



INSTITUTI I KËRKIMIT DHE ZHVILLIMIT BARLETI



Adventure Tourism in Albania, Bosnia and Herzegovina and Serbia: Opportunities and impediments



Regional Cooperation Council
Provided by the RCC Tourism
Development and Promotion
Project's Grant Programme



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I. RECENT DEVELOPMENT ON TOURISM INDUSTRY

1.1. Albania

Albania is distinguished for its diverse and magnificent nature. A great part of the territory (almost 2/3) consists of mountains and hills. The impressive relief, with many fractures and microforms, is rich in hydric resources, forests and flora and fauna. Albanian nature offers many opportunities for various outdoor tourist activities. A visitor can experience the freshness of the mountain climate and the Mediterranean warmth of the coast all within a short time frame.

Tourism in Albania has been a key element to the country's economic activity and is constantly developing. It is characterized by its rich archaeological and cultural heritage dating back to the classical period when Illyrians and Ancient Greeks inhabited the region.

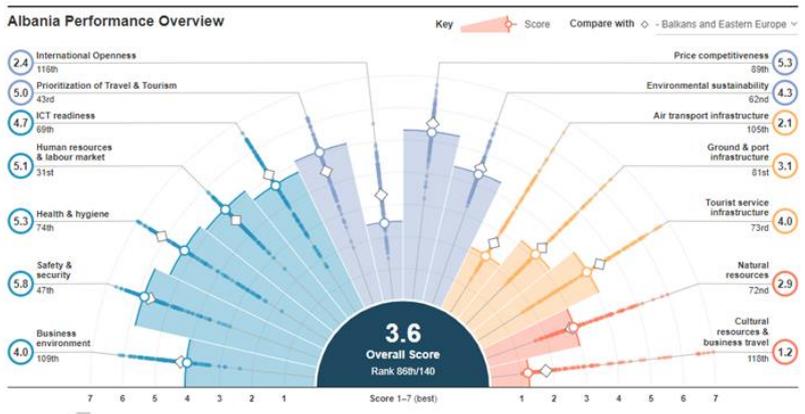
Across the country's territory there is a wide range of microclimates due to differing soil types and topography. The warmest areas of the country are found at the coasts where the climate is profoundly impacted by the sea, while the coldest parts are at the northern and eastern hinterlands, where snowy

forested climate is prevalent. Notably the country features unspoiled beaches, mountainous landscapes, traditional cuisine, archaeological artifacts, unique traditions, low prices and the wild atmosphere of the countryside.

Albania is on the list of countries with great touristic potential such as historical and cultural heritage. Albania has many natural attractions, from the Adriatic and Ionian coasts to national and wildlife reserves, protected areas, wetlands etc.

The number of tourists in Albania has increased in recent years, turning Albania into an important tourist destination in the region. In the period 2014-2018, the arrivals of foreign citizens coming in Albania were approximately 23.6 million persons. Only during 2018, the arrival of foreign citizens is 15.8% more than 2017. Today Albania marks the fastest growth in the tourism sector among SEE countries, with over 5.3 million reported international tourist arrivals for 2018 and 2.193 million USD in international tourism receipts (UNWTO, 2019). More specifically, the sector has reportedly contributed an average of 2.8% to the GDP, amounting to a total of 45 billion ALL generated through tourism related activities including: accommodation, food and drink services, travel and tour operators, car rentals, and other leisure

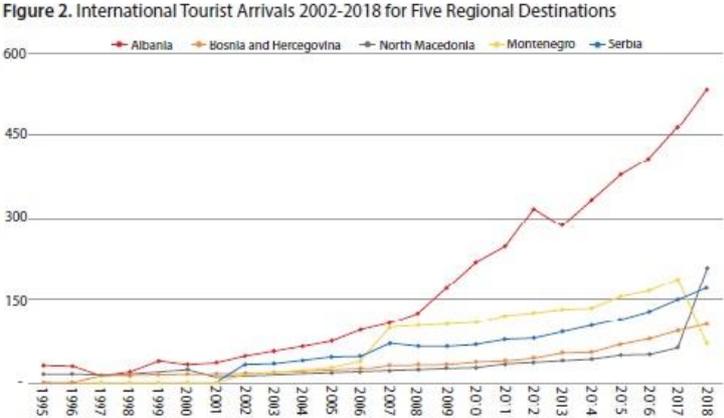
activities (INSTAT, 2019). The sector’s contribution to employment in 2017 was also seen as positive, with 93,000 direct jobs and 291,000 indirect jobs attributed to the tourism development value chain, and over 22,785 enterprises operating in the tourism sector (Ministry of Tourism and Environment, 2019).



In 2019, Albania advanced twelve places on the scale of tourism concreteness, compiled by the World Economic Forum (WEF), compared to the 2017 measurement and twenty places compared to 2015 measurement. Among 140 countries, it ranked 86th. Her score of 3.6 is 5.5 percent better than the 2017 survey.

The Travel & Tourism Competitiveness Report 2019 is based on an assessment of 14 factors in the competitiveness of the tourism sector within four key categories. They relate to environmental sustainability, tourism policy, and the state of development conditions, infrastructure, and natural and cultural resources.

Albania has made progress in several fields specially at Tourism & Travel policy and enabling conditions subindex ranking 43rd in Prioritization of Travel & Tourism, the 89th in price competitiveness and 62nd in environmental sustainability. However, Albania has made regress in business environment ranking 109/140.



Source: World Bank data, based on WTO Yearbook of Tourism Statistics, 2019

Albania has about 2000 cultural monuments, making it the second largest in the Mediterranean basin in terms of the density of cultural monuments. Meanwhile the historic centers of cities of Berat and Gjirokastra and the archaeological site of Butrint are part of the world heritage and are protected by UNESCO. The archaeological parks of Apollonia, Shkodra, Bylisi, Amantia and national museums in Tirana, Kruja (Museum "Gjergj Kastrioti Skanderbeg" and the Ethnographic Museum), Berat (the Iconographic Museum "Onufri" and the Ethnographic Museum), Shkodra (Marubi Museum), Korça (Museum of Medieval Art), etc. represent an important potential of the tourism offer. Notably the country features unspoilt beaches, mountainous landscapes, a traditional cuisine, archaeological artefacts, unique traditions and the wild ambience of the countryside.

The broad palette of Albania's tourism offering is the foundation of the Government's National Strategy for Sustainable Development of Tourism 2018-2022. While 'sun and sand' tourism continues to be the dominant drawcard for international and domestic tourists, its market share is giving way to increasingly popular participative and experiential activities. Albania is well placed to cater for this

evolving market with its own brand of cultural, adventure and ecotourism.

The interest in discovering Albania's tourism attractions drew almost 6 million international tourists to the country in 2018 representing a year on year increase of 16 per cent and contributing 3.83 billion Euros to the economy.

The most prominent feature of Albania's topography is possibly its numerous successive mountain ranges with an average altitude of more than 700 metres. Much of the mountains including the Albanian Alps lie to the north, east and south of the western lowlands. The Korab Mountains dominate the east of the country and expand 40 kilometres along the eastern border of the country, where peaks can reach 2,500 metres. The mountainous landscapes with glacial lakes and caves are traversed by river valleys with crystal waters, gorges and mountain saddles and have a rich biodiversity attracting both domestic and foreign tourists to enjoy ecotourism pursuits including trekking, mountaineering, biking, snow skiing and snowshoeing, kayaking and fishing. There's also hydrospeed experience in the wilderness of the River Vjosa.

