villages are in a completely unacceptable condition for tourism promotion with garbage dumps at village peripheries<sup>33</sup> and large quantities of plastic waste blowing around the fields. A second unsolved

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<sup>33</sup> A problem also in evidence in the former Yugoslav Republic of Macedonia villages.

problem is the sewage water treatment of the twelve villages inside of the Albanian Prespa National Park. This problem goes hand in hand with the lack of sufficient drinking water supply. Inadequate heating and lack of regular electricity supply limits tourism potential in guesthouses to summertime only. Until the municipality and the communes get their act together to address these issues (which are not insoluble) they are not in a position to develop tourism seriously.

### **Restaurants – domestic tourism**

Tourism is mostly day-trip-based (excursionist) rather than overnight tourism. It involves visits to the area's simple restaurants in fishing villages to eat local food, especially Prespa carp. Hunting trips, although illegal, are part of the domestic tourism scene. Fishing can also be arranged.

### **Lake excursions**

Boat trips to Mai Grad Island or to hermits' cave churches on Macro Prespa can also be arranged with local boatmen, and this is growing in popularity thanks to coverage in guidebooks and marketing by Korçë DMO.

### **Other**

There is some overnight tourism in guesthouses and very basic one star hotels, again mostly domestic tourism, but also some long-stay tourism related to ongoing archaeological excavations in the area and National Park and NGO work. Bird-watchers visit Mali Grad island in the spring and summer and the hermitages attract special interest and culturally-orientated visitors.

## **2.6.2 Present product in the former Yugoslav Republic of Macedonia areas of Prespa**

### **Beach and lake tourism**

The tourism product on the Macedonian shores of Macro Prespa at present is showing significant evidence of market failure, with poorly maintained beaches, largely abandoned caravan and camping sites and hotels in receivership or closed. There are a number of reasons for this, including the following:

- The developed tourism product mostly dates from former Yugoslav times when access to the Albanian coast was not possible and Prespa Lake was a popular bathing and holiday location in summer. Today it is easier for the domestic tourist to travel by car to the Adriatic or Greek coasts where more facilities are available.
- Water quality has deteriorated considerably mostly owing to the use of fertilisers and pesticides in apple cultivation, culminating

in a major algal bloom in the summer of 2011.

- Water levels drop in the lake in some years, leaving unsightly areas exposed.
- Beach facilities are basic to non-existent whereas consumer expectations have risen.
- New markets to Macedonia demand much higher standards (as increasingly does the domestic market).

Golem Grad island is also an important asset recommended by guide books, but it is difficult to access at present. The island is in the care of Galičica National Park.

*Clambering around on Golem Grad ... is definitely one of the coolest experiences you can have in Macedonia. There is nothing to worry about from the skittish snakes, but wear hiking boots and bring water and snacks. Among the ruins there's one reconstructed church and numerous views through the demented trees hanging over the lake. In Yugoslavia's glory days of the 1960s hoards of day trippers braved the snakes to venture onto Golem Grad's rocky forested shores (McAdam et al, 2009:310).*

### Rural tourism

An exception to the overall decline in tourism to Macro Prespa is the rural, community-based tourism which has been developed (following the example of Micro Prespa and elsewhere) at Brajčino village. This has involved long term support from the Swiss Agency for Development and others. The EU Prespa Quality Tourism project has attempted to strengthen and expand this CBT product to other villages, including training and the production of a brochure (Prespa: enjoy the heart-warm welcome) and useful map. However no organization seems to have taken this project forward following the end of programme support and there appears to be limited tour operator linkage. The quality of accommodation is presently acceptable but basic. The traditional hospitality experience appears excellent and cultural and other activities can be organised on request. The village is developing a good tourism reputation thanks to strong community leadership.

### Hiking and mountain tourism

The land-based national park product is mostly orientated towards domestic tourism from Ohrid to the west and Bitola to the east: There is relatively little developed product on the Prespa-facing slopes at present. The National Park of Galičica has developed an information centre at Stenje which could become an important facility in the future, Both Galičica and its sister national park of Pelister on the opposite shore have much to offer including hiking trails, activity tourism, very important

church frescoes and magnificent views.

### **Touring**

There is a small but important privately-owned costume museum in the village of Podmočani. This offers an interesting experience with a very personal touch and is beginning to be included in tour operator programmes. The Modern Ceramic Museum in Resen has an excellent collection. St George's Church in Kurbinovo (1191), the 15th century Church of St Petka, Parasakevy, and the Monastery of Slivinica (1607) all contain very important frescoes and are visited by occasional tours. The Fishing Village tourist attraction on the west shore has closed: This remains the 'pictures postcard' view of Prespa on sale in tourist shops in Ohrid and Skopje, but it is now completely derelict following the closure of the nearby resort hotels.

Bird-watching, botanical tours and caving are also 'products' which Skopje or Ohrid tour operators will organise on request, but the numbers attracted at present would seem to be very small. Heritage tourism (visiting ecclesiastical treasures) is also an important special interest area.

