

Analysis on the tourist offer of the Vlora Region, from the viewpoint of tourism stakeholders¹

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Abstract

The tourism industry is one of the vital sectors of the Albanian economy, an important contributor to the country's GDP, investments and employment. During the last 10 years, through the investments, marketing and services provided, this sector has tried to offer tourism products which have significantly increased the number of visitors, both Albanians and foreigners, but still reflects many issues hindering its competitiveness in the region and the increase in profits. Given the problems that accompany this sector in relation to seasonality and the small number of days of stay of tourists, as well as

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concerning the objectives of the National Strategy for Sustainable Tourism Development 2019–2023⁶, this paper aims to analyse the tourist offer of the Vlora Region from the point of view of tourism stakeholders. The qualitative method is used to analyse the tourist offer of the Vlora Region, based on a questionnaire in the form of a semi-structured interview with private operators, public operators, donors and NGOs related to the sector, and training and educational institutions. The findings of the paper highlight not only the weaknesses and strengths of the offer, but also the opportunities and threats that need to be considered. In particular, they emphasize the need for cooperation and accountability in line with roles played in the sector.

Keywords: *tourism, tourist offer, stakeholder, Region of Vlora*

1. Introduction

The tourism industry occupies a key place in the Albanian economy and is an important resource for the development of the country. Tourism can make an important contribution to three dimensions of sustainable development: create jobs, generate trade opportunities in order to identify the needs and support tourism activities, and create important capacities which promote the benefits of environmental conservation and cultural diversity.

According to the Travel and Tourism Economic Impact Report 2018: Albania of the World Travel and Tourism Council (WTTC)⁷, during 2017 the tourism sector recorded a direct contribution of US\$ 1.12 billion, accounting for about 8.5% of the country's Gross Domestic Product (GDP). Together with the multiplied indirect effects, the total contribution was almost three times higher, at about US\$ 3.47 billion, accounting for about 26.2% of the GDP, therefore positioning this sector as one of the most important in the development of the national economy.

In 2017, employment in the tourism sector accounted for about 7.7% of the total labour force in Albania, while, according to the same report of the WTTC, investments in this sector accounted for about 7.5 % of all investments in the country.

The accommodation and food services sector includes restaurants and other food facilities, as well as hotels, guesthouses, hostels, etc. This sector in 2020, according to the data from the Institute of Statistics, numbered about 17 773 units,

⁶ For a more comprehensive understanding of the National Strategy for Sustainable Tourism Development 2019–2023, refer to <https://turizmi.gov.al/wp-content/uploads/2019/06/Strategjia-Komb%C3%ABtare-e-Turizmit-2019-2023.pdf>.

⁷ For more on the *Travel and Tourism Economic Impact Report 2018* of the World Travel and Tourism Council (WTTC), refer to <https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2018/albania2018.pdf>.

representing about 17.5% of the entire service sector and 10.5% of all economic activities in Albania.⁸ Accommodation and tourism services have been gradually improving their standards.

Compared to other countries in the region and in the Western Balkans, the development of tourism in Albania is still far from reaching the potential represented by the natural, historical and cultural resources of the country. Infrastructure, accommodation capacities, quality of services, tourist offer and tourism products are all factors which affect the sustainable development of tourism in Albania, even endangering its sustainability in the long run.

One of the biggest problems of the tourism sector, especially for operators running their activities along the coast, is its seasonality and the small number of days the tourists stay. This research is part of the project “Design of tourist offer based on the perspective of sustainable development (Case study: Durrës and Vlora Region)” supported by the Agency for Scientific Research and Innovation, and is in line with the objectives of the National Strategy for Sustainable Tourism Development 2019-2023 (Ministry of Tourism and Environment, 2018). The paper is based on primary and secondary research, where a special place is occupied by the consideration of laws related to the sector, such as law no. 7764, dated 2.11.1993, “On foreign investments”, law no. 93/2015 “On tourism”¹⁰, law no. 27/2018 “On cultural heritage and museums”¹¹, etc.

The goal of this research is to analyse the tourist offer of the Vlora Region from the point of view of tourism stakeholders. The research question is: Is there a tourist offer for the Vlora Region? The auxiliary question is: What are the reasons for tourists/vacationers staying only for a small number of days?

