Study Tour Report
04.02.17 – 11.02.17

Macedonia, Albania and Montenegro

Master in International Tourism (MT)
University of Lugano (USI)
MT Class 2015 - 2017
1. Introduction

By Camille Perry

At the end of their study curriculum, students of the Master’s program in International Tourism organize a study tour to a destination they decide on collectively, with the approval of the Master’s Director, Professor Rico Maggi.

The study tour is an academic trip with the aim of helping students understand how the knowledge acquired during the program can be applied to real-life situations. This is done through the students organizing the whole trip themselves, as well as through the meetings they plan with professionals already working in the industry.

The mindset of the study tour is firstly educational with the focus on enabling students to think critically regarding various issues, presented by professionals working in various tourism-related positions. Indeed, the knowledge gained within the time of the study curriculum makes each individual student an expert in the field of International Tourism, enabling them to critically and innovatively approach the challenges touristic destinations are facing, whether they are established or emerging destinations. This in turn enables a fruitful argumentation between the professionals and the experts that may result in new, creative and innovative ideas.

In February 2017, students of the Master’s program in International Tourism organized a study tour to Macedonia and Montenegro via Albania, under the supervision of the Director of the Master’s Program Dr. Rico Maggi and the programme coordinator Eva Vroegop. For planning purposes, the class was subdivided into several groups, with each group being responsible for planning a full day of the study tour program, with reference to a specific topic and with various tourism professionals working in the destination.

Another group was in charge of the tour’s logistics, from the group’s departure to its arrival back in Lugano. This includes booking accommodation for all participants and managing the transportation aspects of the study tour.

Two full days were spent in Macedonia’s capital, Skopje. This was followed by one day of bus travel through the Macedonian city of Ohrid, and across the Macedonia-Albanian border, to the capital city of Albania, Tirana. The study tour was concluded by two full days in Montenegro, through various cities, including Radovici, Tivat, and Budva.

Each of the “meeting days” was organized around a main topic or thematic. The themes that were dealt with along the week are as follows: Travel agencies and their MICE activities in Skopje, transboundary cooperation between Macedonia and Albania, the development of luxury tourism in Montenegro and domestic tourism organization.
# 1.1 Study Tour Itinerary

## Organizing groups:

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<td>Laura Kolly</td>
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<td>Shuyi Liu</td>
<td>Jean-Raphaël Gualandris</td>
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<td>Kohl &amp; Partner, University of Tourism and Management, Bulvar Partizanski Odrizi 99</td>
<td>National Institution for Protection of Monuments of Culture and Museum</td>
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<td>17:00</td>
<td>BYG - SKP 17.10 - 19.05</td>
<td>Macedonian Travel Story/Hotel Mramor, Kleonci 11, Skopje 1000</td>
<td>Free walking tour in Skopje, departure from Mother Theresa Memorial House</td>
<td>Albanian National Tourism Agency, Tirana</td>
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2. Macedonia  
By Camille Perry & Sarah de Vantéry

2.1 Tour Operators and MICE activities
On our second full day in Skopje, Macedonia, the group in charge organized four meetings with local Tour Operators with different areas of specialization and expertise. With those meetings, our main aims were to learn about Skopje as a leisure destination, how tourism offers and services are packaged and to whom, and also understand what the potential of MICE tourism to Skopje and more generally to Macedonia is.

2.1.1 Time for Macedonia
The first meeting of the study tour was planned with the tour operator Time for Macedonia, which specializes in planning and organizing journeys centered around the national cultural and historic heritage. Time for Macedonia representatives Bojan Pavlov and Ana Stojanovska joined us to discuss the company’s vision for the tourism industry in Macedonia, its way of operating, as well as some tourism-related topics specific to Macedonia.

Macedonia has traditionally been considered as a stopover destination for Balkan tourers. This typically translates into travelers concentrating their visits on a few highlight destinations such as Skopje and Ohrid over a couple of days, and little money spent on-site but rather directly to foreign tour operators. As Mrs Stojanovska and Mr Pavlov explained to us, Time for Macedonia has been dedicating its efforts to reversing this trend by actively promoting Macedonia as a standalone destination where travelers would stay longer, in turn increasing receipts and linkages to the benefit of local populations. They make sure that this strategy includes offering good quality products, especially in terms of safety and service.

NAITAM, the National Association for Incoming Tourism in Macedonia supports collaboration between Macedonian tourism stakeholders. What Macedonia Travel wishes for in the future is for more cooperation of the public and private sectors. This could translate into the creation of a legal, umbrella institution for national travel agencies to coordinate and promote Macedonia as one destination, as well as government subsidies to support initiatives and companies.

Another challenge that was brought up during our discussion is accessibility. As of now, flight options to Macedonia are quite restricted. Time for Macedonia believes that being able to offer customers direct flight connections with better service, in particular from and to main source markets, would be a great asset to the Macedonian tourism sector if it wishes to compete with other European destinations.

Part of the discussion was also to try and understand to what extent an entry of Macedonia into the European Union would benefit the country with regards to the tourism industry. According to our interlocutors, this would affect the country’s image abroad quite positively; by acting as a token of trust, safety and security, it would considerably reduce risk perception and uncertainty toward the country as a touristic destination. Practically, Macedonia’s dental tourism, which is increasingly being advertised, could gain more recognition abroad as a result of complying with European Union’s health and safety regulations.
It was an overall very informative meeting, which not only enabled the students to learn more about Time for Macedonia’s activity, but also was also quite useful in understanding the dynamics of the national tourism industry and the challenges it faces.

2.1.2 Macedonia Travel
Macedonia Travel was our second meeting scheduled on February 6th. In short, it is a Tour Operator that was launched in 2004 by travel business professionals. We met with founder and managing director Emilija Fildishevska, who discussed topics, such as the company’s evolution since its creation as well as its highlight products with us.