Albania has a Marine Park and 14 National Parks covering around 6.7 per cent of the country. Butrint is both a National Park and the site of one of Albania's

three UNESCO World Heritage Sites with the well-preserved ancient city walls, a baptistery, a great basilica, theatre and castles. Albania's southern coastline, with its lovely traditional hamlets, cobblestoned streets and small Orthodox churches, has plenty of beautiful beaches lapped by pristine waters.

Table 1. Arrivals of foreign citizens according to regions 2016-2019

Description	2016	2017	2018	2019
Total	4,735,511	5,117,700	5,926,803	6,406,038
I Africa	1,077	2,080	3,457	21,645
II America	103,839	123,729	148,845	153,579
III. East Asia and Pacific	35,894	53,533	68,121	66,757
IV. Middle East	4,324	4,722	7,174	11,005
V. South Asia	1,699	2,216	3,115	3,167
VI. Europe	4,485,405	4,686,695	5,331,614	5,774,226
Central /Eastern Europe	182,581	269,261	362,083	371,988
Northern Europe	149,965	204,099	212,246	234,902
Southern Europe	3,855,617	3,810,337	4,301,996	4,635,974
Western Europe	221,492	316,120	357,411	416,983
East/ Mediterranean Europe	75,750	86,878	97,878	114,379
VII Other countries not Specified	103,273	244,725	364,477	375,659

(Source: INSTAT, 2020)

Business tourism is evolving with convention centres and expo facilities as stand alone complexes and also integrated with major hotels. MICE delegates can also join up with the growing number of gastronomy tourists on guided tours that explore the Albanian countryside seeking out authentic regional cuisine and wines.

1.2. Bosnia & Herzegovina

Bosnia and Herzegovina has enormous tourist potential, which is unfortunately underused. It abounds in exceptional natural beauty, cultural and historical values, and favorable climatic conditions. Thanks to its natural wealth, mountains, canyons and rivers, Bosnia and Herzegovina has ideal conditions for the development of adventure tourism, which is a combination of adventure, recreation, relaxation, and fun. There are few countries in the world where tourists can ski on the same day in the top ski resorts of the Olympic Mountains and walk or ride a bike along the sea.

Various cultures, religions, and traditions have intersected on the territory of Bosnia and Herzegovina for centuries, leaving their mark, which gives additional value for the creation of a specific

tourist product. Bosnia and Herzegovina has excellent tourist potential due to its geographical position. As a country located in the center of Europe, it can attract a large number of tourists within a 3-hour flight.

Bosnia and Herzegovina's advantages in the development of tourism are primarily untouched nature, richness of rivers and thermal waters, rich cultural and historical heritage, and numerous shrines, which represent the potential for the development of various forms of tourism in our country. Internationally recognized and important events also attract a significant number of tourists.

In this sense, the tourism sector in Bosnia and Herzegovina has a high potential that needs to be further exploited.

In recent years, Bosnia and Herzegovina has become increasingly recognized as an excellent destination due to the relatively low cost of services and good but not expensive food and beverage offerings. Hospitality is a significant factor for creating a good general impression and re-visits to B&H. In that sense, exit polls show that tourists are delighted with this aspect of tourist service in B&H. The dominant types of tourism in B&H are winter tourism; cultural tourism; eco, ethno-tourism; adventure tourism, religious tourism, spa tourism, and coastal tourism.

B&H's tourism sector has recorded positive trends for all major growth indicators in the last five years, but there is still significant room for further use of its core potential. Of course, the COVID 19 pandemic has taken its toll when it comes to tourism in Bosnia and Herzegovina, but it has also brought the leading tourist countries to their knees. According to the UNWTO, B&H is defined as one of the three tourist destinations in the world, with a total growth potential of the tourist market of 10.5% (for the period until 2020).

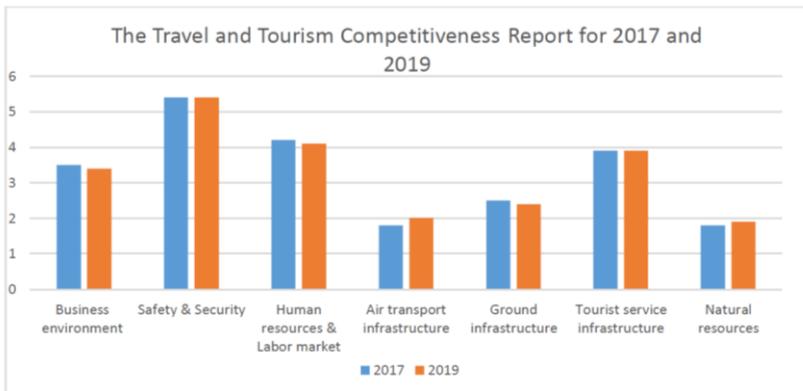
The tourism sector in B&H has a high potential that has not been used at an approximately optimal level. Currently, B&H, in terms of the degree of its tourist potential, in which it abounds, can be considered a "rough diamond."

Tourism requires and enables the development of the necessary infrastructure that is the foundation of any other economic progress. The construction of tourist infrastructure also serves other sectors, whether industrial or agricultural, and then it is not a competitor but has a complementary feature.

Regardless of its tourist potential, Bosnia and Herzegovina, in recent years has been a transit area that served tourists as the shortest route to the destination of their choice. The solution to this problem could be that only through joint activities of

established tourist boards, tourism associations, quality offers of travel agencies, and of course with the support of relevant government institutions, tourism in Bosnia and Herzegovina can be brought to the stage where it could become one of the leading economic activities, which would promote the state itself in a whole new light.

In 2019, Bosnia and Herzegovina advanced eight places on the scale of tourism concreteness, compiled by the World Economic Forum (WEF), compared to the 2017 measurement. Among 140 countries, it ranked 105th. Her score of 3.3 is 5.2 percent better than the 2017 survey.



The Travel & Tourism Competitiveness Report 2019 is based on an assessment of 14 factors in the

competitiveness of the tourism sector within four key categories. They relate to environmental sustainability, tourism policy, and the state of development conditions, infrastructure, and natural and cultural resources.

Nevertheless, the report states that Bosnia and Herzegovina is the least competitive economy in the region in the field of tourism and travel, despite an increase in its overall result. Bosnia & Herzegovina has the worst business in the environment category (134th place) and overall infrastructure (97th place), the report said.

The research showed that the Balkans and Eastern Europe had one of the fastest improvements in research on the development of competitiveness of all sub-regions. Countries have reduced the gap behind other sub-regions in areas related to nature and cultural tourism, building themselves as tourist destinations.

The best in the region in terms of competitiveness in the development of tourism and travel is Slovenia in 36th place, Montenegro in 67th, Serbia in 83rd, and ahead of Bosnia and Herzegovina in the ranking are Albania in 86th and Northern Macedonia in 101st place. (Indikator.ba)

Tourism can contribute to improving employment growth, as services are the fastest growing sector in most WB6 countries (6 IPA II beneficiaries in the Western Balkans), and tourism can create jobs directly and indirectly. For example, 11% of all new jobs created in Bosnia and Herzegovina in 2018 were related to tourism. Tourism contributes significantly to the labor market in all economies of the WB6 countries.

1.3. Serbia

Tourism in Serbia is officially recognized as a primary area for economic and social growth. Rich culture and history, unique natural beauties, numerous monasteries from the period of establishment of Serbia, archeological spots, remains of Roman empire, castles, SPA, ethno and old Serbian villages, night life, festivals, gastronomy and unexplored nature are the main reasons for development of different types of tourism.

Tourist arrivals – In 2019, the total number of tourist arrivals in Serbia was: 3,689.983 (growth of 7,6% compared with the same time of the year in 2018.), of which 1.843.432 was domestic tourists (growth of 7,2%), which means that they participated with 49,9% in total arrivals. The number of foreign tourist

arrivals was 1,846.551 (growth of 8,0% compared with 2018.), that represents participation of 50,1% in total tourist arrivals.