In this research, the qualitative methodology is used. It is based on a questionnaire in the form of a semi-structured interview, which retains the same bulk of questions for all subjects but has one or two different ones depending on the operator interviewed: private, public, donor or non-profit organization (NGO), and education-training institution in the sector. A total of 31 interviews were conducted.

The findings of the paper, in addition to highlighting the problems of the sector, emphasize the importance of cooperation among operators, taking over of their responsibilities by the local government in formulating the tourist offer and inventory of key tourist resources of the local government unit, improving service quality and focusing on human resources.

⁸ For more elaborate data on this area, refer to <http://www.instat.gov.al/al/temat/industria-tregtia-dhe-sh%C3%ABrbimet/regjistri-statistikor-i-nd%C3%ABrmarjeve/#tab2>.

⁹ For a more comprehensive reading of this law, refer to <https://www.parlament.al/Files/ProjektLigje/20181026093814per%20investimet%20e%20huaja%20i%20perditesuar.pdf>.

¹⁰ For a more comprehensive reading of this law, refer to https://turizmi.gov.al/wp-content/uploads/2018/02/Ligji_93-2015.pdf.

¹¹ For a more comprehensive reading of this law, refer to https://kultura.gov.al/wp-content/uploads/2018/07/Ligji.nr27-_dt.17-05-2018.pdf.

2. Literature review

The United Nations World Tourism Organization (UNWTO) defines tourism as “the activities of individuals while travelling and staying in a country outside their usual place of residence, over a period of less than one year, for leisure, business or other purposes.”¹²

Since 2005, the UNWTO has launched a project to create a common glossary of terms for tourism and, on this basis, the following definition was formulated: “Tourism is a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes. These people are called visitors (which may be either tourists or excursionists; residents or non-residents) and tourism has to do with their activities, some of which involve tourism expenditure” (Wescot & Anderson, 2021).

Individuals become tourists when they voluntarily leave their normal environment where they reside to visit another environment. These individuals will typically engage in a variety of activities, regardless of how close or distant this environment (destination) is (Hall, 2008; Holloway & Taylor, 2006; Jafari, 2002).

In 1963, at the United Nations Conference on International Travel and Tourism, it was agreed to use the term “visitor” to describe individuals visiting another country. This definition included two groups of visitors and tourists were classified as temporary visitors staying at least 24 hours in a destination. As long as they are travelling for recreation, health, sports, vacation, study or religious purposes, their visit could be categorized as leisure. Excursionists can also be considered temporary visitors even if they stay at a destination for less than 24 hours. However, these definitions do not take into account the domestic tourists.

However, broadly put, tourism involves the movement of people for all purposes, including daily visits or excursions (Cooper et al, 2008; Holloway & Taylor, 2006).

The main function of the tourism industry is to serve travellers. Its success depends on the positive interaction of all sectors involved. Sustainability is crucial for the development of economic activities, particularly for those that are largely dependent on the natural environment, such as tourism (Saarinen, 2014). Essentially, tourism involves four main sectors: (i) transport, (ii) accommodation, (iii) ancillary services, and (iv) sales and distribution (Genc, 2020).

Tourism represents also a market for tourism services and the economy of any market, including that of tourism, is determined by supply and demand. In general, the tourist offer is presented as a tourism object. This means that the tourist offer includes everything that can be used to satisfy the tourist demand: climate, landscape, hotels, restaurants, entertainment facilities, etc. Therefore, the tourist

¹² Cited in Greg Richards, *Cultural Tourism in Europe* (Wallingford: CAB international, 1996), p. 22.

offer covers many different elements and the optimization of its management is also needed.

The tourist offer is a combination of services and products that are presented for consideration by a client who wants to make a tourist trip.¹³ The object of the tourist offer is the consumer or the tourist. Therefore, when planning and developing a service package, it is necessary to identify the real needs of the client and target the offer for those needs. The content of the tourist offer also depends on the entities that produce and receive it. The tourist offer cannot be considered before it is consumed and to do so one has to move to different places.

The components of the tourist offer are as follows (Camilleri, 2018): attractions (Iaromenko, July 2021): they are the places the tourists perceive as the satisfaction of their leisure-oriented needs; transportation: they are the modes of commuting; intermediaries: they are the mediators; destination: it is the place the tourists visit; activities: they include activities the tourists are interested to engage in.