This meeting was a great contrast to the first in terms of how both travel agencies operate and wish to promote Macedonia. Being a relatively young, small inland country, it can be quite difficult to promote itself on its own and compete as a touristic destination on the global level. This why Mrs Fildishevska wishes for her company to not only promote Macedonia itself but also and primarily promote it as a Balkan destination. She believes connecting Macedonia to the rest of the region and collaborating with neighboring countries allows for increased interest in the whole region through richer and more comprehensive products. Her deciding to dismiss political matters from the company’s operations allows Macedonia Travel to smoothly collaborate with tourism stakeholders in other Balkan countries.

At the time of its foundation, the agency was fully dedicated to corporate travel and events. As Mrs. Fildishevska pointed out, competition in the corporate market has tremendously increased over the past years, in great part due to the Internet and airlines providing similar, cheaper services. She believes companies have also become more quality-driven and their willingness to pay has increased accordingly, pushing some of them to seek out new destinations renowned for their first-class service. This decrease in corporate demand turned out to be an opportunity for Macedonia Travel, which has extended its activity to leisure tourism services. It currently specializes in arranging adventure and responsible tourism, for which the Americans represent a considerable part of the demand. For this purpose, it seeks to support local communities by actively educating them to the benefits of tourism and engaging them in touristic activities. A practical example of this dedication is how they are involving local single mothers, for instance teaching them how to hand make cosmetic products to be sold to travelers.

Thanks to cheaper flight connections to Macedonia, European travelers especially have, according to Mrs Fildishevska, become more willing to visit the country. This is an opportunity for Macedonia Travel to come forward and promote Macedonia as a next-door alternative to the already known and established destinations, therefore giving it some exoticness.

2.1.3 Forester – Hunting in Macedonia
Our third meeting of the day was with a specialized Tour Operator; in his own words, the founder of Forester - Hunting in Macedonia, Paulo Marques, describes his activity as a young company evolving to a travel agency whose current focus is to develop hunting concessions in the vicinity of Skopje. His base of clients is mostly composed of Macedonian hunters and he has started to develop contact with partner agencies in Macedonia, Greece and Italy in order to reach further potential customers. This meeting was for us the occasion to get a different insight from that of traditional
leisure travel agencies, on how an individual is leveraging on one of Macedonia’s natural resources and managing it into tourism in order to attract a very specific kind of clientele with tailored services.

Mr. Marques’ aim is not only to found a profitable business, but one that will prove sustainable in the long run. He highlighted his desire to educate people, whether tourists or locals, clients and non-clients, to the activity of hunting and to the respect of nature and the environment while doing so. In order to gain understanding of hunting on a wider scale, he also lobbies with hunting associations. Creating a sustainable activity is an ongoing and demanding process which requires for example that he feed the game to growth capacity, that he prevent poaching on his concessions, that cultural aspects such as pollution be addressed for his concessions to remain clean and safe, that he maintain an equilibrium between his game population and the number of clients he brings into his concessions, and so on.

We thought to ask Mr. Marques whether offering B2B services, for example hunting parties as a team-building activity could be an interesting product to develop in order to diversify his offer. This would however require more infrastructure and game, which doesn’t seem to be a realistic option as he is only just starting his activity. Smaller groups remain for now the preferable option.

As a foreigner in Macedonia and what’s more starting a business, which can stir up opposition due to ethical reasons, Paulo’s testimony also goes to show the power of the community in backing up projects. He has very much highlighted how integrating within its local environment by creating a relationship with the locals and educating them has helped him gain understanding and trust of the locals towards his activity. The support of the community also guarantees one of his main channels of advertising, which is word-of-mouth, completed with being present at fairs and on social media. As of now, Forester – Hunting in Macedonia represents a side activity to Mr. Marques, who has ideas to develop the business further. With very few clients in the spring and summer seasons, he is now looking for solutions that would help decrease seasonality and attract visitors in the currently low periods.

2.1.4 Macedonia Travel Story/Hotel Mramor

Our final meeting of the day was with the newly founded Tour Operator Macedonian Travel Story, where we met Mrs. Gordana Zrinj, one of the four owners of Hotel Mramor. At the origin of this agency is family Petkovski, which started in the tourism industry in 1995 as Hotel Mramor. As a result of permanent growth, they decided to start their own tourist agency, consequently growing from a small family-run hotel to two complementary businesses operating in the tourism industry.

As the first private hotel to have opened its doors in Skopje, Hotel Mramor is deeply connected within the local tourism industry, with many friends, partners, loyal clientele and expertise working as a buffer and competitive advantage against other hotels. They especially value direct feedback from their customers to conduct research, learn and grow. Mrs. Zrinj believes this is what has allowed Hotel Mramor to always be able to keep up with new demand, expectations, and trends, and be proactive in its field. As a local hotel with 20 years of operation and expertise, Hotel Mramor has seen first-hand the changes in trends when it comes to who visits Skopje, what motivates their trip, etc. It has for example noticed a considerable increase in arrivals of both leisure and business tourists, following the completion of “Skopje 2014”, a disputed project financed by the national government to give the capital a more classical appeal. Hotel Mramor’s staff has also taken notice
of how the Internet has made tourists more knowledgeable about their destinations, with many of them arriving to Hotel Mramor completely prepared for they stay in Skopje and needing little additional information. With regards to business tourism, Mrs. Zrinyi believes that Macedonia being at the crossroads between neighboring countries explains a lot of the corporate demand the hotel gets.