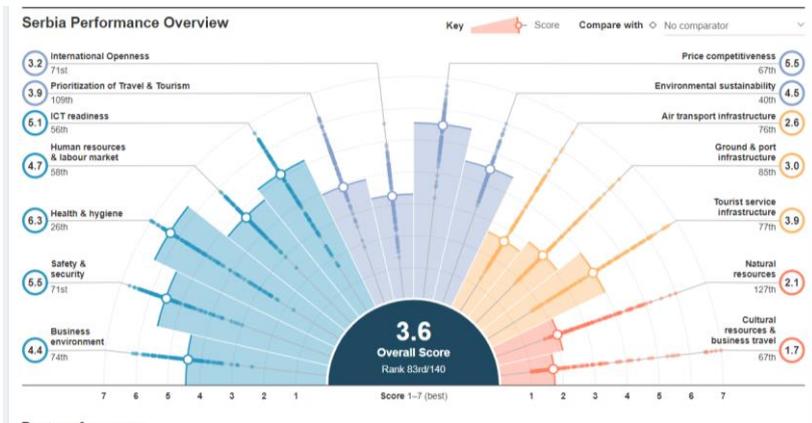
Tourist overnight stays - In 2019 was realized 10,073.299 overnight stays of tourists(growth of 7,9% compared with the same period in 2018) of which domestic tourists realized 6.062.921 overnight stays (growth of 6,8% compared with the same period in 2018), that means they are participated with 60,2 % in total number of overnight stays, while foreign tourists reached 9,6% more overnight stays(4,010.378) compared with the same period in 2018. They participated with 39,8% in total number of overnight stays.

In the area of tourism in recent years, there has been a significant Government commitment to remedy the sub-sector deficiencies with support of EU and bilateral donors. Tourism is a complex subsector requiring many players to be involved in delivering the wide range of facilities and services combined to provide the overall visitor experience. Majority of actions were directed towards realisation of the Danube Serbia tourism potential through investments in infrastructure, cultural assets restoration and strengthening of the tourist offer provided by SMEs. However, the implementation of the previous Tourism Development Strategy 2006-

2015 was fragmented, with lack of systematic coordination and cooperation of relevant stakeholders at national, regional and local level. Furthermore, the efforts didn't result in attracting desired level of investment in tourism (part from Belgrade), either from private sector or IFIs. Therefore, Serbia needs a new approach in the form of comprehensive interventions in pilot areas aiming at implementation of the Tourism Development Strategy of the Republic of Serbia (2016-2025) through a capacity building for institutions, investment in touristic and cultural assets and incentives for service providers.

Serbia's position in the Travel and Tourism Competitiveness Report for 2019 is modest, standing at 83rd position out of 140 destinations. It scores relatively well on Health and Hygiene (26th) and ICT readiness (56th) but is placed low on issues such as "Prioritisation of Travel and Tourism" (109th) that is measuring the extent to which the government actively promotes and orchestrates the development of the tourism sector or "Cultural resources and business travel" (67th) measuring the tourist valorisation of cultural resources. There is a fundamental need for leadership in tourism but also for collaboration and partnership in the way it is developed and delivered. To be able to address the

weaknesses identified in the Travel and Tourism Competitiveness Report and to implement the actions envisaged in the Strategy, the Government needs to have strong capacity within its institution responsible for tourism issues able to drive the planned actions towards strategic objectives, attract private investment in tourism, measure its impact on economic development, as well as coordinate and steer the stakeholders' participation.



Equally, Serbia's tourism industry is relatively small by international standards, with direct contribution to Serbian economy amounting to 2.3% of total GDP in 2016 and generating 38,000 jobs (1.9% of total employment). The total contribution to GDP

(including wider effects from investment, the supply chain and induced income impacts) was amounted to 6.7% of GDP and supported 99,500 jobs, nearly three times greater than its direct contribution showing the wide potential of tourism impact on the economy. The foreign currency revenue amounted to US \$1,345 billion, placing tourism on the second place in the Serbia's service sector. The total number of tourists in in Serbia in 2017 was 3.08 million (12.1% increase comparing to 2016), showing a steady, but modest increase throughout years. The tourist visits are mainly concentrated in the Danube wider area (or Danube Serbia as identified by the European Union Strategy for the Danube Region - EUSDR). Out of the total number, over 1.15 million visited the two major cities of Belgrade and Novi Sad with average stay of 3.3 days by domestic and only 2.1 days by foreign tourists. During that time, 74.4% of tourists have visited Belgrade's cultural and historical heritage and 30.1% engaged in cultural or entertainment event, proving Belgrade's appealing offer for tourists of all backgrounds. The tourists have been showing a significant interest in one of the most recognisable buildings in Belgrade and one of the top 10 tourist and cultural attractions of Serbia.

Eastern Serbia is part of the Danube that over centuries represented a natural border of the Roman Empire with archaeological remains developed in

tourist products such as “Roman Emperors Route” and “The Fortresses on the Danube”, with UNESCO World Heritage site and heritage of great significance³⁴ as the highlight. The area offers visits to the National Park Djerdap and the Stara Planina Mountain, as well as tourist products such as wine and monastery routes, unique Rajacke pivnice and various geothermal spas. In recent years, the public investments in tourism in the area have increased significantly, with EUR 2.5 million invested in port infrastructure for cruise ships admission, ongoing road investments and approximately EUR 1 million in preservation of different cultural heritage sites. However, the area needs further incentives to be able to provide comprehensive tourist products and experiences, enticing to a modern tourist. On average, tourists stayed in Eastern Serbia for only 1.8 days, showing the area is not providing sufficient accommodation or enough experience for a longer stay. This is significantly confining the possibility for greater revenue generation in the service sector and the development of SMEs.

According to the World Tourism Organisation (UNWTO) research, 37% of all travel has a cultural component proving significant economic potential of cultural heritage assets. However, cultural heritage locations/destinations need to be efficiently preserved, presented, marketed and able to offer complementary products and services to provide a complete hospitality experience for a modern tourist

in a form of comprehensive tourist products. Eastern Serbia has been lagging behind in that respect and the tourist valorisation of its rich cultural (especially Roman) heritage remains limited due to poor tourist infrastructure and low quality of tourist offers. As part of the “Roman Emperors Route” tourist product, the area of Felix Romuliana has seen an increase of 11% in the number of visitors in 2016⁴⁰, but the total number of 30,800 visitors that focus on a half-day trip to the location is still insufficient to have a significant impact on tourism development. The same applies to Smederevo and Fetislam fortress (Kladovo) that are part of the “Fortresses on the Danube” tourist product, with 28,647 and 22,350 tourists respectively, in 2016. Smederevo Fortress (on the tentative UNESCO list) is the last great creation of the Serbian military construction, while Fetislam is a medieval fortress dating from the Ottoman period built on the ruins of the fortress from the Roman period.

II. RECENT DEVELOPMENT ON ADVENTURE TOURISM

Adventure travel may include any of the following 34 activities: joining an archeological expedition; attending local festival/fairs; backpacking; bird watching; camping, caving; climbing; taking a cruise; participating in cultural, educational or environmentally sustainable activities; fishing/fly-fishing; getting to know the locals; hiking; horseback riding; hunting, kayaking; whitewater rafting; learning a new language; orienteering; joining a research expedition or safari; sailing, scuba diving; snorkeling; skiing and snowboarding; surfing; trekking; walking; visiting friends and family; visiting a historical site; and participating in a volunteer tourism program (ADTI, 2020)

2.1. Albania

The adventure tourism is fastest growing segments of tourism industry worldwide. The small businesses have dominated this sector, but these businesses are mostly unprofessional; while, as bigger businesses are lesser in this field with proper professional management systems ensuring the safety and curbing the increasing demand. The lifestyle entrepreneurs have established adventure tourism

businesses, or rather by the adventure tourism lovers. The adventure tourism is one of the best ways to earn from tourism industry not only for the business owners, but the locals can take the benefits from it as well.