## **2.6.3 Present tourism product in Greek Prespa**

### **Village tourism**

The fishing village of Psarades offers a range of accommodation, taverns and boating trips including on Macro Prespa to caves and hermitages (Metamorfofosis Soitiros, Mikri Analipsi, Panayia Eleoussa). Agios Germanos is an attractively restored traditional village with nearby Lemos offer a good range of services. There is one seasonal and one all year tavern and a café in Mikrolimni. Other villages also offer accommodation with superb views and interesting churches and other attractions. There are beaches at various locations around Micro Prespa and at the Prodhena shores of Macro Prespa at Pdodena. Swimming is only allowed in Macro Prespa, based on the Ministerial Decision for the designation of Prespa National Park.

Europeaid programmes targeting Western Macedonia (such as LEADER) have encouraged the expansion of room supply, product diversification and product upgrades.

### **Touring**

The island of Agios Achilleios is a popular attraction accessed by a long floating walkway. The island has church ruins, interesting walks, taverns and accommodation. Retail stalls sell souvenirs and local produce. Other places to visit include the Biological Station at Latsista, and the Thematic Centre in Pyli describing fish, lakes, aquatic birds, the Information Centre in Agios Germanos describing cultural and



environmental values and the Information Centre concerning SPP in Agios Germanos. There is also a Byzantine Interpretative Centre in a restored Ottoman building near Agios Germanos.

### **Hiking and mountain tourism**

Hiking trails have been devised in the National Park and surrounding lands. Some are way-marked and leaflets explaining the trails are available. These offer superb views and an excellent visitor experience.

### **Bird-watching**

Bird-watching is of course an important tourism activity, particularly when the pelicans are resident (May to September). A number of bird hides have been developed and SPP can supply knowledgeable guides.

### **Spa and wellness**

One property in Greek Prespa is offering spa facilities.

### **Other special interest tourism**

Groups and individuals come to this area also to study botany, dendrology, architecture and other aspects of the ecology of the area.

### **Volunteerism**

NGOs are offering opportunities for volunteers to spend time in the area on scientific, architectural, educational and social projects.

### **Events tourism**

Special events such as mountain bike races are organised occasionally. Local festivals take place during the summer. Traditional local panagjur in each village are important, as is the annual 'Prespeia Festival', the annual international youth meeting.

### **Skiing**

In winter accommodation in Greek Prespa villages is sometimes used by skiers from the nearby Vigla Mountain Resort. Winter tourism is a development priority in the Western Macedonia Region.

## **2.7 Conclusions and key issues arising**

The current tourism product in the Prespa Lakes basin is largely dependent on domestic tourism with standards for domestic tourists: each country mostly serves its own domestic market and there is very little trans-boundary tourism, other than some transit traffic.

## 2 Assessment and evaluation of the current status of the tourism sector

Water-based tourism is very limited and 'Round the lakes' car touring is not possible due to the closed border at Dolno Dupeni. Tourism in all three countries is highly seasonal. Municipal basics such as solid waste collection and water and sewage systems need to be put in place before tourism can develop further in Albanian Prespa.

The tourism product in Greek Prespa is more developed than in the other two jurisdictions around the lakes. It is a model of responsible tourism development with high respect for ecological values, although even here there are still some problems such as sewage disposal and visual pollution due to uncontrolled signage. Even here however there can be a shortage of things to do, causing a short length of stay in local accommodation.

## 3. Analysis of existing institutional structures and human resources

### 3.1 Institutions for trilateral cooperation in tourism

#### 3.1.1 Trans-boundary Prespa Park

Ms. Vivi Roumeliotou of SPP is quoted in The Bridge magazine as follows:

*The main practical achievements of the Prespa Park initiative so far are the adoption of a Strategic Action Plan for the Sustainable Development of the Prespa Park, laying down a common vision for the area across borders, and the ongoing implementation of an ambitious 5-year project on 'integrated ecosystem management' in the Prespa Park basin with substantial international and national co-funding.*

However with the interim Prespa Park Coordination Committee (PPCC) has not formally met for the past three years, it is clear that in terms of creating an institution for trilateral cooperation, there is a long way to go. The PPCC did have Secretariat. The secretariat consisted of NGOs (one from each country) but because NGOs were not funded in Albania and the former Yugoslav Republic of Macedonia, only SPP with its own funds supported the work of the PPMC and played the active role of a secretariat. Since the signing of the Prespa Agreement, the PPCC has not met and is not longer functioning as a body. The new body which is stipulated in the Agreement (Prespa Park Management Committee, PPMC) will have its secretariat which will be funded by the Governments once the body is established. A tentative PPMC was appointed in early 2010, however, elections took place in all three countries, which led to changes in all the three ministries, and since then there has been little progress with the establishment of the cross-border body.

Once members are appointed it is envisaged that the PPMC will meet twice a year. It will be made up of representatives from the following organisations:

- One member of each Ministry of Environment of each state party and one representative of the EU;
- One representative of the local communities in Prespa from each state party;

- Representative of environmental NGOs from each state which have significant local activities in Prespa region;
- Representative of the local protected area management authorities from each state;
- One permanent observer from MedWet<sup>34</sup>; and
- One permanent observer from the secretariat of the Ohrid Lake Management Committee.