3. Methodology

Regarding its geographical features, the Vlorë Region offers an abundance of the extraordinary natural wealth of Albania. The south coast, or the Albanian Riviera, has become in recent years a tourist attraction of Albania, frequented by Albanian and foreign visitors.

Based on the Travel and Vacation: Tourism Survey 2019 (Institute of Statistics, 2021), the most preferred destinations for personal or business travel in 2019 in Albania are the regions of Tirana (28.5%), Korça (12.3%), Vlorë (11.6%) and Durrës (10.3%). During 2020, meanwhile, the most preferred regions are Tirana (29%), Vlorë (17.7%), Durrës (15.4%) and Korça (9.8%) (Institute of Statistics, 2022). Based on the Travel and Vacation: Tourism Survey 2019 (Institute of Statistics, 2021), short trips to Albania occupy about 68.8% of all trips and the average duration of stay is 1 to 3 nights, while longer duration of stays, those of over 4 nights, are outside Albania for 71.1% of the cases. Based on the Tourism in Figures 2020 (Institute of Statistics, 2022), Albania during 2020 was liked more by the Kosovo Albanians, the 62% of all visitors came during the third quarter of the year and a foreign visitor has stayed in accommodation facilities for an average of 2.4 days.

These data are only a small part of the overall data processed by the Institute of Statistics from 2014 onwards (Institute of Statistics, n.d.) on quarterly basis and, since 2018, are further enriched by including other indicators, such as the duration

¹³ For a more elaborate reading on the matter, refer to *Qué es la oferta turística?* Centro Europeo de Postgrado Magazine. Retrieved from <https://www.ceupe.com/blog/que-es-la-oferta-turistica.html>.

of stay. The review of statistics on tourism testifies to the importance of the sector in the Vlora Region, but also clearly shows the seasonality of the sector and the short duration of stay of the tourists.

The National Strategy for Sustainable Tourism Development 2019-2023 (Ministry of Tourism and Environment, 2018) has the following objectives: (i) improvement of tourism services, (ii) development of tourism products, (iii) reorientation of promotion towards potentials, (iv) support for destination management. In regards to the Vlora Region, the tourism sector reflects seasonality, since it works mainly in the periods of the summer season on the coast during the third quarter of the year, as well as the short duration of stay of visitors (Institute of Statistics, 2022).

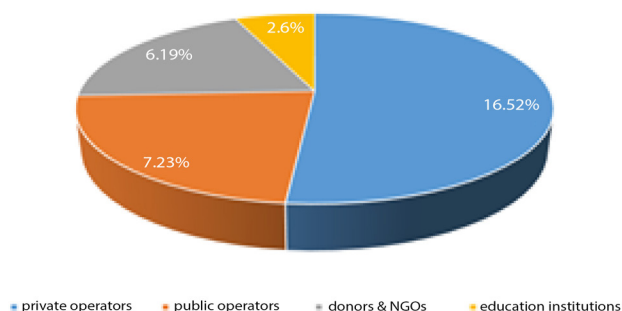
The goal of this research is to analyse the tourist offer of the Vlora Region from the point of view of tourism stakeholders.

According to the law no. 93/2015 “On tourism”,¹⁴ the tourist offer for each region is to be compiled by the Regional Council, while their promotion is the task of the National Tourism Agency and the Ministry of Tourism and Environment.

The research question is: Is there a tourist offer for the Vlora Region? The auxiliary question is: What are the reasons for tourists/vacationers staying only for a small number of days?

The methodology employed in this research is the qualitative methodology and the instrument used is a questionnaire in the form of a semi-structured interview, which retains the same bulk of questions for all subjects but has one or two different ones depending on the operator interviewed: private, public, donor or NGOs, and education-training institution in the sector. The distribution was based on a contact database provided by the authors of this paper. The sample consists of 31 entities (in Vlora and Saranda): (i) private operators, (ii) public operators, (iii) donors and associations, (iv) educational and training institutions.

FIG. 1 Composition of the sample of respondents



¹⁴ For a more comprehensive reading of this law, refer to https://turizmi.gov.al/wp-content/uploads/2018/02/Ligj_93-2015.pdf.