According to the adventure tourism development index for 2020 (ATDI) Albania ranks 27th between the developing countries. This report has been published by Adventure Travel Trade Association (ATTA) and International Institute of Tourism Studies at the George Washington University, during a very tough period of COVID-19 pandemic. Research includes the analysis of adventure tourism competitiveness for 191 countries, of what 28 are in the category of developed and 163 in the category of developing countries

Hiking and mountain climbing. There are many sites in Albania that offer opportunities for mountain climbing. The most important areas for climbing are: Jezerca, Mountain of Hekuri, Razma and many others in the Alps, Munella in Puka, Korab, Radomir and Lura in Dibra Region, Biza in Tirana, Cika mountain in the district of Vlora, Tomori mountain in Berat, Gjinari in Elbasan, Rungaja mountain in Vithkuq, Qafë Shtama park in Krujë, etc.

Mountainous regions are also attractive for outdoor camping. The territory of Albania offers great

opportunities to exercise the activities of trekking and mountain climbing. An interesting trekking program is the one called “Trekking of Cika”, which goes through the valley of Dukat, Cika mountain range, Kurveleshi zone and ends at the Ionian coast. The trekking route is Dukat-Tërbaç-Vranisht-Kuç-Kudhës- Qeparo.

Other areas suitable for trekking and mountain climbing are the Albanian Alps in points such as: Vermosh, Theth, Razëm, Bog, Valbona, etc. Tomori mountain, extending to the districts of Berat and Skrapar. Other spots are Vithkuqi, Voskopoja, Drenova in Korça District, Guri i Kamjes in Pogradec, Drino valley in the area of Dropulli, Gjirokaster District, Borsh -Zhulat route that goes through Kurvelesh.

Walking is another way to enjoy nature and at the same time, exercise. In Albania, walking is also a very popular activity. The nature and the areas with narrow trails and paths, can make this activity a very pleasant one.

Winter Sports. Due to the elevated and mountainous terrain, Albania offers suitable natural conditions for organizing winter sports. These sports are expected to grow, thanks to many investments projected in this area. In some areas of Albania, the snow cover is above 100 days, creating natural conditions for ski

lovers. In Albania there are not yet developed authentic skiing centers, but there are a number of suitable natural platforms for ski lovers. An example is Bigelli Ski Resort near Dardhë, where there is also a portable elevator. The national ski championship races are held here. Other natural platforms are those of Peltecu in Voskopjë (Korçë) which go to 1.160m above sea level and those near mountainous town of Puka, Shistaveci in Kukës, Grabovë in Gramsh, Razma in Western Alps, etc.

Mountain Biking & Exploration of Caves. Mountain biking & exploration of caves. A special activity in mountain areas are also mountain biking tours. The equipment for these sports should be taken with you, as they cannot be rented. Some of the tours are organized in the Albanian Alps, such as Theth, Bogë, Vermosh etc. Another bicycle tour is one which crosses the shores of Lake Shkodër. You can also find maps of the tours, developed through joint projects of professors and students of the universities of Shkodra and Podgorica.

As a result of the widespread limestone formations in the territory of Albania, there is a development of various forms of karst, which has helped in creation of many carstic caves which have attracted many visitors. In Shkodra alone there are 35 of these caves such as: the cave of Zhylë, Juban, Muriq, Pusi, beer

circles, etc. A cave of special tourist interest is the cave of Pëllumbasi, which is also called the “Black Cave”, it is located southeast of Tirana. Another cave of interest for tourists is Pirrogoshi cave. It is the largest in Albania, located in Skrapar. Other caves are: Cave Neziri (Mat), cave of Lek Pete in Kurvelesh, the cave of Treni in Devoll, etc.

Underwater Diving. Professional diving opportunities have been developed only during the last decade. The rich underwater discoveries in Albanian seas provide a unique opportunity for divers to explore sea life and sunken ships. Underwater sports centers are located in North of Vlora (Adriatic Sea). Towards the south, from Vlora to Saranda, there are numerous sports centers, where you can practice this growing sport.

During the last years, joint Albanian-American expeditions have discovered old drowned ships in the area. The most suitable places to practice this sport are Karaburun Peninsula, Sazan Island, the area north of Saranda, Vlora

In particular, it is Vlora Bay that ‘hides’ many sunken ships of considerable antiquity. However, the most famous and popular is the Italian hospital ship “PO”, which sank in March 1941 and was shot by a British airplane “Swordfish”. Sunken objects reach a depth of 33 m and a length of 150 m. Another important discovery is in the north of Saranda bay, where a

sunken ship was discovered dating back to century III or IV B.C. Large amphoras are also found there. It is thought that this relic discovered is among the best preserved of the Mediterranean. Besides sunken objects, it is also interesting to observe green and black algae, corals, etc.

Sazan Island is rich in sea life, with various underwater rocks. This serve as a habitat for a wide variety of fish and living fauna. The eastern part of the island is a popular area for diving and offers the most interesting sceneries. Diving guides are also offered by different companies in this area. Karaburun Peninsula is a large and intact area, perfect for diving and underwater exploration. A southern stream keeps the water clean and offers excellent visibility. This area is completely intact and has been turned into a diving destination. It has a magnificent beauty and offers great potentials.

In the last few years, there are more and more paragliding fans in Albania, as well as adventure-seeking tourists who decide to fly under the skies of southern Albania. Every year, paragliding meetings and competitions in overflight and precision landing are organized

Rafting: Osumi Canyons: Two to three million years ago, water erosion created one of the most recognized natural wonders of Albania: the Osumi Canyons in

Skrapar. At a length of about 14 km, they can easily be traversed today by rafting, offering explorers the possibility of paddling the rubber boats under the shadows of imposingly high rocks. The experience of rafting and the majesty of this place has earned it the status of the Albanian Colorado. At a width ranging from 4 to 35 meters, and slopes above 100 meters, rafting through the canyons may last 2 to 4 hours, depending on the river flow. The greenery on the slopes and the eight wonderful waterfalls cascading down from them make the journey truly spellbinding.

The itinerary that begins in Hambull and continues up to Çorovodë, is filled with stops, necessary not only for relaxation but also for enjoying the extraordinary nature. The best-known waterfall which represents an obligatory stop for all those who come here is the Waterfall of the Lovers, which has long since become one of the area's most popular postcards. Many legends enrich the reality of the area and it is thought that there are plenty of still-unexplored caves and nooks in the rocks. This wonderful and once-in-a-lifetime adventure is best experienced in groups of family and friends.

Rafting in Vjosa: As a result of its bountiful water and the extraordinary landscapes surrounding it, the crystal-clear Vjosa River offers the perfect conditions for an unforgettable rafting experience. The tours

begin in Përmet and, following a training session for those lacking experience, the sailing which lasts 2 to 4 hours, commences. Along the course, the visitor will encounter canyons, small islands and various twists and turns, all of which create a truly authentic rafting experience. Usually, the packages for those who choose to practice water sports are supplemented with visits to other important destinations near Vjosa, as well as tastes of the area's culinary traditions.