From year to year, Mrs. Zrinyi has also noticed a pattern related to the country's primary religion. Orthodox Christians make up for about 65% of the population of the Republic of Macedonia¹. According to Mrs. Zrinyi, the hotel as well as other tourism service providers in Skopje, are able to make up for low international arrivals in the early months of the year thanks to domestic arrivals. It is indeed apparently common for Macedonians to travel to big cities during the Orthodox holidays for some shopping and other activities. This will usually include at least a one-night stop in the capital city.

Hotel Mramor, and now newly-founded Macedonian Travel Story, which are both represented under the name “THE STORY”, can rely on their loyal clientele for promotion, but they also take full advantage of other channels of promotion to spread the word about their services and seek out potential customers: they promote actively on domestic newspapers, TV and radio, social media, and sponsor municipality events. The company’s website and social media channel Facebook have proven especially useful in the past years, with a considerable number of travelers contacting them directly to make reservations instead of going through the many booking portals that are now available.

2.2 Tourism Management Skopje

2.2.1 Swisscontact

On Tuesday, we first met with Mrs. Ivanova and Mr. Todorovski from “Swisscontact”, a business-oriented and independent foundation whose main objective is international development², and which promotes economic, social and environmental development. In Macedonia, one of Swisscontact’s current projects is to increase market employability (IME), which aims at both raising the ratio of higher-qualified workers by improving people’s skills and knowledge, and increasing the access to tourism jobs especially for women. The support they offer is not financial but technical, and includes activities such as helping and accompanying tourism suppliers along the development of campaigns for their future touristic seasons.

Swisscontact’s course of action is closely related to the Master in Tourism program, as the foundation’s main approach for tourism development is the “St-Gallen Model”, a methodology we studied in Destination Management. The model is designed to investigate the dynamics of the markets, and to better map and reorganize the destination. Besides, Swisscontact stresses the need for a shift of paradigm to take place, namely going from a product centric approach to a customer oriented one, in order to better address the needs arising from the actual tourism demand. This is even more important, as there is neither DMO nor national tourism organization in Macedonia.

As Macedonia bears a significant natural potential, Swisscontact chose to focus on supporting adventure tourism suppliers, in locations with a low ratio of business companies and high unemployment, such as Mavrovo or Kruševko. The foundation is also active in Ohrid, which is a successful example of a development model to follow and upon which to develop other destinations. For instance, Swisscontact cooperates and works with the local port authorities of Ohrid to develop services and infrastructure for the visitors.

Our meeting with Swisscontact gave us a better idea of the challenges faced by the country regarding the development of a tourism industry in Macedonia, among which the threat of emigration and a strong lack in professional skills, standards, stakeholders’ cooperation, sustainability, and profitability, which Swisscontact is trying to help overcome. Nevertheless, we would have found it more enriching to receive concrete details and examples of Swisscontact’s actions to get a better idea on how their approach is effectively implemented, along with the different steps through which the on-site participation takes place. Moreover, Swisscontact should focus its actions at a limited level such as training and empowering people locally in order to get concrete results. Otherwise, its contribution won’t be that effective and the overall economic impact will be insignificant.

2.2.2 Kohl & Partner

Our second meeting of the day was with Mr. Ivanovski, the Macedonian partner of the Austrian consulting company “Kohl & Partner” which is specialized in hotel and tourism development consultancy. The company was commissioned by the Ministry of Economy to create Macedonia’s national tourism strategy for the years 2016-2021, and it was designed in cooperation with Mr. Ivanoski from VeVe Group. The strategy is an extension of the 2009-2013 strategies, but also takes into consideration new goals to reach. It has however not been implemented yet due to the ongoing political instability.

The new strategy’s main actions include the creation of a National Tourism Organisation; with the idea to group every tourism concern under one single entity. For the time being, the government has not agreed to create a central DMO. The strategy also focuses on highlighting Turkish monuments and legacy in order to enhance cultural tourism, which has the potential to attract Turkish visitors whose proximity with Macedonia is an advantage. In addition, the strategy stresses that developing international tourism rather than the domestic one should be a priority. As a result, Kohl & Partner’s strategy seeks to give more visibility to the country abroad and to find a way to present it and recommend it as a brand. Consequently, Macedonia’s branding would develop around the three core assets the country has to offer: city, culture, and lake tourism. This is why Mr. Ivanovski presented Skopje and Ohrid as the most important destinations of Macedonia for the years to come. Thus, according to him, leisure tourists are to be targeted first, and the products and services offered are to be widened, for example by combining destinations through offering tours to neighbouring countries.

4 Regional consulting and business group – www.vevegroup.com
The meeting with the representative of Kohl & Partner illustrated well the desire of the Macedonian government to invest in re-branding and promoting the country as an attractive destination. Yet, the country’s ambition to develop new products such as ski resorts further grows the gap between existing infrastructures that could be better used at a lower cost, and prospective ones that might come at a much higher cost and not necessarily bring benefits. Furthermore, the government’s choice to invest enormous amounts in tourism promotion and new touristic products such as city tourism and the project “Skopje 2014” contrasts strikingly with the actual state of the country: on the one hand Macedonia is already being promoted, while on the other hand the country itself as a destination is not prepared yet.

2.2.3 University of Tourism and Management Skopje (UTMS)
Meeting representatives of the private University of Tourism and Management Skopje was for us an opportunity to get an academic perspective on tourism in Macedonia. We were taught that although there is no Ministry of Tourism in Macedonia, tourism is organized around three different entities: The Committee of Tourism, which acts as a coordinator between the ministries and public authorities, The Ministry of Economy, which has a department devoted to tourism, and The Agency for Promotion and Support of Tourism, which was created in 2008 and whose objectives are to establish and promote Macedonia as a destination, along with the goal of increasing the number of incoming international tourists.