### 3.1.2 Other international institutions for cooperation

SNV Netherlands Development Organisation has proposed a heritage tourism route based on the historical Via Egnatia (which ran North of Macro Prespa connecting Ohrid and Heraclea Lyncestis near Bitola<sup>35</sup>), however following the global withdrawal of this NGO from tourism projects it is not clear what the status of this proposal is. The Via Egnatia Foundation<sup>36</sup> works to stimulate awareness and validation of the cultural unity as well as the ethno-cultural variety in the region, but is not a tourism development initiative.

Many other international participants including the GEF, EC, UNESCO and UNDP as well as the Ramsar Convention on Wetlands have worked with the various states in the past ten years to create a common culture of collaboration in Prespa and have provided support, guidance and funds. Focus has been on strengthening the capacity of nature conservation, strategic planning towards conservation and sustainable development. Tourism strengthening has also been initiated but sustainability and institutional embedding are concerns UNWTO also provides a forum for the three governments to share data and possible projects.

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<sup>34</sup> MedWet is a long term collaborative initiative that supports the conservation and wise use of Mediterranean wetlands within the framework of the Ramsar Convention on Wetlands. In 1999 MedWet was officially recognized as a Ramsar Regional Initiative, actively promoting the implementation of the Convention in the Mediterranean.

<sup>35</sup> Consultation with curator, Heraclea Lyncestis

<sup>36</sup> <[www.viaegnatiafoundation.eu](http://www.viaegnatiafoundation.eu)>

## 3.2 Public sector institutions at regional level in the tourism sector

### 3.2.1 Albania

Korçë region does not have a tourism department or a tourism officer, so there is very little institutional capacity for tourism development. Recognising this, SNV Netherlands Development Organisation has initiated a Korçë DMO which includes regional government representatives. The DMO which is private sector-led, appears to be successful to date.

### 3.2.2 The former Yugoslav Republic of Macedonia

CRPPR is the regional investment agency, established by the units of local government of the Pelagonija planning region (Bitola, Prilep, Kruševo, Resen, Demir Hisar, Mogila, Novaci, Dolneni and Krivogaštani) under the Law on Balanced Regional Development. CRPPR prepares project proposals for development of the planning region and for the areas with specific developmental needs. It also promotes the developmental opportunities of the planning region. CRPPR has capacity in development planning and its staff includes a tourism graduate who has responsibility for tourism promotion and other issues.

### 3.2.3 Greece

The Western Macedonia Tourism Directorate is located in Kozani and is part of the state tourism structure (Hellenic Regional Tourism Directorates). It has a Chief Officer and two division directors covering classification and advisory services. It markets through the Greek National Tourism Organisation and assists in the organization of press visits which sometimes take in the Greek Prespa region. The Tourism Company of the Region of Western Macedonia is being reactivated at present.

The Prefecture of Florina was active in tourism marketing and its successor operates an information centre in Thessaloniki as well as providing tourist information within its jurisdiction.

With the opening of the Via Egnatia Odos motorway however the Municipality of Kastoria is becoming the main Southern gateway to the Prespa region and is currently actively engaged in tourism promotion. The City of Kastoria is itself of considerable tourism interest with rich history and interesting architecture, and a beautiful lakeside setting.



## 3.3 Public sector institutions at local level in the tourism sector

### 3.3.1 Albania

The local communes around Prespa Lake are the effective custodians of its tourism product, including important heritage sites such as Mali Grad island and cliff-side hermitages. Their members have received some training in hospitality skills and some young people are attending tourism courses in Tirana, Korçë and Ohrid. Otherwise however local capacities for tourism are very weak. The Woman Society is active in servicing visitor needs with support from SPP.

There is no municipal tourism officer or tourism department and there are significant weaknesses in effectiveness when it comes to solid waste disposal, which is a key issue if tourism is to develop. The municipality has applied jointly with Greece for European cross-border funding to put a trip boat on Macro Prespa.

### 3.3.2 The former Yugoslav Republic of Macedonia

Resen Municipality also does not have a tourism department or a tourist officer: This is a key institutional weakness for future tourism development. The Economic Development Department handles tourism and UNDP has established a Human Capital Resource Centre which includes some tourism data.

Local communities are the custodians of important heritage sites including rural churches with important frescoes and architectural features dating from the eleventh century onwards.

### 3.3.3 Greece

The Municipality of Prespa is also not very active in tourism at present as it also has severe resource constraints with only 13 staff and no tourism department. It does not have a tourism development strategy. It has organised occasional press visits to the area and has applied for European funding for putting two trip boats on Macro Prespa. The reopening of the border crossing at Dolno Dupeni is seen as important for realising the tourism potential of the area, and to facilitate local people.

The mayors of all three municipalities are anxious to move the trans-boundary tourism agenda forward, which is an opportunity.