Kayaking. Kayaking shares similar features with rafting, but it requires specific skills and a slightly different physical preparation. Some of the most well-known kayaking places are: Canyons of Osum or Vjosa, Komani Lake, Albanian Riviera, etc. In most of the Albanian beaches, you'll find some kayak boats which you can hire and enjoy the crystalline waters. If you want to be part of a more professional tour experience, Albania Adventure offers an 8 day Kayaking Tour, where you'll have the chance to discover some of the most unique and virgin beaches and bays of Albania.

It is further necessary to recognize that adventure tourism typically takes two forms, which are independent (recreational) or organized (guided or facilitated). Guided or facilitated adventure tourism

experiences are typically provided by three types of organizations:

- Adventure Travel Tour Operators – these are fully-fledged tour operators that provide consumers with a package of services including accommodation, transport, guides and equipment as required. Such operators may work on a fixed departure group basis i.e. where dates are available for individuals or small groups to book and/or on a tailor made basis. They typically operate throughout Albania though some specialise in particular regions. They may be limited to a single activity e.g. walking holidays or provide a wide range of experiences across a range of activities.

Some of the key players in this sector are: Active Albania (<https://www.activealbania.com/>), Albania Adventure (<https://albania-adventure.com/>), outdoor Albania (<https://www.outdooralbania.com>), Albanian Adventure Resort (<http://www.aar.al/>), Adventure and fun Albania (<https://adventure-fun.al/>), Albania Rafting Group (<https://www.alrafting.org/>), etc.

- Activity & Experience Providers - this category probably represents the largest number of businesses and may include, i.e, mountain guides and river rafting operators. These businesses are typically based in one location but may work on a regional and/or national basis. Activities and

experiences offered may last from a couple of hours from single person operations to larger businesses, which will have a dedicated administration function, and team of instructors/guides. They also include landowners who have developed activity provision either in-house or in partnership. They may work exclusively in the leisure tourism market or in business tourism as well e.g. providing day activities for a corporate client. For example, in the village of Radomire, on the foot of Korabi mountain, the hotel owners offer hiking guides.

2.2. Bosnia & Herzegovina

Thanks to its natural wealth, mountains, canyons and rivers, Bosnia and Herzegovina has ideal conditions for the development of adventure tourism. Adventure tourism offers a combination of mountain biking, river rafting, paragliding, parachuting, and horseback riding, with rest, relaxation and sightseeing. Adventure tourism is a combination of adventure, recreation, leisure, and fun to keep tourists from everyday problems and stressful situations.

With its lush forest, endemic tree species, many crystal clear mountain rivers and springs, lakes, exciting landscapes, and above all, a healthy

environment make the area of Bosnia and Herzegovina very promising and attractive for the development of adventure tourism.

Adventure excursions and arrangements contain various forms of active recreation of tourists offered through:

- launching by rubber boats and kayaking on the crystal clear rivers Tara, Una, Neretva, Trebizat, Vrbas, and Tara.
- rock climbing, hiking, cycling, mountain biking, skydiving, ski touring, are organized in the beautiful and magical surroundings of the Olympic Mountains, and the mountains Treskavica, Romania, Prenj, Čvrsnica, Zelengora, Velež, Vranica, Ozren and form a small a niche with a tendency to grow.
- Bjelasnica, Igman, Jahorina, as well as Treskavica, Romania, Prenj, Cvrsnica, Zelengora, Velez, Vranica and Ozren offer the possibility of camping, hiking, rock climbing, mountain biking, paragliding, and parachuting.
- Mountain biking enthusiasts can enjoy riding through beautiful landscapes on Trebević, Ozren, Igman, Bjelašnica, Visočica, Velež, Vranica, Vlašić, Zvijezda, Jahorina, Romania, Treskavica, Bitovnja, Zelengora, and Majevisa.

- The rivers Tara, Una, Neretva, and Vrbas provide conditions for rafting, rafting, and kayaking. The Vrbas River hosted the World Rafting Championships in 2009 and the European Kayak and Canoe Championships in 2011, and National Geographic Traveler recommended rafting on the Tara, Neretva, and Vrbas as the best tourist tour in 2012.

Staying in beautiful and untouched nature, somewhere near a lake, river, or mountain, is offered by many camps in Bosnia and Herzegovina.

In the last few years, there are more and more paragliding fans in Bosnia and Herzegovina, as well as adventure-seeking tourists who decide to fly under the skies of Bosnia and Herzegovina. Every year, paragliding meetings and competitions in overflight and precision landing are organized.

Tourism is considered one of the main drivers of socio-economic development and progress. In the past few decades, tourism has experienced strong diversification and has become one of the fastest-growing economic branches globally.

The leading cause of tourism is man's motive. The motives created in a person can be different, such as going out of the city on a multi-day trip for a vacation, a one-day trip to attend various events, or natural

phenomena. We also closely link the tourist experience to the motives, which is often a factor in choosing a destination or activity. Primarily, a reason is created, while the experience is a factor that is created during the journey by visiting or doing a specific activity.

The above problems and obstacles for the development of tourism in general in B&H and the creation of a tourist offer that would attract tourists as a place of final destination, and not just transit space that tourists visit on the way to their final destination in another country, can be applied to adventure tourism.

All the natural potentials of Bosnia and Herzegovina for the development of adventure tourism will remain an unused "uncut diamond" unless we create specific content with a skilled workforce and a combination of two or more forms of tourism.

2.3. Serbia

According to the adventure tourism development index for 2020 (ATDI) Serbia ranks 26th between the countries in development. This report has been published by Adventure Travel Trade Association (ATTA) and International Institute of Tourism Studies

at the George Washington University, during a very tough period of COVID-19 pandemic. Research includes the analysis of adventure tourism competitiveness for 191 countries, of what 28 are in the category of developed and 163 in the category of developing countries. The data was collected and analyzed in 10 categories: politics of sustainable tourism, protection and security, health, natural resources, cultural resources, resources for adventure activities, entrepreneurship, humanity, tourist infrastructure and image. According to the ATDI index for 2015, Serbia advanced from 65th place in 2011 to 34th place.

For this and similar types of tourism, the most important part has the new trends, just like the fast pace of living. People look for something where they can spend their energy, but at the same time to feel the rush of adrenaline so they can completely satisfy their needs and “restart” themselves from everyday life. The basis for development of adventure tourism in Serbia are exactly the wealth of natural resources and favorable geographical position of the country, so Serbia is excellent for this type of tourism.

According to a survey conducted by NTOS (National Tourism Organization of Serbia) during 2015 and 2016, 52% of respondents among domestic tourists cited natural attractions as a motive for traveling,

while for 8% the motive was sports activities. There is a slight difference in the opinion of foreign tourists - 42.8% emphasized natural attractions as a motive, while 11.9% sports activities.

The mountains of Serbia are natural tourist resources with distinct recreational, aesthetic and exceptional features. In the conditions of urbanisation and globalisation, the importance and attractiveness of mountains, as oases of preserved nature, is growing. The types of adventure tourism that can be first developed in the mountains of Serbia are hiking, mountaineering and cycling. *Hiking and trekking* are very popular activities in the world. They involve hiking in the countryside, along the already established paths and carrying appropriate equipment. Although hiking tourism is one of the most widespread types of tourism in the world, it is not the case in Serbia. On almost all the bigger mountains in Serbia (Kopaonik, Stara, Golija, the Valjevo mountains, Rudnik, Homoljske, Tara), there are walking paths appropriate for hiking, and their difficulty is determined by their length (approximately 20–30 km) and altitude. Participants are accommodated in mountain homes, used by mountaineering societies.

Cycle tourism is developing slowly, although numerous European cycling tour operators include

Serbia within their routes. There are eight cycle routes in Serbia. The international cycling race 'Through Serbia' is of high importance, as it has taken place since 1939 and about 300 foreign contestants take part in it. Cyclists from Europe become acquainted with Serbia on the Danube Cycle Route, which is a part of the international route Euro Velo 6 (from the Atlantic Ocean to the Black Sea).