The state’s interest in tourism has thus been growing since 2008 and many incentives are created in order to boost tourism, such as giving travel agencies subsidies for foreign tourists, improving the infrastructures, supporting the creation of new tourism products, and developing touristic zones to attract foreign investors. The number of foreign tourists did increase (except for the year 2016 when Macedonia was caught up in the refugee crisis), while the domestic market remains stable.

One of the first strategies to attract more tourists was to develop city tourism, as well as to aim at a balance of arrivals throughout the year, despite the seasonality characterizing tourism in Macedonia. Consequently, there have been huge investments in the city of Skopje, which has undergone a facelift since 2014 in order to create landmarks fulfilling two objectives: establishing the identity of Macedonia around nation-building, and providing the city with attractions that have the potential to attract tourists to the city. This has however caused tensions with the local population who feels that the city’s historical and cultural heritage has not been preserved the right way.

Despite getting a good overview of the Macedonian tourism industry, our limited time with UTMS did not allow us to get into a more detailed discussion around the strengths and weaknesses of tourism development in Macedonia, along with the many assets the country has to offer. Knowing that half of the graduates in tourism emigrate in the hope of getting better working conditions and higher salaries, we unfortunately did not get any insight as to how the university prepares its students to become professionals and stay to work in their country, hence raising the percentage of skilled tourism workers in Macedonia.

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2.3 Improvements of Transboundary Cooperation for the Protection of Heritage

2.3.1 National Institution for Protection of Monuments (Ohrid)

Our last meeting in Macedonia took place close to the border with Albania in the city of Ohrid, on the shores of the lake bearing its name. The UNESCO listed Ohrid, whose lake is one of the world’s oldest and presents one of the richest bio-diversities in Europe, as a natural world heritage site in 1979 and as a cultural heritage site the following year, owing to its typical architecture and rich history.

Encountering Mr. Patcev, an architect working for the “National Institution for Protection of Monuments of Culture and Museum in Ohrid” made us become aware of the challenges regarding the protection of the area in order to maintain its world heritage status. Additionally, it enlightened us on the need to develop a form of sustainable tourism through a transnational collaboration with Albania, who is currently preparing the application of its side of the lake to also be under the protection of the UNESCO.

Ohrid being protected by the UNESCO certainly is an advantage for the development of tourism in Macedonia. However, benefitting from a protected area status brings with it many threats, as urban development can’t be fully controlled and habitat alteration may occur in spite of strict regulations regarding the (re) construction or restoration of houses. As a consequence, Ohrid could lose its uniqueness and authenticity thanks to which it was recognized as a cultural world heritage site.

Furthermore, the peculiarity of Ohrid is the reason why it attracts so many visitors, damaging it would mean impacting the tourism industry, and therefore the economy as well. Yet, at the same time, infrastructure development to serve tourism purposes, as well as intensive tourism activities also threaten the region’s heritage; hence the importance of developing sustainable tourism.

Consequently, the European Union funded the project “Towards strengthened governance of the shared transboundary natural and cultural heritage of the Lake Ohrid region”, designed to support both Macedonia and Albania in their attempt to protect the area through a sustainable development approach.

Taking into account that Ohrid is the tourism capital of Macedonia, this last meeting summarized accurately our learnings about Macedonia: namely, that Macedonia has a consequent potential in developing tourism, to the extent that it is effectively implemented and managed. Nevertheless, Macedonia faces many threats and challenges, whether they be lack in management control regarding the development of tourist infrastructures, or the over-development of tourism offers that may lead to over crowdedness and a shortage in tourist facilities. Moreover, the ongoing political instability and the absence of a national tourism entity hinder a controlled and well-conducted development of tourism at a national level.

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6 http://whc.unesco.org/en/lake-ohrid-region
With regards to their stay and tourism-related encounters in Macedonia, the students’ main takeaways are:

- Uneven financial distribution
  - Strong investment in promotion rather than facilities, salaries, and life standards

- Fragmented industry
  - Political instability hinders the well-conducted management of tourism under one single entity
3. Albania
By Laura Kolly

3.1 Challenges and opportunities of a new travel destination
Albania’s history of foreign domination and occupation has resulted in a late opening of the country to visitors, twenty years ago. Albania gained its independence from the Ottoman Empire only in 1912 and was occupied by different countries during its first years as a modern state. Since the Second World War, the small Mediterranean country was under a strict communist government which used “terror, nationalism and isolation” to keep its power the longest possible. It is therefore not surprising that Albania is still little known and often being nicknamed as “The new pearl of the Balkans” or “Europe’s last secret”.

Albania has been seen for decades as a no-go area. However, recently, the government has been strongly involved in developing tourism and attracting investment. For instance, the new Mother Teresa international airport that opened in 2008. Tourism represents an important part of Albania’s economy. The total contribution of Travel & Tourism to GDP was of 26.0% in 2016 and is expected to rise by 6.1 % by 2027 (33.0% of GDP). This is one of the reasons why, in December 2016, the World Bank lent Albania $71 million to improve its tourism infrastructure in four UNESCO heritage towns in order to attract more foreign tourists.

The young country is expected to reach 4,261,000 international tourist arrivals in 2017. Since 2010, Albania is often listed as one of the best place to visit. For instance, CNN described Albania as “sunny, cheap and with mile after mile of pristine beaches and unspoiled wilderness”.

3.1.1 Albanian National Tourism Agency (Tirana)
After our last meeting in Ohrid on Wednesday morning, we left Macedonia and reached a new country, Albania. We had a tight time schedule, which only allowed us to spend one night in Tirana, the capital of Albania. A late meeting was organised at the Albanian National Tourism Agency, a public state company that is under the Ministry of Economic Development, Tourism, Trade and Entrepreneurship. We met with Mr. Ardit Collaku, director of the Agency, and Mr. Sokol Koçiaj.