## 3.4 National Parks

### 3.4.1 Albania

#### National Park of Prespa

The National Park of Prespa is working to restore the forested landscapes around the Prespa Lakes in Albania. Most emphasis is on community liaison and awareness-building. The Park is constructing an information centre on the main access road northwards to the former Yugoslav Republic of Macedonia and plans to open one also on the Southern approaches from Korçë. The park contains important hermitages and other heritage sites and trails will be available. KfW is helping Prespa National Park to develop a management plan at present.

### 3.4.2 The former Yugoslav Republic of Macedonia

#### Pelister National Park

Pelister National Park has a management plan (2006) recognises amongst the park's socio-economic values that

*due to its diversity geological features and aesthetic appeal, the park may be promoted as a destination for geotourism<sup>37</sup> and for educational purpose (2006: annex, p66).*

An area of 4,800 hectares is included in the 'tourism-recreation zone' but this is outside the Prespa watershed (there were 711 beds available within the park in 2006 with the largest facility being the children's hostel). The numerous picnic areas (more than 50) in the park and hiking can be arranged with the Park Administration: Trails extend towards Prespa Lake. The commercial tourist facilities in the Park are outside the watershed area but attract thousands of visitors each year. The most numerous are citizens from Bitola who consider the Park an important part of their identity. Their number is significantly higher during the spring and summer seasons, especially at weekends and national holidays and during the different periods for collection of forest products (wild fruits and mushrooms). There is also a large number of visitors during the winter season, mostly concentrated around the skiing areas at Begova Cheshma. The zoning of the park allows for horse riding, cycling, walking, rock-climbing and skiing in designated areas. (Pelister National Park, 2006).

<sup>37</sup> Geotourism is an American term referring to "tourism that sustains or enhances the geographical character of a place - its environment, culture, aesthetics, heritage and the well-being of its residents."

The national park plans to

*mark new trails that connect the villages in the immediate vicinity of the Park, on both the Prespa and Pelagonija side, with attractive destinations within the Park (2006: 42).*

Emphasis is given in the management plan to enhancing capacities of park staff regarding tourism and conservation, and to improving partnerships and cooperation with tour operators and others.

### **Galičica National Park**

Galičica straddles the watershed between Ohrid and Prespa and has a detailed management plan in place, and a designated tourism department. It has a range of tourism leaflets available covering different aspects, including landscapes, plant species, forests, geomorphology and Golem Grad island. In addition to the island, the National Park includes the Western shores of Macro Prespa lake. There is a new national park centre at Stenje. The park is involved in various NGO initiatives including the development of a cross-border designated Biosphere<sup>38</sup>.

The Park's tourism development policy is based around the ten principles of the European Charter for Sustainable Tourism in Protected Areas. These are as follows (Häusler, 2009):

- To involve all those implicated by tourism in and around the protected area in its development and management.
- To prepare and implement a sustainable tourism strategy and action plan for the protected area.
- To protect and enhance the area's natural and cultural heritage, for and through tourism, and to protect it from excessive tourism development.
- To provide visitors with a high quality experience in all aspects of their visit.
- To communicate effectively to visitors, tourism businesses and residents about the special qualities of the area.
- To encourage specific tourism products which enable discovery and understanding of the area.
- To increase knowledge of the protected area and sustainability issues amongst all those involved in tourism.
- To ensure that tourism supports and does not reduce the quality of life of local residents.

<sup>38</sup> Biosphere reserves are areas that have been protected under UNESCO's Man and the Biosphere (MAB) programme in order to conserve and support biological diversity. The goal in creating a biosphere reserve is to manage the land and its water to meet human needs and conserve natural processes. Biospheres often contain national parks within them, but also include human settlements and human activity.

- To increase benefits from tourism to the local economy.
- To monitor and influence visitor flows to reduce negative impacts.

A wide and impressive range of tourism development projects for the Park are outlined in its Tourism Action Plan. These are mostly small scale but will substantially improve the tourism product of the Park and upgrade its quality as a tourism destination. Many are already underway although further funding is needed. The largest project, apart from National Park Centre construction in Ohrid and Stenje, is developing walking, cycle trails and general direction signs through the National Park. A new bird-watching tower is also proposed for the Prespa side of the National Park.

This organisation probably has the highest capacities in terms of ecotourism in the region and should be closely involved in future responsible tourism planning, development and marketing.

### 3.4.3 Greece

#### **Prespa National Park**

Prespa National Park is the largest National Park in Greece with a core area of 4,900 hectares and a surrounding zone of 14,750 hectares. It was formerly a Forest Park and is adapting to a more conservation-orientated role. In 1974 the area was declared as a National Forest with a total range of 290.7 km<sup>2</sup> and was the biggest National Forest in Greece. In 2009 it was declared as a National Park, with total range of 327 km<sup>2</sup> (Mount Varnous was included in the National Park). The park has a management plan, currently under revision in order to include new legislation on environment. The management plan includes among other attractions, measures for tourism management, promotion and awareness-raising activities. It doesn't have a tourism department, but it has a Department of Information, Publicity and Education and the person in charge of that department has a degree in Tourism Enterprise. The Thematic Centre at Pyli is used by the Management Body not only as an information centre, but also for meetings and conferences. The Management Body doesn't have any independent income and selected activities will be funded the Greek Ministry of Environment until 2015.