Mountain biking is important in adventure tourism and it starts where the asphalt ends. There are several mountain biking clubs in Serbia, and there are recreationists as well who travel on bikes

Rafting has been increasingly fashionable in Serbia in recent years. Climate conditions allow participants to stay on the rivers without special equipment between May and October. The rivers on which rafting is organised are the Lim, Ibar, Drina, Nišava, and Uvac. There are about a dozen rafting clubs within the Rafting Association of Serbia.

Free climbing appeared as an organised activity in the late 1980s, and the mountaineering society 'Avala' opened its first climbing section in 1990. There are several climbing clubs that are members of the Alpinist-Climbing Association of Serbia. The best known natural rocks for free climbing in Serbia are Borski Stol, Gornjak, Jelašnica, Ovčar and Kablar, and Sićevo.

Paragliding has been gaining importance since the 1990s as the youngest aeronautical sport, which does not require large financial resources. This type of adventure offers its participants experience and challenge, and several paragliding clubs organise training for interested participants. The best known take-off sites in Serbia are: Sićevo, Rajac, Golija, and Suva.

The mountainous area of Serbia is famous for its numerous caves and pits. The presence of karst terrain creates suitable conditions for the development of *speleotourism – caving*.

Adventure sports could be held nationwide, but the most adequate destination for adventure activities are in areas:

All this potential, could be used to launch Serbia to a very high rank in this part of Europe in years that come.

III. TOURISM LEGAL FRAMEWORK

3.1. Albania

The main law in the area of Tourism is the Law No.93/2015 “On Tourism” which substituted the Law No. 9734, date 14.05.2007. The law is intended to address several issues raised by the business

community and by the experts of tourism sector and can be considered as a big step forward in regulatory legislation in the area of tourism. The scope of the Law is the promotion of Albania as an attractive tourism destination, inter alia, by supporting the development of a sustainable tourism and ensuring that the service providers meet the needs of tourists. In addition, the Law sets out clear rules regarding the development of tourism, investor's financial support, criteria on operation of tourism related activities, etc. Insofar, the Law contains the following novelties:

- The determination of a (vertical) institutional tourism framework, which comprises, among the others, the ministry responsible for tourism (hereinafter, the "Ministry"), National Tourism Agency, National Coast Agency, the inspectorate covering the field of tourism, the Commission of Standardization of Tourism Activities, etc. Law 93/2015 creates a clear picture of the institutions dealing with the tourism sector both in national and local level by eliminating the overlap of competences among them and the uncertainty it cascaded to the users of the law, mainly to the foreign investors.
- The approval of the tourism development planning, which should be prepared in accordance with the national territory planning, the strategy on tourism and the legislation governing the territory planning

and development. Upon proposal of the minister responsible for tourism, the National Territory Council approves the priority areas of tourism development these considered as areas of national importance.

- The classification of tourism sources, which comprises the natural and human sources of tourism. Such sources shall be inventoried in the National Registry of Tourism Sources (“NRTS”), which shall be prepared by the Ministry and other national and local public bodies.
- The development and operation of a tourism project, in the priority areas of tourism development, based on the general public interest, might be carried out in state properties as well, in case the relevant structures, constructions and auxiliary services do not harm the natural and cultural parameters of such areas and comply with the national sectorial tourism plan.
- The Ministry can provide financial support to tourism related projects through funds deriving from the annual approved budget fund. The projects exceeding the value of 50% of the annual fund foreseen for tourism projects are subject to approval by the Council of Ministers. This support includes the financing of educational, promotion projects and studies or models of tourism products that help the

development of tourism. The supporting funds for these projects (i.e. submitted by, national or foreign, natural persons and legal entities) shall not be subject to the public procurement legislation.

- In the ambit of investments in tourism, the state might assume the role of the developer, enter into public-private partnerships, hold shares/stocks in tourism companies, make available immovable properties to private investors, provide supporting infrastructure, as well as combinations of the forgoing forms of investment participation.

- Any tourism enterprise operating as accommodation structure (i.e. whether “guesthouse”, “hostel”, “camping”, “hotel”, “motel”, “resort”, “curative center” or “bed and breakfast”) should apply with the Ministry for the issuance of the classification certificate, within 30 day following its registration with the National Registration Center. Accommodation structures, having commenced their activity prior to the date of entry into force of the Law (i.e. 15 days following the publication in the Official Gazette), must apply for the issuance of the classification certificate within 18 months from such date. The classification certificate, valid for a 4 years period, is automatically registrable upon completion of the classification process with the Central Registry

of Tourism, held by the relevant structure near the Ministry.

3.2. Bosnia & Herzegovina

Under the Dayton Peace Agreement, tourism is under the jurisdiction of the entities, and the entity laws governing this area are currently inconsistent. The consequence of this situation is that we do not have a Bosnian product with which we could jointly enter the world market, or even offer it to the citizens of Bosnia and Herzegovina.

Republika Srpska (RS), the B&H Federation, and the Brcko District have their own Law on Tourism.

In recent years, numerous activities have been carried out to harmonize the entity laws on tourism according to the recommendations of the European Union, the World Association of Travel Agencies, the World Association of Hoteliers and the Law on Consumer Protection. The adoption of the new harmonized entity laws on tourism is also envisaged in the 2016 Reform Agenda.

Republika Srpska. In 2017, the Republika Srpska passed the Law on Tourism which regulates the forms of planning and development of tourism in the

territory of the Republika Srpska, the rights and obligations of tourist entities, conditions for performing tourist activities, services in tourism, promotion and improvement of tourism, incentives in tourism, records in tourism, administrative supervision, as well as other issues of importance for the development and promotion of tourism.

Republika Srpska has a tourism register with licensed tourist agencies and tourist organizations in RS at the city level. Unfortunately, out of about 60 licensed travel agencies, only two or three have tours, activities within adventure tourism.

On the website of the Government of the Republika Srpska, in the section Ministry of Trade and Tourism, there are data for tourist traffic in the RS for each year by months. These documents are available for download and show the number of arrivals and overnight stays of foreign and domestic tourists compared to the number of tourist arrivals and overnight stays of the previous year for that same month and in relation to the month of January. What is especially crucial for adventure tourism is the data on the number of arrivals and overnight stays of tourists according to the type of tourist places and the classification of activities, i.e., in which kind of accommodation they stay. There are individual statistics for mountain locations, which are useful

data. The countries of origin of tourists coming to RS are listed.

Federation B&H. The Ministry of Environment and Tourism of the Federation of B&H drafted the Law on Tourism in FB&H harmonized with the Republika Srpska, which passed an extensive public debate during 2017. Based on the received remarks and proposals, the Draft Law was determined, which was adopted by the FB&H Government and submitted to the parliamentary procedure. However, in the FB&H Parliament, this law was not enacted but was returned to the proposer for revision. Unfortunately, to date, this law has not been finalized, and it has not been returned to the parliamentary procedure. In an interview with the representatives of the relevant ministry, they told us that they plan to submit the amended Federation B&H Tourism Law to the Federation B&H Parliament for consideration and adoption by the end of 2020.

The new law would enable the formation of tourist boards at all levels of government in FB&H.

A tourism register would also be introduced, as well as stronger inspections of entities registered as tourism service providers. In a word, the new Act should bring order to the tourism industry, which has been on the rise in B&H throughout recent years.

The new legal framework governing the planning and development of tourism in the Federation of B&H finally allows the formation of travel agencies at all levels of government. This means that travel agencies will finally be able to be formed at the level of the B&H Federation, cantons, but also cities and municipalities, as well as inter-municipal travel agencies. The law, in a new way, determines the forms and measures for financing and giving incentives to the development of tourism, performing tourist activities to tourist agencies, tourist guides, organizations.

