

ALTAX OBSERVATORY

Policy Brief · AO-PB-26-008 · Maj 2026

"PORTA E ALPEVE"
"GATEWAY TO THE ALPS"

dhe / and "PAKETA E MALEVE / MOUNTAIN PACKAGE"

POLICY BRIEF — Përmbledhje / Summary

Bazuar mbi / Based on: Policy Paper AO-POL-26-008 v2.0

SHQIP — Versioni Shqip

ENGLISH — English Version

Shkodër · Alpet Shqiptare · Bregdeti Verior | Shqipëria, Maj 2026
INSTAT · Banka e Shqipërisë · World Bank · UNWTO · WTTC · IPCC AR6 · Alpine Convention

VERSIONI SHQIP — POLICY BRIEF

TEZA QENDRORE

Shqipëria ka mundësinë strukturore të ndërtojë modelin e parë të ekonomisë alpine të integruar në Ballkan — me kusht që tensioni midis ROI privat, kuotave sociale dhe kufizimeve mjedisore të zgjidhet me mekanizma konkretë, jo me premtime.

01 ÇFARË ËSHTË PROBLEMI?

Shqipëria regjistroi 12.47 milionë vizitorë dhe 5.7 miliardë euro të ardhura në 2025 me rritje 95% ndaj 2019. Por suksesi sasior fsheh dy pabarazira strukturore:

- ▶ Hendeku i vlerës, me shpenzimi mesatar (460 €/turist) mbetet rreth gjysmën e Kroacisë (800 \$, 6 netë) dhe Malit të Zi (650 €, 6 netë).
- ▶ Disbalanca territoriale >70% e flukseve janë bregdetare dhe sezonale (90% maj–shtator), ndërkohë Alpet Shqiptare, me biodiversitet unik dhe potencial 12-mujormbeten dramatikisht të nënshfrytëzuara.
- ▶ Rreziku i kurthit, ku pa ndërhyrje sistemike, turizmi shqiptar rrezikon modelin grek me mbingarkesë bregdetare kronike + nënzhvillim malor + polarizim rajonal. EIB ka sinjalizuar tashmë se kapaciteti bregdetar ka arritur kufijtë (50 mln € kredi ujë/trajtim, janar 2025).

Vendi	Vizitorë (2024/25)	Shpenzim/turist	Netë qëndrimi	Turizëm % PBB
Shqipëria	12.47 mln	460 €	1.5 – 2.5 netë (malor/kulturor)*	26.4% Total/ 8–10% Direkt
Kroacia	26.38 mln	750 \$	5.1 - 6.0 netë	26.4%
Mali i Zi	2.61 mln	650 €	5.9 netë	30%
Gjeorgjia	7.4 mln	730 \$	5.5 netë	12% Total / 7.3% Direkt
Synimi AL 2032	—	850 € (+85%)	5+ netë (malor)	12-15% Direkt

Burimi: INSTAT, Croatian Bureau of Statistics, MONSTAT, PMC Research/Georgia NTA, WTTC 2024–2025.

02 ÇFARË PROPOZOHET?

Dy nisma komplementare, "Porta e Alpeve" (investim fillestar 100 mln €) dhe "Paketa e Maleve" (2025) propozohen si sistem i integruar, jo si projekte të izoluar:

- ▶ "Porta e Alpeve" e shndërron Shkodrën nga pikë tranziti pasive në gateway funksional që menaxhon flukset, integron bregdetin me malet dhe operacionalizon ekonominë e destinacionit verior.
- ▶ "Paketa e Maleve" është incentive "1 Euro" për investitorë privatë, por e rimëkëmbur me mekanizma performance strikte (auditim vjetor, klauzolë revokimi, kuotë punësimi 60% lokale).
- ▶ DMO (Destination Management Organization), si Shoqëri Anonime 51% private me autonomi financiare nga 30–50% e taksës së fjetjes, model TirolWerbung/New Zealand. Pa DMO, multiplikuesi ekonomik bie nën 1.5.
- ▶ "Human Capital Pipeline" me Qendra Trajnimi Alpine Shkodër (900 specialistë/vit) + programi "Ktheje Veriun" (500 familje diasporë). Po nuk u zbatuan këto, numri "6,000 vende pune" është ekonomikisht i mundshëm por demografikisht i pasigurt.