The presentation of Albania as a tourist destination helped us to get an overview of the country recent challenges and opportunities. We quickly understood that the government has made tourism one of its top priorities. Albania is therefore growing very fast as a travel destination. One of Albania’s main opportunities is its accessibility. Indeed, Albania is very close to the most important European capitals and has a new modern international airport, offering many connections. Regional tourism (mainly Kosovo, Macedonia, Montenegro and Greece) represents also an

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8 Gloyer, G. Albania p.7
9 Ibid
10 https://www.travelnews.ch/english-corner/3175-albania-the-next-big-thing.html
12 http://www.reuters.com/article/us-worldbank-albania-idUSKBN1422FD
13 Only 1,062,000 in 2007
important part of Albania tourist arrivals. One of the reasons is the country’s accessibility to the sea, but also its wide range of natural and cultural attractions.

The country has a great potential in terms of cultural and natural heritage, there are two UNESCO sites (Butrint and the Historic Centres of Berat and Gjirokastra). Moreover, the country has many assets that can please different type of tourists. For instance, the mountains are suitable for outdoor sports; sandy beaches attract families but also honeymooners and youngsters. Religion plays also an important role in Albania’s tourism. Indeed, it is an important place for pilgrimage. One of the main reason is the heritage of Madre Teresa that Albania shares with its neighbouring country, Macedonia.

After the opening of the country, the government has followed three different tourism strategy. The first step, after the opening of the country in 1983, was to increase the number of tourists. In 1997, because of domestic instability, the tourists’ arrivals decreased and Albania implemented a strategy of recovery. Recently, Albania is very good in promotion using an aggressive marketing. For instance, the National Tourism Agency’s last promotional activity was the “Branding Albania” contest. The new logo and slogan “Albania – go your own way” is used by all state institutions to symbolise Albanian branding logo internationally.

Mr. Ardit Collaku also explained us that Albania is facing some challenges. Since 2000, the National Tourism Agency has invested considerable effort and energy in finding solution to avoid daily tourists and thus increase the number of overnights. Furthermore, seasonality is also one of their main concerns. They plan to build a ski resort in order to attract tourists during winter season.

For Albania, the students’ main takeaways are the following:

- Tourism has been a priority for the government over the last decade. It is one of the leading economic sectors in the country (total contribution to GDP was of 26.0% in 2016).

- Albania is using an aggressive marketing to promote its cultural and natural heritage internationally.

- Albania’s main challenges are the limited number of overnights and seasonality. One of the National Agency’s solutions is to develop tourism during the winter season.
4. Montenegro
By Rihan Wu & Shuyi Liu

4.1 Luxury Tourism

4.1.1 Orascom / Luštica Bay (Radovici)
The first meeting we had in Montenegro was with Orascom, a global engineering and construction contractor primarily focused on infrastructure, industrial and high-end commercial projects. Orascom operates a total of 35 hotels with 8,016 rooms in 8 countries. Luštica Bay is the subsidiary of Orascom. This project is developing a fully integrated, self-sufficient and luxury touristic destination on the Montenegrin Adriatic coast, placed a short distance from three international airports (only 10 km from Tivat airport and Podgorica 90 km and Ćilipi - Dubrovnik 46 km). The company concluded the lease and development agreement with the Government of Montenegro in 2009. Lustica Bay project started in 2013 and the total investment is 1.1 billion Euros until now. After 25 years’ construction, it is about to become a community with 10000 inhabitants.

The goal of Luštica Bay is to create a distinct community, within a self-sufficient setting, where residents can create a home around the life they want to live. The integrated project is planned to offer residential units, 7 world class hotels, 2 marinas with mooring and docking support facilities. Golf courses with clubhouse, commercial facilities, and infrastructures will also be provided for the inhabitants. Orascom is implementing the same projects in other countries and until now it is the biggest project done in this part of Europe.

In terms of sustainability, Luštica Bay is a pioneer in Montenegro in sustainable development. Luštica Bay has won the certificate for excellence in sustainability as the first company in Europe to get such certificate. They ensure minimal impact to the nature. Fewer than 10 % of territory will be developed, safeguarding the area’s natural beauty and green spaces. For the construction, the company promised to use local materials and reference traditional architecture. Furthermore, Luštica Bay works with local neighbourhoods to create a strong community network such as community supported agriculture, a local market and efficient recycling systems to benefit the locals. Moreover, opportunity is also given to locals to purchase the space with a lower price.

We were taught that Luštica Bay is not just a tourism project but also a real estate project. Their segments are not billionaires, but upper-middle class including vacationers for a couple of days in the season, pensioners, 2nd home planners who come from Europe, Egypt, UK, US, Hong Kong and Lebanon. The price is about 4000€ per square meter which is not high in European perspective.

We also discussed about whether Mamula Island was a WWII concentration camp, which included as an additional project to the Lustica Bay. This place has been leased for 49 years and costs 15 million Euros for renovation. Even though, the operator has promised to preserve the architectural design and its history. There is still a huge debate about the island. We were also told that all those debate about Mamula Island could be used as a promotion tool.

4.1.2 Regent Porto Montenegro (Tivat)
The second meeting of the day was with Regent Porto Montenegro. We met with the Senior PR and Marketing Manager -- Mr Danilo Kalezic. During his presentation, we know that Porto Montenegro
formerly known as military factory under Yugoslavia communism. In 90s, the military factory was shut down and began to create the new look for Montenegro. In 2005, the Canadian investor, Peter Munk, got 99 years lease and invested 23 Million to transform a previously historic naval base into a luxury yacht marina on the eastern Adriatic coast - Porto Montenegro. The first part of the Marina opened in June 2009, with a capacity of 85 berths for yachts from 12 to 100 meters. In 2010, the first residential-commercial building opened as part of the new marina. This project also brings large numbers of job opportunities, until now Porto Montenegro employs 350 people and engages 1000 locals. The Regent hotel opened in 2014 and was the first international franchise in Montenegro.