The semi-structured interview which was conducted with stakeholders of the tourism sector contains the following questions: What is your opinion about the tourist offer of the Vlora Region?, What is your opinion about the reasons making tourists to stay on limited days?, Is there a difference between the Albanian and foreign tourists?, Do you keep regular statistics of visitors (tourists)?, If so, what percentage of them return?, How many of them are foreigners and how many are Albanians?, Are there any tourism information centres in your region or in all the regions of the country?, Do you think that you have sufficient human capacities to cover the tourist offer?, In your opinion, are there any local and central policies supporting the enrichment of the tourist offer and the creation of tourist destinations?, What are the most acute problems of tour operators that affect the tourist offer?, Do you have any cooperation with other stakeholders in the tourism industry?, If so, how does this cooperation affect the tourist offer?, How do you assess your cooperation with the education sector?

4. Findings of the paper

The information collected through interviews was processed based on the definition of the tourist offer, the components it is made up of and based on the law no. 93/2015 “On tourism”.¹⁵

Evaluation of the tourist offer of the Vlora Region

We made the assessment for the tourist offer of the Vlora Region based on the SWOT analysis¹⁶. Thus, the weak and strong points of the tourist offer of the Vlora Region were identified, as well as the threats and opportunities related to the external environment (Table 1).

¹⁵ For a more comprehensive reading of this law, refer to https://turizmi.gov.al/wp-content/uploads/2018/02/Ligj_93-2015.pdf.

¹⁶ The main reason for choosing the SWOT analysis is related to the purpose of the project, part of which is this paper. At the end of the project we will have to propose the tourist offer and prepare the tourist guide.

TAB. 1 Evaluation of the tourist offer of the Vlora Region

Weak points	Strong points
<ul style="list-style-type: none"> • current tourist offer is limited, focusing only on the natural resource offered by the sea • short tourist season • lacks a tourist product that offers exploration of mountains, sea, culture, archaeology, gastronomy, etc., and which extends throughout the year • lack of promotion of local products (gastronomy and zero kilometre products) • low quality of service: quality-price relation • tourist accommodation structures with small to medium capacities • the construction standard is unclear even after the categorization of these structures was made public, from the point of view of both construction and services • mismanagement (or lack of management) of tourist flows, also as a result of the "over crowd" effect at the peak moments of the season (mostly in Saranda, Ksamil and Dhermi) 	<ul style="list-style-type: none"> • foreign tourists positively appreciate the friendly behaviour of people, natural beauties, tradition, food and price level in general • increase of accommodation capacities in the main urban areas (Vlora, Himara, Saranda, Ksamil, Dhermi, etc.) • improved standards related to sea & sun tourism services (beaches, Ho-ReCa services, extra activities during the summer period)
Threats	Opportunities
<ul style="list-style-type: none"> • low level of law enforcement • tourism of the other region countries (Greece, Croatia, Montenegro) • infrastructure problems, mostly related to urban planning, road traffic, parking (mainly in Saranda and Ksamil) • environmental management and especially urban waste management 	<ul style="list-style-type: none"> • the brand or fame of the Albanian Riviera • designing the tourist offer in cooperation with the Regional Council • compilation of an inventory of the main tourist resources of the local government unit by the Regional Council • coordination of local government work with the tourism sector related to cleaning, allocation of private beaches, improvement and development of infrastructure • coordinated efforts of central government, local government and tourism operators in relation to information and advertising campaigns • various projects for the establishment of organizations for destination management

Reasons for the short stay of Albanian and foreign tourists

Respondents state that the reasons for tourists staying only a few days in the Vlora Region are: economic level of Albanian families, little diversity among travel providers, lack of coordination of stakeholders, lack of the chain of experience for

the tourists which leads to increased days of stay, lack of additional tourist activities, lack of guides or information for tourist areas, inconsistency of the service provided by the business in relation to the standard required by foreign tourists, Albanian visitors find inconsistencies between the offer and the price levels, short seasonality brings a lot of pressure on services and public infrastructure, as well high level of pollution of the environment, sea, beaches, roads.

The Vlora Region, in the opinion of the interviewees, should extend the tourist season and not be based only on the sun & sea tourism. The short distance of this region with Tirana and the other Albanian-speaking countries should lead operators towards tourist packages in order to have year-round tourism, which includes culinary tours, wine and olive oil tours, various festivities related to culture, tradition, religion, etc.

Day tourists (who do not consume a night of sleep) are a phenomenon almost exclusively in Saranda and constitute an opportunity for promotion (in 2019, over 200 000 daily cruise tourists arrived from Corfu, from over 110 nationalities).