1:2.5 Multiplikues investimi (skenar bazë)	6,000+ Vende pune direkte (nëse HCP zbatuar)	+1.5% Kontribut PBB Qarku Shkodër/vit	2030 Pika e kthimit fiskal (break-even)
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03 TENSIONI QË RAPORTIT E ADRESON HAPUR

Dokumenti nuk parasupozon harmoni mes interesave — e pranon konfliktin:

ROI privat kërkon 15–25% rendiment + siguri pronësie	Kuotat sociale kërkojnë 60% punësim lokal (+20–30% kosto)	CC mjedisor kufizon numrin e vizitorëve në zonat alpine	Zgjidhja propozuar Compliance-for-incentives: ekskluzivitet + marka premium
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Mekanizmi zbatohet si vijon:

Investitori pranon kuotat → merr ekskluzivitet në zonë CC-mbrojtur (konkurrencë e kontrolluar) + integrim prioritar Booking.com/GetYourGuide + kredi preferenciale Albanian Alps Fund (2% nën treg). CCertifikimi ndërkombëtar ("Alpine Pearls" / "Green Destinations") i bën standardet një avantazh konkurrues, jo vetëm kosto.

04 GJETJET DHE EVIDENCAT KRYESORE

Modeli Fiskal

Bilanci neto bëhet pozitiv rreth 2030. Kumulativisht, projekti arrin vetë-qëndrueshmëri fiskale deri 2032. Vitet 2026–2029 kërkojnë mbulim buxhetor mesatar 3.1 mln €/vit, e menaxhueshme kundrejt fondeve IPA/EIB të disponueshme. Burimi kryesor i ardhurash, ku taksa fjetjeje (5 €/natë) + formalizim TVSh + Albanian Alps Fund.

Tregu i Punës — Verifikimi demografik

Fshatra malore janë të depopuluara: Theth 60–80 banorë dimërorë, Valbonë 30–40. Pa "Human Capital Pipeline" aktiv, oferta realiste deri 2032 është 3,500–4,500 direkte, jo 6,000. Programi "Ktheje Veriun" (500 familje diasporë + QTA 900 specialistë/vit) e bën 6,000 demografikisht të arritshme.

Stresi klimatik (IPCC AR6)

RCP4.5 –25% ditë bore mbi 1,500m deri 2050; ngjarje ekstreme +30% më shpesh. RCP8.5 –50% ditë bore; >30 ditë/vit mbi 35°C në Shkodër. Paradoksi është se bregdeti bëhet më i nxehtë → malet bëhen gjithnjë e më tërheqëse verërorisht ("climate dividend"). Por kërkon +8–10% investim shtesë për reziliencë infrastrukturore.

Mësimet nga Homologët

- Tirol (AU) - 17.5% PBB rajonal; DMO e plotë = çelësi; multiplikues 1:3.5.
- Julian Alps (SI) - Green Scheme 34 DMO + certifikim 4-nivel = model evropian.
- Rhodope (BG) - investime pa DMO = degradim cilësie → rreth vicioz. Mësim direkt.
- Mali i Zi me sfida identike me AL dhe ende të pazgjidhura edhe pas 5 vitesh avantazh kohor.

05 REKOMANDIME KRYESORE

#	Masa	Afati	Aktori
1	Ligji ZZTM + status DMO 51% private (Kuvendi)	Shtator 2026	Kuvendi
2	30–50% taksë fjetjeje → DMO (Këshilli Ministrave)	Janar 2027	KM + MF
3	Booking.com + GetYourGuide: oferta malore online	Q3 2026	Min. Turizëm
4	Albanian Alps Investment Fund: seed 5 mln € publike	Dhjetor 2026	Min. Financave
5	Qendra Trajnimi Alpine Shkodër (QTA): hapja	Nëntor 2026	Min. Arsimit
6	"Kthoje Veriun": thirrja e parë diasporë	Mars 2027	Min. Diasporës
7	Studim CC (UNWTO): efekt juridik detyrues	Q4 2026	Bashkia Shkodër
8	Kliring kadastral 10 zonat prioritare (moratorium)	Q2 2027	Kadastri + Bashkitë

THIRRJE PËR VEPRIM

Dritarja strategjike është 2026–2028, para se konkurrentët rajonalë (Mali i Zi, Greqia Veriore) ta mbyllin hendekun.