## 3.5 Local non-governmental organisations engaged in tourism

### 3.5.1 Society for the Protection of Prespa

SPP is one of the main driving forces in the environmental preservation of Prespa Lakes basin and was founded twenty years ago in 1991. It has initiated and successfully implemented many initiatives in the areas of environmental protection and architectural restoration, which are essential assets for sustainable and responsible tourism development. These include assignments with the WWF; Royal Society for the Protection of Birds (RSPB), EuroNatur and the European Commission (EC) including INTERREG and LIFE projects, and the MAVA Foundation. Many projects have tourism-related aspects, coming under SPP's activity area of 'sustainable development': SPP's primary ethos is however environmental.

Tourism-related studies have included the "Plan for Open City Land Use and Town Planning" project in the Municipality of Prespa and an eco-label assessment for locally made food (the "One Europe, More Nature" (OEMN) programme). SPP works closely with local private and public stakeholders. SPP publishes arrange of useful tourism-related publications (often with the Prespa National Park) and is an initiator and champion of the trans-boundary Prespa Park concept and of trans-boundary environmental education. The society is currently assisting the development of TICs in Zogradec (Albania) on Micro Prespa and in Stenje (former Yugoslav Republic of Macedonia) with the Galičica National Park. The Zogradec Information Center has been SPP's initiative and is one of the relatively few trans-boundary tourism initiatives at present. The building belongs to SPP but it is run with the Women's Association of Micro Prespa. Four women from the association have been trained as eco-guides. The project is funded by the MAVA Foundation<sup>39</sup>. The objectives of the programme are:

- Promotion of a forgotten area of Micro Prespa to local, regional, national and international stakeholders, through the implementation of small scale activities;
- Implementation of capacity building activities for the local population, in order to support them developing projects for the area;
- Development of small scale nature conservation activities in the area of Micro Prespa, Albania.

<sup>39</sup> <[www.mava-foundation.org](http://www.mava-foundation.org)>. The name is drawn from the initials of founder Luc Hoffmann's four children – Maja, André, Vera, and Daria.



As an NGO SPP cannot trade or be licensed as a tour operator and the shortage of licensed tour operators (and local guides) is seen as a constraint on tourism development potential by the society.

SPP has a lot of expertise in environmental and vernacular architecture issues and should be closely involved in future responsible tourism planning.

### 3.5.2 Cultural Triangle of Prespa

CTP is an independent, non-profit local NGO situated in Greek Prespa but working in all three countries. CTP seeks to working towards an equal quality of development on each side of the border based on the protection of the common environmental and cultural wealth. CTP's aims are as follows:

- To reduce the effects of rural isolation on the local communities at a cultural, economical and educational level
- To bring together civil society activists and local stakeholders and to support them in strengthening their capacity and networking
- To offer opportunities to children and young people from all over Europe to meet and to realise their possibilities, to develop skills in the fields of arts and new technologies and in taking initiatives.

CTP currently works on networking; children and youth; and the development of tourism (including working on the 2010 TSAP).

CTP is also pioneering 'voluntourism' in the area and a volunteer is presently assessing the potential of backpacker tourism for the region. CTP has also developed mountain biking stage races in the region and works with a wide range of NGOs and funding agencies. CTP also has a lot of tourism planning expertise.

### 3.5.3 Other local NGOs

A Prespa Ecotourism Association was established in 2009 in Greek Prespa. It does not appear to be currently active.

Other local NGOs also have tourism interests, such as the Artists' Faculty for Tourism and Organisational Sciences which has a residential school near Stenje in the former Yugoslav Republic of Macedonia; and the Fishermans' Village project also on Marco Prespa, which has ceased trading. SNV Netherlands Development Organisation was formerly advising tourism development in Albanian Prespa and there are a number of other NGOs active in the country.

## 3.6 Private sector

The private sector is of course the engine of tourism: Without it tourism would not exist. Virtually all Prespa tourism enterprises in the private sector are family-owned SMEs and many are micro-enterprises. In Greek Prespa tourism has been the subject of rural diversification initiatives, increasing the supply of businesses but probably with insufficient back-up training in SME marketing techniques and (possibly) international tourism standards. Although a number of training initiatives have been undertaken under various grant programmes in all three countries (notably the EU-funded Prespa Quality Tourism initiative), there is no long term institutional commitment to training which will be essential if a quality, competitive tourism destination is to emerge. More SME-focussed training is needed covering a wide range of vocational, management and marketing areas. Given the very small size of the industry in Albania and the former Yugoslav Republic of Macedonia, 'start your own business' courses will be necessary once market conditions improve. The lesson of past programmes seems to be that all tourism training needs to long term and embedded in local training institutions, and not run on a 'one off' basis.

As in many countries a lack of coordination and an unwillingness to jointly fund marketing initiatives bedevils the private sector, particularly at a parochial level. Strong leaders have not emerged to unite the industry and drive it forward with a clear and responsible tourism vision: Addressing and facilitating this process will be very important, but there is no 'quick fix'.

## 3.7 Educational institutions

### 3.7.1 Tourism education institutions in the Prespa area

There is a private college offering tourism courses in Resen.