The proposal of the Law on Tourism of Federation B&H with the proposed legal solutions aims to contribute to the suppression of the gray economy and ensure better protection of clients of travel agencies. Tourism is the driver of the economy in those places where it exists, but it also requires large initial investments in a situation where there is no long tourist tradition. In this regard, the proposed solutions seek to introduce more discipline in this area.

The tourist area is declared by the Government of the B&H Federation, with the previously obtained opinion of the cantons and local self-government units, and special protection is provided for the use

of the tourist area in a protected natural or immovable cultural property.

Travel guides, as well as agencies, will need to have professional training for the job they are doing. Tourist services in rural tourism, hunting, and fishing tourism, on the waters, in nautical tourism, services on the ski terrain, services with sports and recreational activities, tourist services in rafting, and rafting are regulated in more detail. This means that all providers of such services will need to be registered and professionally trained to receive certification for their work.

3.3. Serbia

The new Law on Tourism (“Official Gazette of the Republic of Serbia”, No. 17/2019) and the Law on Hospitality (“Official Gazette of the Republic of Serbia” No. 17/2019) entered into force on March 22nd, 2019.

The Law was adopted in other for regulations in this field to accompany the regulations of the European Union countries and other touristic developed countries in the region. The previous Law on Tourism which validity was abrogated by the Law regulated the field of tourism and catering. The new regulation in these fields are separated. The main objective of

the newly adopted law is to reduce the shadow economy in tourism. The Law is also harmonized with the Law on Inspection Supervision („Official Gazette RS “no 36/2015, 44/2018 – other law and 95/2018) and the Law on General Administrative Procedure („Official Gazette RS “No 18/2016) and the Law on Consumer Protection („Official Gazette RS “No. 62/2014, 6/2016 – other Law). The Law is also harmonized with the Tourism Development Strategy of the Republic of Serbia 2016-2025 („Official Gazette RS no. 98/2016). The newly adopted law follows the Directive (EU) No. 2015/2302 of December 25, 2015, which satisfied the need for harmonization of the regulations if the Republic of the Republic of Serbia with said directive.

In order to achieve the main goal which is the reduction of the shadow economy the provisions on the registration of the business activities of certain entities are more precisely regulated. The accuracy for the rights, obligations and responsibilities of tourist organizations has been accomplished at all levels. The local authorities have been given more powers in terms of submitting an imitative for the proclamation of a tourist area. According to the Law the tourist area is a space, which due to its characteristics, values and priority for touristic purposes, requires a special organizational, usage

and protection arrangement or the area envisaged for the construction of facilities of national interests.

The business activity by traveling agencies which is related to the organization of travel and related tourist arrangements is in line with the Directive (EU) No 2017/2302. The main postulate in this area is the protection of the rights of the consumer. Provisions about online sales of tourist arrangements and other services in tourism, as well as the provisions about the motor vehicle rental services are regulated in more detail in order to protect the consumers. The Law has the conditions that must be met in order to legally sell tourist arrangements. The Law also regulates the collection, storing, processing and using personal data. The Law entrusted new and broader authorization of tourist inspectors.

IV. TOURISM DEVELOPMENT STRATEGIES

4.1. Albania

In the area of tourism, from 1992 to date, a total of six sectorial strategies were prepared, including the current strategy. Two remained in a permanent draft form until they were replaced by subsequent strategies.

The timespan covered by each strategy (or draft strategy) has progressively decreased by over four-fold. Each new strategy has been introduced half-way through the mandate of the existing strategy, often coinciding with the arrival of a new government in office. This attests to the lack of a clear vision and model for economic development and the role that the tourism sector could play to this end.

The success rate of the implementation of the five sectorial strategies prepared between 1992 and 2019 remains a moot point, given that none of the strategies have been fully implemented. Each strategy refers to the preceding strategy, yet does not consider the reasons why the previous strategy was not successfully implemented.

The vision of current strategy approved in 2018 is: *“Albania, as a hospitable, attractive and authentic destination, for sustainable development of country’s economic, natural and social potentials”*.

The Aim of strategy is to promote Albania in the international community as a worthy destination to compete equally in the global tourism market. Consequently, Albania's positioning in this market will be based on two pillars of development:

- *Long-term sustainability of public interventions and investments*, to turn the country's tourism economy

into a tourist attraction, a better place to live and a more profitable potential for tourism ventures.

- *Regular protection and development* of geospaces in respect of nature, ecosystems, demographic and urban development in all areas with a potential in tourism development.

In terms of their contribution to tourism revenue, tourism products is classified into three main categories. These categories consist of those forms of tourism development, which occupy an important role in the sector's contribution to the overall economy. The strategic goals are organized into four distinct groups related to:

1. *Creation of new development poles and industries and consolidation of the touristic offer;*
2. *Increase of the added value and impact of the sector on the economy and employment;*
3. *Development of new tourism products and services and improved quality;*
4. *Improvement of the country's image and promotion of local products*

Further, these goals are broken into a total of fifteen specific objectives,

Adventure tourisms in the current strategy is included under the category of natural tourism, which includes development of rural tourism, mountain tourism, ecotourism and outdoor activities (rafting, parachuting, mountain biking, fishing, trekking, mountaineering, hiking, horseback riding, study tours, etc.).

4.2. Bosnia and Herzegovina

The Tourism Development Strategy of the Republika Srpska for the period 2011–2020 is a strategic document on medium-term tourism development on the basis of which the Ministry of Trade and Tourism in the Government of the Republika Srpska implements defined activities in order to achieve strategic goals of tourism development.

Strategic goals are aimed at:

- Improving the quality of the tourist product;
- Improving conditions for tourism development;
- Increasing the volume of tourist traffic;
- Developing a tourism product based on sustainable development.

The commitment of the Republika Srpska to the strategy of integrated development of self-sustainable tourism requires the involvement of institutions of all levels and areas, i.e., the participation of all relevant public and private sector entities, as well as the local population.

The Tourism Development Strategy for the Federation of Bosnia and Herzegovina 2008-2018 sets two main goals:

- That the development of tourism is significantly informed according to the principles of sustainability, respecting the interests and needs of residents;
- Build a positive international image and the image of a tourist destination in Bosnia and Herzegovina.

Unfortunately, this strategy was never adopted, nor was it implemented. In a conversation with representatives of the FBiH Ministry of Environmental Protection and Tourism, we were told that a new strategy is planned to be drafted, after the adoption of the new Law on Tourism in the Federation of BiH by the end of 2020.

If we start from the tourist offer based on attraction, transport, accommodation, infrastructure, trade, catering and other activities, it is clear that the development of tourism affects the overall economic development of the country. Therefore, it is evident

that the coordinating role of the strategy is vital, not only between the entities within Bosnia and Herzegovina but also with the countries of the Western Balkans region.

4.3. Serbia

The Tourism Development Strategy of the Republic of Serbia for the Period from 2016 to 2025 was prepared in accordance with Law on Tourism. As per the Strategy, vision of Tourism of the Republic of Serbia to 2025 is:

- 1) In 2025, the Republic of Serbia will become a globally recognised tourism destination as a result of the established development system and sustainable resource management and the coordination of the activities of all stakeholders of importance for the development of tourism;
- 2) Tourism and its related activities will become one of the dominant economic sectors, effectively providing new added value and sustainable employment and contributing significantly to local and regional development;
- 3) The tourism sector of the Republic of Serbia will be able to efficiently and flexibly adjust its offer to modern trends in the global tourism market and offer

authentic experiences, events and high quality products, which will, coupled with the traditional hospitality, serve as a basis of recognition over the competition;

4) Tourism will become the leading promoter of Serbia's image in the world as a modern and desirable destination for leisure, holidays and business, playing a steady innovative part in the application of modern standards, new technologies and environmental protection;

5) Given its continuous modernisation, acceptance and adoption of global standards and models of business and management, tourism will become the preferred sector for employment and career development, particularly for young people;

6) The Republic of Serbia will become a high-ranking popular destination on the world scale of competitiveness in tourism.