Tre kushte sine qua non: (i) tensioni investitor-rregullator zgjidhet me compliance-for-incentives, jo retorikë; (ii) Human Capital Pipeline ndërtohet paralel me infrastrukturën; (iii) Kapaciteti mbajtës bëhet ligj, jo dekret.

ALTAX Observatory ofron mbështetje teknike pro bono: altax@altax.al

ENGLISH VERSION — POLICY BRIEF

CENTRAL THESIS

Albania has the structural opportunity to build the first integrated alpine economy model in the Balkans — provided that the tension between private ROI, social quotas and environmental limits is resolved through concrete mechanisms, not promises.

01 WHAT IS THE PROBLEM?

Albania recorded 12.47 million visitors and €5.7 billion in revenue in 2025 — a 95% increase over 2019. Yet this quantitative success conceals two structural imbalances:

- ▶ Value gap: average spending (€460/tourist) remains roughly half that of Croatia (\$800, 6 nights) and Montenegro (€650, 6 nights).
- ▶ Territorial imbalance: >70% of flows are coastal and seasonal (90% May–September), while the Albanian Alps — with unique biodiversity and 12-month potential — remain dramatically underutilised.
- ▶ Trap risk: without systemic intervention, Albania risks the Greek model — chronic coastal overload + mountain underdevelopment + regional polarisation. The EIB has already signalled that coastal capacity has reached its limits (€50M water/wastewater loan, January 2025).

Country	Visitors (2024/25)	Spend/tourist	Nights stayed	Tourism % GDP
Albania	12.47 mln	€460	< 2 nights (mtn)	26.4% Total/ 8–10% Direct
Croatia	26.38 mln	\$750	6.0 nights	26.4%
Montenegro	2.61 mln	€650	5.9 nights	25%
Georgia	7.4 mln	\$730	4.2 nights	12% Total / 7.3% Direct
AL Target 2032	—	€850 (+85%)	5+ nights (mtn)	12-15% Direct

Sources: INSTAT, Croatian Bureau of Statistics, MONSTAT, PMC Research/Georgia NTA, WTTC 2024–2025.

02 WHAT IS PROPOSED?

Two complementary initiatives — "Gateway to the Alps" (€100M initial investment) and the "Mountain Package" (2025) — are proposed as an integrated system, not isolated projects:

- ▶ "Gateway to the Alps" transforms Shkodër from a passive transit point into a functional gateway that manages tourist flows, integrates the coast with the mountains, and operationalises the northern destination economy.
- ▶ "Mountain Package", "1 Euro" incentive for private investors — but overhauled with strict performance mechanisms (annual independent audit, revocation clause, 60% local employment quota).
- ▶ DMO (Destination Management Organization) - 51% privately owned joint-stock company — financial autonomy from 30–50% of the accommodation tax, modelled on TirolWerbung/New Zealand Tourism Board. Without a DMO, the economic multiplier falls below 1.5.
- ▶ "Human Capital Pipeline" - Shkodër Alpine Training Centre (900 specialists/year) + "Return to the North" programme (500 diaspora families). Without this, "6,000 jobs" is economically plausible but demographically uncertain.

1:2.5 Investment multiplier (base scenario)	6,000+ Direct jobs (if HCP implemented)	+1.5% GDP contribution, Shkodër region/yr	2030 Fiscal break-even point
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03 THE TENSION THIS PAPER ADDRESSES OPENLY

The paper does not assume harmony between interests — it acknowledges the conflict:

Private ROI requires 15–25% return + property security	Social quotas require 60% local employment (+20–30% cost)	Environmental CC limits visitor numbers in alpine zones	Proposed solution Compliance-for-incentives: exclusivity + premium brand
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The mechanism:

Investors accept the quotas → receive exclusivity in a CC-protected zone (controlled competition) + priority integration with Booking.com/GetYourGuide + preferential loans from the Albanian Alps Fund (2% below market). International certification ("Alpine Pearls" / "Green Destinations") turns standards into a competitive advantage, not just a cost.

04 KEY FINDINGS AND EVIDENCE

Fiscal Model

Net fiscal balance turns positive around 2030. Cumulatively, the project reaches fiscal self-sufficiency by 2032. Years 2026–2029 require average public coverage of €3.1M/year — manageable against available IPA/EIB funding. Primary revenue: accommodation tax (€5/night) + VAT uplift from formalisation + Albanian Alps Fund.