Statistics for the sector in the Vlora Region

The local government units process a number of statistics that are based mainly on the data kept at the border crossing points of tourists and, as required by law, also based on the register of guests that must be maintained by each hotel, guesthouse, etc. It is, of course, difficult to present and possess accurate statistics due to informality and non-declaration of residence activity on one hand, but on the other hand also because of not declaring the exact purpose of entering in Albania at the border crossing points.

Tourist information offices in the region

Tourist information continues to be a partially resolved issue, although the possibilities of accessing information are numerous. Foreign tourists coming through agencies have their programmes designed, while other tourists are mainly led by the local citizens. The difficulty is often exacerbated by the lack of the local and national road signs.

Vlora Region has two visitor centres: Llogara, Rradhime and Saranda has one: Syri i Kalter. But, it should be noted that they are visitor centres and not exactly information offices. In order to build a complete service network of tourist information offices, they must be positioned in favourable places to be accessible by tourists, have their services and information continuously updated, have a distinct voice in the local budget for promotion at entry points at land, sea and airports, as well as information must also be in English, the employees should be able to

communicated in English, and to set up spots to enable navigation and orientation based on the tourist offer.

Human capacities covering the tourist offer

Human resources are one of the biggest problems of the tourism sector in the country and this is acknowledged by all four stakeholders. The supply of workforce in the tourism sector remains significantly lower than the business demands for these resources, while the continuous education and training of employees in the tourism industry is not sufficient. There is a lack of vocational courses and training and, moreover, the connection of business operators with education is still weak.

The serious problem in human resources comes mainly due to the seasonality of tourism in the region (and in the whole sector), which on the one hand makes it very difficult to find staff, and on the other hand the quality of human resources in this sector is debatable. While large accommodation structures are hiring international staff in some of their units, for small and medium businesses this is impossible. The sector is clearly lacking in management staff, as well as experts in the field. Regarding human resources, it is an undisputed fact that those employees who have the training needed in the sector migrate in the summer season to neighbouring countries where the chances of greater earnings are bigger.

Local and central policies in support of enriching the tourist offer and creation of tourist destinations

From a legal point of view, the operators state that the laws that support the creation and enrichment of the tourist offer and the creation of tourist destinations exist, but their implementation leaves much to be desired, perhaps due to lack of vision, mismanagement or non-involvement of all stakeholders in the sector. bureaucracy and clientelism.

Municipalities are often apathetic, moving only if they receive orders from central institutions, while the interaction between municipalities and business operators is weak from a supportive and developmental point of view. Businesses in the sector are seen more as entities to collect taxes from or fines mainly during the summer season than as important contributors to the local and national economy. The Regional Council, which has the task of creating the regional tourist offer, seems to reflect, in addition to the lack of structures and expertise, also a lack of responsibility in fulfilling an obligation arising from the law.

It is worth noting that operators in the sector, as well as donors and associations, note that the National Tourism Agency, the Ministry of Tourism and Environment, ministers and institutions promote destinations without any

information or preparation on the conditions on the ground and, moreover, in international tourism fairs political clientelism promotes sellers (operators) and not tourism products or destinations.

Operators emphasize that local and central policies should focus more on the development and improvement of infrastructure in tourist areas, local government should be more involved in marketing and cultural-artistic activities to support the sector during the season, destination management organizations should be established, a change of mentality is required in the cooperation among the operators and between them and the local government, private strategic investments should be encouraged and well-known international brands in hotel and tourism should be attracted, new methodologies for evaluation, standardization, certification and classification of services should be developed. In the function of tourism and tour operators, tourism products should be consolidated and developed, as well as the reorientation of promotion towards tourism potentials.

Problems of tour operators that affect the tourist offer

The tourist offer of the Vlora Region is influenced by a number of factors that depend on private operators in the sector to be more attractive. Respondents state the culture and quality of service, the difficulty in finding staff, the lack of qualified human resources either at the management level or in operational roles, the lack of cooperation of operators with each other, exaggerated prices and the quality-price ratio, entrepreneurial mentality, discrepancy between what is advertised and what is offered, lack of links to the financing channels of national support schemes (Agency for Agricultural and Rural Development or EU Instrument for Pre-accession Assistance for Rural Development) or other channels (mainly for businesses in rural areas), investment quality, limited accommodation capacity and poor service and management infrastructure.