The main products of Porto Montenegro are the rentals and leasing of berths, most of the rentals are up to 30 yrs. The winter occupancy rate reaches 70-75% and the leased berth occupancy rate reaches 40%, which are relatively high in off-season. In order to attract more customers and provide better service, Porto Montenegro launched a Visit Montenegro App recently. When talked about the relationship with other foreign investment, Mr Kalezic told us they are exhibiting together at fairs and wish more co-production and co-branding.

The government has implemented many laws to protect the country’s natural resources against the potentially harmful effects of mass tourism. Porto Montenegro shares this ecologically progressive stance and recognises that responsible tourism is about protecting the nature. So Porto Montenegro announced a pilot partnership with the Seabin Project, a revolution in sea cleaning technology. The Seabin collects all floating rubbish, oils, fuel and detergents, and helps create a cleaner sea with a healthier marine life. Moreover, the company continues to improve the quality of education in the local community, and has funded the renovation of the Geography classroom in the Mixed High School Mladost in Tivat. The Corporate Social Responsibility project has donated 100’000 Euro to support local educational institutions and scholarships for best students.

4.1.3 Aman Sveti Stefan (Budva)
On our last meeting of the day, we were warmly welcomed by Mrs. Radjenovic from Aman Sveti Stefan. She gave us a presentation about the brief history of Aman Sveti Stefan and the culture of Aman Resorts. Aman was founded in Phuket in 1988, embracing 31 resorts, hotels, and private residences in 20 countries today. Aman Sveti Stefan is the first Aman hotel in Europe and the first international brand in Montenegro. This project was completed in 2009 and operating under a 30-years lease. At beginning of 15th century, this is an island with 12 families and a church. Now, the resort in total contains 50 rooms, cottages and suites on the island and 8 grand suites at the Villa Miločer. This resort is highly guest oriented and the staff count is typically four staff to one guest. There is no reception desk, lobby or bellboys. Guest accommodation is typically provided in individual private villas, which have private pools and outdoor lounging and dining areas.

Among Aman resorts, each resort destinations is unique and each guest comes for the story of the place. Majority of the guests are from America, UK and Russia and mostly repeating guests. The high season is from 1st May to 1st October and the price of the room has 8 categories: from 1100 – 5000 €. Average stay of the client is 3-4 days. They also provide special excursions for the guest, which are held by the hotel.

In the beginning, most of the employees at Aman Sveti Stefan were foreigners, but today most of them are locals - only 10% are foreigners. Aman encourages staff to exchange. They sent their staff
to different Aman resort where the staff can learn new things from different culture and put it into practice. Aman keeps even its staff during the winter (off season), while part of the hotel is closed. In this way they can keep the best performers at their hotel. However, the maintenance cost is huge not only for the salary but also taking care of the 32 hectares, and 800 olive trees.

Overcoming seasonality is also a challenge for Aman Sveti Stefan. The Manager told us that “Budva has overdeveloped in the last 20 years and it dominated by mass tourism. Now, with the cooperating sales and marketing office in London, it has 60 % average occupancy through the year. In order to overcome seasonality, the operators need supports of the government. The destination needs more flights and activities to get more guests and extend the hot season. So government must open doors to more international airlines.”

At the end of the discussion, we talked about competition among the companies in tourism industry in Montenegro. Mrs. Radjenovic told us that they were happy to have the other companies. For example, Porto Montenegro was the face of modern Montenegro and built a very positive image for public relation. They also believed that guests bring guests so they were happy about the increasing numbers of international hotels in Montenegro. She said the tourism industry needs more collaboration than competition.

4.2 Destination Management Organization

4.2.1 Ministry of Sustainable Development and Tourism (Podgorica)

The first meeting of the day was with the director of the department for tourism destination management at Ministry of Sustainable Development and Tourism -- Marko Petricevic. The ministry of tourism is responsible for designing policies and regulative framework in the areas of tourism climate change. Montenegro is a small country with plenty of tourism resources, such as the Porto Montenegro; the Lustica Bay and the old city (Kotor is very attractive) with big beaches. The government plans to develop their tourism, therefore from 2005 till 2010, 10 billion Euros was invested in the tourism industry and it has been a huge success. Tourism greatly promoted the development of the economy; the income from tourism starting 2006 was 220 million euro and increased to 900 million Euros.

In Montenegro, 95% of tourists is foreign tourists and only 5% of tourists are domestic tourists, which brings 20% of GDP from tourism and 3-5% tourism growth every year. So they put more efforts in the foreign tourists, and 50% of tourists are overnight tourists. In recent years, Montenegro started to be interested in the cruise industry and has more than 400 cruise ships. Cruise ship tourism enabled Montenegro to gain visibility and to develop Porto Bar for cruise ship. But the next few years, because of the sustainable tourism development, the company will decrease the quantities of cruise ships. During this year, Montenegro has started to develop the rural area and agricultural industry tourism in order to give young people more chance to come and go from other cities.

There are two airports in Montenegro - Podgorica and Tivat - and they are trying to boost airline connections, so they get lots of benefits through the government to develop the air travel, such as the government will pay for the remaining seat in order to decrease the loss of the airport
companies, at the same time, they increase the national airline and want to attract more foreign low-cost airline. In the next 10 years the company will start the high road strategy, to increase the highway investment and from Kolashi to Podgorica the driving time will reduce from 2 hrs. to 30 min. This project is not only for the tourists but also for the locals. In Kolashi, the company plans to construct of big conference centers for involving hotels; and focus on the luxury tourism, which is related to beaches.