The Tourism Development Strategy of the Republic of Serbia also includes adventure tourism among the promising types of tourism. Several factors influence such a perception of the importance of this type of tourism: during the last decades, adventure tourism has recorded very rapid development, Serbia as a mountainous country has favourable natural prerequisites for this type of tourism, to name but two. The success of Serbia as a new destination of

adventure tourism depends mainly on a well-conceived development strategy based on an analysis of all segments of tourist demand and a range of activities relevant to adventure tourism.

V. IMPEDIMENT

The tourism sector is known for its ability to create jobs and generate foreign exchange, and as such, many local authorities seek to encourage tourism activities and attract visitors. In particular, adventure tourism is attracting attention for its emphasis on rural areas, local culture, and because it can often be developed within existing infrastructure. Often, it's the presence of visitors that makes it a destination, rather than destinations seeking to create a tourism activity. However, even with these benefits there are certain condition that must be present for market development.

1. Inadequate infrastructure.

In less developed economies such as, Albania, Bosnia and Herzegovina and Serbia, the existing infrastructure is inadequate and makes it difficult to reap the benefits of comparative advantage. The goals of overall development are to build the infrastructure that is essential for

economic growth. Tourism and its needs are, therefore, decisive factors in development. The construction of infrastructure needed to make the tourist region or locality accessible will stimulate the regional economy by creating demand for industry and local services. Equally important is the infrastructure at the destination, which includes electric and sewer networks, parking, etc. Last, but not least, there is the stimulation of tourist infrastructure, such as adventure tourism centers, etc.

2. *Lack of skilled workforce*

In the adventure tourism sector, when it comes to workforce skills, the situation is quite complicated. On the one hand, there are many subtypes of adventure tourism, and each of these subtypes needs specific guides who have undergone specific training. The current situation is such that many people are engaged in these occupations, but do not have a license. The reason for this situation is that individuals work illegally, and do not want to be licensed because these types of jobs are seasonal and low paid. At the same time, the reason is more the fact that the licensing process itself requires many preconditions and actions.

Unfortunately, due to the job's responsibility, low salaries, and the fact that it is a seasonal job, many young people migrate. Due to the disorder of the

system, those who do these jobs often do not meet the necessary criteria and do not have all the required qualifications, such as a good knowledge of at least one foreign language.

In addition, there is a lack of quality training in adventure tourism, especially in the security segment, which is very important for this area. The sector's success hinges on how well it creates, implements, and monitors standards in safety, quality, professionalism, sustainability, and environmental conservation.

3. *Inconsistent legislation*

Unfortunately, development of adventure tourism does not draw much attention in none of three economies. Adventure tourism is not even mentioned in the Law on Tourism of Albania and Serbia. Adventure tourism is not recognized by the Law on Tourism neither in the Republika Srpska under that name, but as "tourist services that need sports and recreational activities," and the planning and development of tourist services is defined in the same way as for other forms of tourism.

According to the Tourism Development Strategy of Serbia, the segment of adventure tourism is included in the combination of special interests, identified as one of the tourist products of priority that Serbia

should invest in, because with regard to the natural resources of Serbia, there is excellent potential for development of this tourist product.

Inconsistent legislation in the entities is one of the many factors that slow down the development of tourism in B&H. The reason why the entity laws have not been harmonized even after several years is the "lack of political will," as we were told in the Federation of B&H Ministry of Environmental Protection and Tourism.

VI. RECOMMENDATION

The three economies would appear to offer many of the activities and settings that adventure travelers have indicated as desirable, or that influence their destination selection, and are well positioned to capture their business. The area possesses:

- an extremely attractive physical setting
- several protected area that supports a healthy ecosystem and will not be given over to other uses, thus providing stability for tour operators
- diverse wildlife populations
- trails for hiking, biking, trail riding and rivers for

rafting, canoeing, and kayaking at a variety of skill levels

- accommodation suitable for adventure travelers

But in order to increase the role of Adventure tourism sector in three economies, we recommend the following:

1. Prioritization of the sector.

Policy officials at high level need to recognize the potential of the tourism sector and prioritize it accordingly. Looking at the Travel & Tourism Competitiveness Report 2019, among three economies, in the sub-index: Prioritization of Travel & Tourism, only Albania scored 5.0, ranking the 43rd among 140 countries. Bosnia and Herzegovina scored 4.1 ranking the 104th among 140 countries, while Serbia scored 3.9 ranking in the 109/140 place. Prioritizing tourism requires dedicated institutions that oversee tourism promotion and development at a national level. As a niche market segment, Adventure Tourism should be given representation within the tourism institutions. Investing in research on target adventure markets, adventure trends, products with potential, and sharing that information with the private sector will further demonstrate the prioritization of the adventure sector and encourage public-private

partnerships that result in a healthy adventure sector.

2. Increasing Marketing activities.

The three economies currently have the whole range of adventure products, such as, rafting, hiking, trail riding, kayaking, wildlife viewing, photography and snowmobiling. Three economies must also deal with its lack of name recognition among adventure tourists. This can be done by increasing those marketing activities that promote the region as a destination that offers a whole range of adventure products in one scenic setting, or a chance to experience the undiscovered. It is important to convey the sense of challenge and unique experience available in the area. It may also be helpful to include the affordable nature of many of its experiences in marketing messages. Many of these activities are available through tour operators or can be done on a self-guided basis, although equipment rentals are limited. A number of operators provides some activities such as trail riding. With the market potential that exists, the attractiveness of the activities and the setting, there are many opportunities to increase capacity with appropriate product and market development.

3. Increasing the accommodation capacities

Accommodation is adequate by adventure travel standards, although at times, fully booked. Concerns have been expressed about the quantity and range of accommodation available, but experience shows that the adventure traveler is by nature, more flexible in accepting lower quality supporting facilities if the core experience is unique or well delivered. Thus, the structure currently exists to compete as an adventure destination but there may be opportunities for future development.

4. *Cooperation between economies and promoting integrated tourism products*

Another opportunity for the three economies and for the WB6 region is to combine tourist attractions and activities into consolidated tourism products and promote them as regional products in the European and global markets. The promotion of the region as a safe and welcoming tourist destination, with a consolidated tourist offer and authentic products is closely related to this element.

Successful cross-border tourism initiatives such as Via Dinarica show the potential for tourism development around shared themes and routes. Improvements in this area will not only lead to reconciliation and stabilization in the post-conflict region, but also to an improved business environment in which networks, agreements and

partnerships, will lead to accelerated business growth, including tourism.

5. Establishing an efficient system of continuous professional training of human resources engaged in tourism

The expected increase in the number of tourists will put increasing pressure on human resources and especially on the quality of services. Tackling tourism massiveness will be a challenge and for this we have to set up an efficient vocational training system that will enable continuous training for staff of accommodation and restaurant facilities, for tourist guides and so on for all other providers of services, enabling them to improve their quality.

In order to promote and develop adventure tourism, it is necessary to establish a firmer functional link between the Ministries responsible for tourism in each economy and the Tourist Organisations and local tourist agencies. Mountaineering societies, sports clubs and non-governmental organizations should be supported in promoting this type of tourism.

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