Labour Market — Demographic Verification

Mountain villages are depopulated: Theth 60–80 permanent winter residents, Valbona 30–40. Without an active Human Capital Pipeline, the realistic supply by 2032 is 3,500–4,500 direct jobs, not 6,000. The "Return to the North" programme (500 diaspora families + ATC 900 specialists/year) makes 6,000 demographically achievable.

Climate Stress (IPCC AR6)

RCP4.5: –25% snow days above 1,500m by 2050; extreme events +30% more frequent. RCP8.5: –50% snow days; >30 days/year above 35°C in Shkodër. Paradox: as the coast heats up, the mountains become increasingly attractive in summer ("climate dividend"). But this requires +8–10% additional investment for infrastructure resilience.

Lessons from Peers

- Tyrol (AT): 17.5% of regional GDP; full DMO = the key; multiplier 1:3.5.
- Julian Alps (SI): Green Scheme with 34 DMOs + 4-level certification = European benchmark.
- Rhodope (BG): investment without DMO = quality degradation → vicious cycle. Direct lesson.
- Montenegro: identical challenges to Albania; unresolved despite a 5-year head start.

05 KEY RECOMMENDATIONS

#	Measure	Deadline	Actor
1	MTZD Law + DMO legal status (51% private) — Parliament	September 2026	Parliament
2	30–50% accommodation tax → DMO (Council of Ministers)	January 2027	CoM + MoF
3	Booking.com + GetYourGuide: mountain offer bookable globally	Q3 2026	Ministry of Tourism
4	Albanian Alps Investment Fund: €5M public seed capital	December 2026	Ministry of Finance
5	Shkodër Alpine Training Centre (ATC): opening	November 2026	Ministry of Education
6	"Return to the North": first diaspora call	March 2027	Ministry of Diaspora
7	Scientific CC study (UNWTO): legally binding effect	Q4 2026	Municipality of Shkodër
8	Cadastral clearing — 10 priority zones (moratorium)	Q2 2027	Cadastre + Municipalities

CALL TO ACTION

The strategic window is 2026–2028, before regional competitors (Montenegro, Northern Greece) close the gap. Three sine qua non conditions: (i) the investor-regulator tension is resolved through compliance-for-incentives, not rhetoric; (ii) the Human Capital Pipeline is built in parallel with infrastructure; (iii) Carrying Capacity becomes law, not ministerial decree.

ALTAX Observatory offers pro bono technical support: altax@altax.al

PASQYRA VIZUALE · VISUAL DASHBOARD

Skenarët / Scenarios

Skenari / Scenario	Vizitorë +%	Shpenzim/turist	Vende pune direkte	Break-even
Bazë / Base (DMO part.)	+ 35% (2028)	620 €	2,500 (2028)	2030
Optimist / Best case (DMO e plotë)	+ 80% (2032)	850 €	6,000+ (2032)	2029
Pesimist / Worst case (pa DMO)	Rritje e pakontrolluar/ Uncontrolled growth	Degradim / Degradation	< 1,500 formale/ < 1,500 formal	Nuk arrihet/ Not achieved

Aktorët Kyç / Key Stakeholders

Grupi / Group	Pozicioni / Position	Strategjia / Strategy
Qeveria Qendrore / Central Gov.	Mbështetës / Supporter	Pronar politike / Political owner
Investitorët privatë / Private investors	Neutral → Mbështetës	Compliance-for-incentives package
Komunitet lokal / Local communities	Neutral → Mbështetës	Community Fund 5% + kuota punësimi
Operatorë informal / Informal operators	Kundërshtues / Challenger	Amnisti 18-mujore + formalizim gradual
NGO-t mjedisore / Environmental NGOs	Kundërshtues → Pro nëse CC ligjor	CC si ligj (jo dekret)
Diaspora shqiptare / Diaspora	Neutral (potencial i lartë)	Albanian Alps Fund + "Kthoje Veriun"

Rreziqet e Mbëtura / Residual Risks

Kapital njerëzor / Human Capital Pasiguri demografike pa HCP Demographic gap without HCP	Pronësia / Property rights Konflikte kadastrale në male Cadastral conflicts in mountains	Politizimi i DMO-së / DMO capture Rrezik kolonizimi politik Political capture risk	Klima / Climate RCP8.5: -50% ditë bore RCP8.5: -50% snow days
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