Besides these development and positive effects from tourism, there are also many problems in Montenegro’s tourism. They are not really know how to manage the mass tourism market and not ready to face the plenty of people to travel to the Montenegro, and at the same time here is no enough space for mass tourism. Poor quality is a big issue; they have to put great effort to overcome it. So it is important to talk and to educate people in tourism system, because young people can bring new quality in tourism. Luxury tourism has not much financial impact to the public sector.

All in all, Montenegro is a small country and they decided to go for tourism, as to them it is really relevant and it is taken seriously. Tourism has positive economic impact and development of promotion and product. They focus on luxury tourism, which is related to beaches, but they are not really clear regarding mass tourism and do not know what is going on with mass tourism.

4.2.2 National Tourism Organization of Montenegro (Podgorica)

Next, we met with the advisor to director of the National Tourism Organization of Montenegro -- Dusanka Pavicevic. The organization plans and carries out the tourism informational and promotional activities of Montenegro both in the country and abroad, creates the annual program for informational and promotional activities; follows and analyses trends on the domestic and international tourism markets and carries out tracking studies.

Montenegro is a small country in the Balkans, it’s a very open destination and from 2002 they started to use euro. It is one of the most interesting destinations in East Europe and has beautiful mountains and the longest beaches in Europe with Mediterranean climate. Montenegro owns the National Parks and the biggest lakes in Europe, which is important to bring investors in the land. Montenegro is opened to development and makes plans together with stakeholders. The main market of Montenegro is Europe 30%, 33% regional (Albania, Serbia), 30% Russia and 10% domestic. During the winter period the main market is regional and domestic; and during summer time the main market is foreign. So one of the main purposes of Montenegro is to reduce the seasonality of tourism. At the same time to develop tourism for hiking and biking projects and to gain more tourists for the overnight stay. The biggest budget comes from government, which occupied 75%, and other part of it comes from partners and collaborations. They also have different types of tourism taxes, for the government tourism tax: 20%/80% to municipality.

Along with increasing the connection with EasyJet and Montenegro airlines, the company tries to organize online promotion and wish to see more development in Northern part, because 95% of income from coastal areas, they wish to bring development of northern rural areas, not just as a tourism product but also an input with hotels etc.; and at the same time they want to connect agriculture and tourism (integrate local communities). Moreover, they want to attract small and medium tour operators and also to hold B2B events for selling Montenegro. They encourage local
communities for taking part in tourism, and tourists are asking for big investments on Golf tourism. As for investors, they promote in directly and indirectly ways to increase the investment. The slogan of Montenegro tourism is ‘wild beauty’, which means let the tourism to find an untouchable national part of Montenegro and at the same time to hide the negative part of the region.

Besides these development and positive effects from tourism, there are also many problems in Montenegro’s tourism. Montenegro owns National Parks, but they do not know how to promote it as a tourism product. Budget is something that influences decisions, so it is essential to be careful with it and with any decision. Montenegro faces the challenges in the high season with problems of quality for the service. If they want to develop tourism, they must to develop quality of tourism. Also, Airbnb is still not playing a big role here, because people are not aware of it.

Montenegro is a small country with different tourist products, one of the most important things is to focus on the quality of the product and be careful in investing in marketing diversity. The future idea about for promotion is to introduce the National Parks and beaches.

4.2.3 Tourism Board Podgorica

Our final meeting was with the tourism board director Tatjana Popovic Dmitrovic and the management team. The Tourism Board Podgorica activities are based on positioning the tourist products in local, regional and international markets and in tourist evaluation of comparative advantages of Podgorica and creating conditions for promotion of authentic and attractive tourism area, as well as profiling Podgorica as a MICE destination to develop MICE tourism within 2020 strategy.

Podgorica focuses on business tourism or transit tourism, so it does not have seasonality in tourism, and work together with the municipality for the promotion of the country. Paying attention on the young population active in sports and lots of people who like sports come in the capital. Moreover, tourism overnight in Podgorica in 2016 was 40% more than 2015, as Asian and European countries increase the number of markets.

Besides these development and positive effects from tourism, there are also many problems in Podgorica’s tourism, which related to mass tourism and seaside tourists who come just for transit and then they go to the seaside.

4.2.4 Conclusion

All in all, we learned that Montenegro has a systematic administrative system on tourism. In recent years, tourism has developed rapidly, which greatly promoted the development of the local economy after the civil war, especially on the luxury tourism. However, they are still facing some challenges and problems.

First, as a summer destination, Montenegro strongly bases its tourism products on sun and sea, accordingly it has strong and constant seasonality. In order to reduce the seasonality, several issues need to be addressed – tourist product diversification, price policy and flight connections.
Second, although Montenegro is focused on becoming an elite tourist destination; actually, the current situation is far away from desired image. For example, Bodva is already a destination of mass tourism according to the meeting with Aman Sveti Stefan.

Third, Montenegro has variety of the natural and cultural resources from coastal beach to Alpine mountain. However, in order to better use the resources and increase the variety of products, the tourism facilities needed to be constructed, like one of the most notable obstacles is the obsolete road network. Therefore, we think that inadequate infrastructure is the biggest problem of the further development of tourism in Montenegro.
5. Conclusion

By Ilaria Rosani

Overall, although the time spent in each of the three countries was limited, the class was able to understand some of the implications of working in tourism and development in Macedonia, Albania and Montenegro thanks to the immersive week marked by meetings of various themes. The diverse realities of the Balkans, from newly developing countries to already established markets, presented a whole new set of challenges that could very likely come across any of the student’s future careers in tourism.