### 3.7.2 Tourism education institutions in the wider region

#### St. Kliment University, Ohrid

The Faculty for Tourism and Organisational Sciences has a long tradition in preparing personnel for the tourism industry, it has almost 30 years of tradition and experience in education. The faculty offers undergraduate and postgraduate programmes and distance learning programmes

with international universities. It offers undergraduate programmes in Tourism, Gastronomy and Hotel Management. For graduate students, the faculty offers two types of postgraduate programmes: one organised solely by the Faculty for Tourism and Organisational Sciences in Ohrid; the second one is a distance learning option, organised in cooperation with foreign universities. Postgraduate studies are offered in Tourism Management; Management in Catering Industry and International Tourism. The faculty has many achievements and is highly regarded and should be capitalised upon.

#### **Fan Noli University, Korçë**

The University was created in 1994 from the Higher Institute of Agriculture of Korçë which had operated since 1971. In 2009 the School of Tourism was opened in Pogradec.

## 3.8 Conclusions and key issues arising

The current TSAP (LaPaz, 2010) does not contain a detailed institutional and human resource analysis and, due to time restraints in-country, the current assignment process did not allow for detailed review of institutional and human resource capacities with managers and staff. Comments noted are therefore not based on thorough institutional assessments and should be treated with caution.

It is clear however that there are very significant weaknesses in human resource capacities for tourism planning, particularly at municipal level. National Parks have been the subject of development support and tourism-related capacities in all three countries, and capacities for managing tourism are probably higher than in other government institutions, and still improving. Tourism capacities overall are higher in Greece than in the other two countries and much more can be gained from exchange (if there is the political will to cooperate). Greek NGOs also have much to offer in terms of capacity development, however given limited results from tourism initiatives to date, it will be important to ensure that NGO-led tourism programmes remain focussed on external beneficiaries and do not become an end in themselves. Tourism marketing appears to be a significant weakness for all players in all three countries, with Albania's DMO making some progress, building on capacity development support from SNV.

Key areas where capacity development support will be needed thus include responsible tourism development planning for municipalities; and tourism marketing and tourism training for the private sector and other players, including IT skills.

## 4. Inventory of current product

### 4.1 Introduction

This inventory summarises tourism product on offer in the Prespa Lakes basin. It indicates the facility, the main markets that it currently serves, and notes any issues arising. The inventory is not separated by country to enable evaluation of overall product strengths and weaknesses. Only facilities which are generally accessible to tourists are included. It should be noted that this inventory is based on a very brief appraisal and not all sites could be visited in the six day mission. For almost all sites detailed market research regarding visitor profiles is not available, so assumptions have been made and should be treated with caution.

### 4.2 Visitor attractions – nature

**Table 12.** Nature attractions

*Notes: A = Albania; M= The former Yugoslav Republic of Macedonia; G= Greece*

Facility	Main markets served	Other comments
National Park of Prespa including information centre (A)	Local market, domestic tourists and some international	The Park is attempting to restore a landscape which has been degraded due to logging in the 1990s and local subsistence needs. A park centre with an information office is under construction near the Northern boundary. A second information point on the Southern (Korcë) boundary is also planned. Management plan in preparation.
National Park of Galičica (M) – visitor centre in Stenje	Domestic market and tourists visiting Ohrid	Most facilities on the Western side (outside watershed). Offers hiking and biking trails, trails, motor access, fine limestone biodiversity and superb views. Management plan in place. Includes Golem Grad island.
Pelister National Park (M)	Domestic market and tourists visiting Bitola	Most facilities on the Eastern side (outside watershed). Offers ski centre, hiking, biking, off-road trails, park centre, granite-based biodiversity including rare pine. Management plan in place. Hopes to open visitor centre on Western (Prespa) slopes.
Thematic Center of Pyli (G) – visitor centre with bird hides, viewing points, way-marked trails	Domestic market plus international visitors. Special interest groups. Hiking clubs. School groups	Covers important headwaters of the Prespa Lakes. The Park is in the process of transition from forestry to ecological management. Fairly extensive tourist facilities have been developed including trails, information points and the Park Centre.
Ezerani Reserve (M), two elevated ‘hides’.	Occasional bird-watching groups.	Management currently under review. Needs specialist input.
National Park Info Center of Vrondero		Currently closed due to lack of staff
National Park Info Center in Agios Germanos for the cultural and environmental values	Passing tourists interested in nature	
Biological Station (G) Mikrolimni.	Academic researchers	Hostel accommodation

Bird-watching is a very important tourism product and facilities and information is most developed around Micro Prespa, led by the expertise of SPP. In the former Yugoslav Republic of Macedonia, Ezerani Reserve is less developed for tourism.

## 4.3 Visitor attractions – culture

Facility	Markets served	Other comments
Mali Grad island (A) with Shen Maria Cave Church, (14th century)	Domestic and international tourists; bird-watchers.	Accessible by boat from Liqenas. Requires permission from Ministry of Culture in Korcë and key (also available from National Park) for church to be opened to see important internal frescoes.
Shen Maria Globoko Cave Church and monastic cells (A)	Special interest	Accessible by boat from Gorica e Madhe , requires permission from Ministry of Culture and key (also available from National Park)
Rock of Spille, prehistoric cave art (A)	Special interest	Other prehistoric sites nearby (Walls at Stuec; Treni Cave)
Golem Grad island (M)	Domestic and international tourists	20 hectare island of immense archaeological importance (Grozdanova, 2008). Continuously inhabited from the 4th century BC and including church ruins and the Church of St Peter (14th century) with fresco of the Persian siege of Constantinople in 626 AD. Island is part of National Park of Galičica
Church of St George, Kurbinovo (M)	Special interest and general cultural tourists.	The interior of this small rural church (1191 AD) contains some of the most important murals of early Christian art (Serafimova, 2008). An on-site curator and conservation/visitor management strategy is urgently needed to protect this very important heritage site.
Church of St Elias, Grnčari (M)	Special interest and general cultural tourists.	Frescoes from the 13th century. Conservation/visitor management strategy needed.
Monastery of Slivnica (M)	Special interest and general cultural tourists.	This substantial site dates from 1607 and thrived until the late 19th century. It is no longer an active monastery and parts have been rebuilt in recent times. Its artistic and historical importance relates to donor inscriptions and stylistic imagery relating to the Ohrid archbishopric, Mount Athos and Western Art (Popavska-Koroba, 2008). Conservation/visitor management strategy will be needed to protect this heritage site when tourism increases.
Church of St Petka, Brajčino (M)	Special interest and general cultural tourists.	Important frescoes and icon from the 16th, 17th and 19th centuries. Conservation/visitor management strategy needed.
Modern Ceramic Museum, Resen (M)	Special interest and general cultural tourists.	Rich collection housed in Resen's historic Saray Building. Also art gallery in the Saray building including paintings of Keraca Visulčeva.
Haji Ramadan Mosque (M)	Special interest	Resen's 'Friday Mosque' with its elegant Ottoman minaret was built in the 17th century and can be visited on request.
Ethnological Museum, Podmočani (M)	Coach tours, special interest and general cultural tourists.	Very important private collection of over 2,000 Macedonian costumes and ethnic jewelry, lovingly displayed. Requires long term conservation strategy and funding for re-housing/better museum-standard display and multi-lingual interpretation.



Facility	Markets served	Other comments
Agios Achilios (G),	This heritage site attracts all types of tourist visiting Greek Prespa	Important and attractive monastic island now connected to the mainland by a floating causeway. Churches and frescoes and important ruins of basilica built by Tzar Samuel. Ecclesiastical ruins date from the 11th century onwards.
Agios Nikolaos, nr. Lemos (G)	Special interest and general cultural tourists	18th and 19th century icons. 15th century church of Ipapandi nearby.
Agios Germanos (G)	Coach tours, special interest and general cultural tourists	Superb domed Byzantine church dating from the 11th century. Important frescoes.
Agios Athanasios (G)	Coach tours, special interest and general cultural tourists	Important mid-Byzantine architecture.
St German Byzantine Centre (G)	Coach tours, special interest and general cultural tourists	Interpretative centre in restored Ottoman building.
Agios Nikolaos, Pyli (G)	Special interest and general cultural tourists	Many interesting architectural features. May date from 12th century.
Hermitage of Metamorphosis (G)	Special and general interest tourists	Accessible from footpath. Dates from 13th century.
Hermitages of Panayia Eleoussa and Agios Petros	Special interest and general cultural tourists	Accessible by boat from Psarades

**Table 13.** Culture attractions

Notes: (1) A = Albania; M = The former Yugoslav Republic of Macedonia; G = Greece

(2) The area has a great number of ecclesiastical sites: Only main sites of particular interest to tourists are listed above.

## 4.4 Water-based tourism

In Yugoslav times there was a trip boat on Macro Prespa. Today however, apart from swimming (which guide books do not recommend, e.g. Miller et al [2009] on Greece) and boat hire to visit islands and heritages, there is relatively little water-based tourism on the Prespa Lakes. Facilities are most developed on Micro Prespa, where floating pontoons and other access points have been put in place for both tourist and local boats. These facilities are lacking on Macro Prespa and its islands. There are very few full time specialist adventure operators based in the area specializing in water-based tourism (canoeing, sailing, windsurfing, etc.). Regulations restrict some water-based tourism opportunities (such as game angling), but there are undoubtedly opportunities which are not being exploited.

## 4.5 Adventure and sports tourism centres

The main facilities for adventure and sports tourism are generally through the national parks. One operator, Spirit of Discovery in Greece, is pioneering this important future area for tourism. CTP also organizes events, but NGOs are restricted from mainstream tourism activity in Greece at least. Overall there are surprisingly few full time specialist adventure tour operators based in the area: These are critical businesses to develop for tourism growth. Skiing is important as a winter product.