Tackling the issue of uneven financial distribution is a rather common phenomenon in all business-influenced sectors, especially when no entity takes on the crucial role “to rule them all”. The example of Macedonia’s fragmented tourism industry clearly showed that their lack of a super parts institution (that should unite all the different local players under the same banner and with decisional power over their bigger, shared strategy) caused a natural shift in the government’s attention towards the promotional aspect of the “touristic renaissance” of the country. With no dedicated ministry to care for and foster investment in key areas such as facilities, salaries and development of service quality, the marketing and promotion were elected to make the country more visible to the international publics. In addition to this, political instability also hindered an effective and efficient management of the industry.

It was the local players, however, who showed great potential and determination to solve this issue from the bottom-up – from travel agencies in the capital to the “National Institution for Protection of Monuments of Culture and Museum in Ohrid”, their efforts to preserve and create a better coordination among all stakeholders participating in Macedonia’s tourism sector creates great expectations as to what the future holds for this proud and astonishing country.

A rather different picture was presented to us in Albania during our meeting with the National Tourism Agency in Tirana: although one might argue that their focus lies strongly on promotion and marketing as well, thanks to their aggressive presence in regional and central European markets, the country has been following different tourism strategies since 1993 and managed, consequently, to place itself rather well in terms of tourism’s direct economic contribution to their GDP. Not only this, but also their strenuous efforts to attract international investors and their eagerness to engage the EU in various collaborative works contributed to the great development of tourism infrastructure, in particular within their coastal regions.

Looming over them is, nonetheless, the menace of limited overnights and seasonality. Most tourism destinations dread and go to great lengths to avoid or confront this issue head-on, as fluctuations in tourist flows require resilience from both the place and players itself and from the strategy adopted. Instead of strengthening their existing offer, Albania chose to respond proactively with the use of a less mature market: the development of tourism during the winter season.

Rapid development in tourism was a recurring theme in the last country we visited: Montenegro. Similarly to Albania, because of its geographical position, the main tourism product that outshines all others is beach tourism. The aspiration for the country’s seaside is to develop and make it known as an elite destination for luxury tourism, as opposed to the less desired turn towards mass tourism.
Montenegro had previously taken. Enormous financial resources have been put into the realization of first-class marinas and resorts, provided by both luxury hotel groups and foreign investors. Seeing how the product is aimed at wealthier and fewer individuals, seasonality seems to be no pressing matter, as the clear distinction between high and low season suggests.

Management and marketing of tourism institutions of Montenegro appear to be well established: the policies adopted bind themselves well with the reality of the industry. Furthermore, one of the Ministry of Sustainable Development and Tourism’s goals is to make a clear-cut distinction between the image of yesterday’s Montenegro as an unsafe country (due to what happened in recent history) and the modern Montenegro. To achieve this, tourism is the best ambassador to change a country’s image. Situated in the capital city, Podgorica, both the NTO and LTO expressed their intention to boost MICE tourism in city areas, which changed the theme of the whole week drastically, as most of our meetings regarded tourism segments such as natural, adventure, and heritage tourism, etc.

In conclusion, we believe that all three countries – Macedonia, Albania, and Montenegro, however developed they may be – seem to be moving towards a promising and fascinating future in terms of tourism development and structure. We’ve noticed some similar trends and rather pressing matters in all three of them: connecting the countries to the world with flight connections and road systems; changing the image of unsafe countries to desirable and sought destinations; increase their international visibility; and seasonality. These issues, however, are already being addressed and we could already see the reach of their impact while present on their national soil.

As the majority of the class had never been to those parts of Europe before, the outcome of the Study Tour could not have been influenced any less in terms of expectations or bias. Stating that it was and still is food for thought for the students is no exaggeration.
Annex - Thank you letters

By Ilaria Rosani

1.1 Macedonia letter

Lugano, 4th of April 2017

Dear Mr Patcev,

our annual Study Tour is over and will be remembered for long time due to the educational value it had for the whole class. We thank you for making use of your knowledge and expertise and for taking time to give us insight in the reality of tourism in Macedonia. Our most sincere gratitude goes to you for delivering a presentation on your work in Ohrid, which was very well received by all of our class, director and director assistant. In particular, thanks to your clearness in putting forth the salient points with concrete examples, we really grasped to which extent your efforts to preserve Ohrid’s cultural heritage really reach.

Thank you once again for your time and for delivering the presentation.

Sincerely,

Ilaria Rosani
Class Representative Master International Tourism
ilaria.rosani@usi.ch
Lugano, 4th of April 2017

Dear Ali,

our annual Study Tour is over and will be remembered for long time due to the educational value it had for the whole class. We thank you for making use of your knowledge and expertise and for taking time to give us insight in the reality of tourism in Albania.

Our most sincere gratitude goes to you for delivering a presentation on your work as Albania’s NTO, which was very well received by all of our class, director and director assistant. In particular, Albania’s three tourism strategies a fascinating topic thanks to your clearness in putting forth the salient points.

Thank you once again for your time and for delivering the presentation.

Sincerely,

Ilaria Rosani  
Class Representative Master International Tourism  
ilaria.rosani@usi.ch
Lugano, 4th of April 2017

Dear Mrs Radjenovic,

our annual Study Tour is over and will be remembered for long time due to the educational value it had for the whole class. We thank you for making use of your knowledge and expertise and for taking time to give us insight in the reality of luxury tourism in Montenegro.

Our most sincere gratitude goes to you for delivering a presentation on Aman Sveti Stefan, which was very well received by all of our class, director and director assistant. In particular, the way you preserve the exclusivity and cultural riches of your hotel’s location greatly stimulated our interest thanks to your clearness in putting forth the salient points.

Thank you once again for your time and for delivering the presentation.

Sincerely,

Ilaria Rosani
Class Representative Master International Tourism
ilaria.rosani@usi.ch
References