**Table 14.** Adventure tourism

Notes: A = Albania; M= The former Yugoslav Republic of Macedonia; G= Greece

Facility	Markets served	Other comments
Spirit of Discovery (G)	Domestic and international	Good programme offering hiking, biking, orienteering, etc. < <a href="http://www.spiritofdiscovery.gr/">http://www.spiritofdiscovery.gr/</a> >
Prespanana Travel and Tours (G)	Hoping to serve inbound markets	Newly established licensed tour operator in Agios Yermanos < <a href="http://prespana.gr/">http://prespana.gr/</a> >
Travel Agency Pelikan (M)	Mostly outbound	Has been involved in assisting inbound tourism under the PARTNERS II project.
Vigla Mountain Hut & Ski Resort (G)	Greece & Western Europe	Skiing here does not have a high online profile

## 4.6 Accommodation in the Prespa watershed

**Table 15.** Accommodation

Notes: \* In Albania there are about 20 more double rooms in Gorica area and at least 15 in Liqenas and Zaroshka area, which correspond to hotels or guesthouses that are not currently operational but are under construction or have remained unfinished due to the lack tourism at present..

^ There are two large hotels currently closed and in need of substantial refurbishment on the Western side of Lake Prespa. There are also closed hotels in Resen and on the eastern shore. More guesthouses have been 'trained' for tourism purposes than currently operate. Only operating premises within the watershed are shown in the table above.

Country	Category	Number of establishments operating 2011	Number of rooms (2011)	Comments
Albania*	Hotels	3	35	Properties generally one star standard and seasonal
	Guesthouses	5	30	Basic homestay accommodation standards
The former Yugoslav Republic of Macedonia^	Hotels - lakeside	1	14	Two star standard
	Other accommodation		168	Calculated based on Municipality of Resen revenues from lodgings <sup>40</sup>
Greece	Hotels	6	156	
	Guesthouses	11	168	

<sup>40</sup> Using the base figure of 12,227 rooms sold in 2010 and assuming 20% occupancy this would imply there are 168 rooms in the municipality (hotels and guesthouses)

## 4.7 Tourist information centres

Information centre	Other comments
Zagradec Information Centre (A)	On the edge of Micro Prespa Lake. Established by SPP and the Woman Society Micro Prespa. Includes a coffee shop.
Prespa National Park (A)	Recently refurbished, to open soon
National Park of Galičica visitor centre in Stenje (M)	Not operational yet
Brajčino village (M)	CBT information service
Proposed Pelister National Park centre, Ljubojno (M)	Building identified but not acquired yet
Prespa Park Visitor Centre (G)	Fully operational tourist information centre of a good standard. Between Lemos and Agios Germanos
Info Center of Vrondero (G)	Currently not open due to lack of staff ( jurisdiction of the National Park)
Thematic Center of Pyli	Near Pyli , under the jurisdiction of the National Park
Agios Yermanos (G)	In SPP premises
Lemos library (G)	TIC operated by CTP
Info Center in Agios Germanos of the National Park	

Table 16. Tourist information centres

This is an emerging area of strength, however there is also a danger of over-supply.

## 4.8 Festivals and events

Table 17. Festivals and events

Festivals in recent years have included the following:

Notes: A = Albania; M= The former Yugoslav Republic of Macedonia; G= Greece

Events	Markets served	Other comments
Lake Day (A & M)	Local	21 June
Wine festival (A&M)	Local	
Prespa Apple Harvest Festival (M)	Local	One day festival in Resen (September)
Petka Feast Day, Monastery of Sveta Petka (M)	Local	Religious festival (August)
Mountain Bike Races (G)	Greece & international	Organised by CTP
Prespia Summer Festival, –annual festival which takes place in Agios Achillios and other parts of Western Macedonia (G)	Greece and some international;	Up to 5,000 people can be accommodated on the hillside to watch concerts on the ‘stage’ (the Basilica ruins)
Paniyiria (festivals in honor of local saints) May to August (G)	Prespa region and some international	Important local festivals with music, dance and local food

## 4.9 Conclusions, product gaps and key issues arising

The Prespa lakes basin's greatest product strengths lie in its nature and heritage. Facilities to foster nature-based and heritage-based tourism are considerably better in Greece, which also has a much stronger accommodation base per head of population, and higher standards. A network of TICs has been developed in Greek Prespa and is developing in the two countries at present.

There is no real trans-boundary tourism on offer and there are very few private sector tourism operators, although some small activity tour operators are developing in Greek Prespa: These are vital for tourism development and need support. The accommodation base in Albania and the former Yugoslav Republic of Macedonia is weak, with some developments in CBT but little else. Seasonality is a major challenge in all three countries and, apart from the ski centre, products and events have not been not developed to attempt to address this. There is an expanding TIC network that could be built upon.

There are no real flagship tourism products to put Prespa 'on the map' at present. Visitor numbers are small, except for during holidays (national, Christmas and New Year, Easter, and 15th of August on the Greek side).

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*Cover photo: Daniel Bartsch  
Back cover photo: Lj. Stefanov*

*Design: APOLOIMAGES*





*This publication was produced with technical support from the United Nations Development Programme (UNDP). It is intended to be a forward-looking visioning document which will help promote responsible tourism initiatives in the Prespa Lakes basin.*

July 2012