The tourist offer of the Vlora Region is influenced by a number of environmental factors in which this offer is created and operates, such as: land ownership, informality, chaotic urban development, lack of sustainable tourism development strategies at the local or regional level, lack of branding of destinations, lack of private-public cooperation also due to clientelism, corruption, transparency in information, but also lack of vision or professional tourism staff near the municipalities of the region, lack of intercity infrastructure, lack of infrastructure (ports, piers, docking stations, maintenance sites), environmental pollution and waste management, lack of maintenance of public spaces, lack of measures taken before the tourist season by the municipality, persistent problems with energy and lack of water 24 hours per day, delays in issuing permits for private beaches, the creation of "monopolies" in terms of travel agencies based in Tirana, lack of direct lines from different places to Vlora or Saranda.

5. Conclusions and recommendations

The purpose set out in this paper, which was to analyze the tourist offer of the Vlora Region from the perspective of tourism stakeholders, was made possible through the use of a qualitative methodology, based on a questionnaire in the form of a semi-structured interview, on a variety of literature sources and concepts related to tourism offer, tourism product and destination in tourism. A total of 31 persons were interviewed, of which 16 are private operators, seven are public operators, six are donors and associations, as well as two educational institutions in tourism.

The tourism sector in the Vlora Region, but also in all of Albania, is new in terms of experience. Its chaotic development reflects the evolving entrepreneurial mentality, the lack of vision of governments to design and implement strategies aimed at creating a sustainable sector, and the apathy of local institutions.

The local government, more specifically the Regional Council, which by law must prepare the inventory of the main tourist resources of the local government unit and formulate the tourist offer of the Vlora Region, does not have the necessary vision and expertise to do so. The municipalities of the cities continue to show incompetence in the management of public works in function of the tourist season and in the management of problems related to environmental pollution, waste management, lack of maintenance of public spaces, 24 hour water supply, green spaces.

Overlapping activities between the central and local government bodies, little focus on the tourist offer and the cooperation between the operators and the promotion of the tourist product. Lack of a proper calendar of artistic and cultural activities, lack of tourist information offices.

A mindset that raises barriers instead of communication channels and cooperation between stakeholders, and that is evident by the lack of coordination of local government work with business operators, the lack of support for the sector and the lack of recognition of opportunities created today by donors and various organizations.

Mentality and short-term approach of business operators in relation to quality, quality-price ratio and the establishment and implementation of quality standards. Difficulties of business operators in finding and retaining qualified human resources, lack of motivation of individuals to work in the sector due to seasonality, lack of a law that protects seasonal employees and better employment opportunities in neighbouring countries.

Recommendations

Proper implementation of the law no. 7764, dated 2.11.1993, “On foreign investments”, law no. 93/2015 “On tourism” and law no. 27/2018 “On cultural heritage and museums” makes it possible for the central and local government bodies to play their role in formulating, supporting and promoting the tourist offer of each region.

The Regional Council should record and create the inventory of the main tourist resources of the local government unit and formulate the tourist offer of the Vlora Region. The National Tourism Agency and the Ministry of Tourism and Environment should take the responsibility of promoting the offer in cooperation with the operators. Municipalities should conceive and budget differently the tourist information offices and increase the budget support to this sector in the Vlora Region.

Stakeholders need to change their mindset in relation to the culture of collaboration between them, as well as take on their responsibilities in collaboration. It remains important to coordinate local government work with business operators regarding cleaning, awarding of private beaches, improving and developing the infrastructure.

Encouraging private strategic investments, attracting well-known international brands in hotel and tourism, branding of destinations, standardization of accommodation structures remain an area where we still need to work and cooperate between stakeholders.

The quality of service should be conceived and realized in accordance with international standards and should make tourism enterprises competitive with the region. Increasing the number of days the tourists stay should come through drafting of consistent policies and strategies at the macro level of several years that would uniformly impact the sector and service providers, marketing Albania in relation to tourism capacities to enable recognition and competition with countries of the region, study of consumer behaviour patterns for domestic tourists, Albanian-speaking and foreign countries, as well as emotional tourism which in the case of Albania means tourists from Kosovo and emigrant tourists, who continue to contribute to the economy of the sector.

The government should play its regulatory role in enforcing the law and protecting employees by setting by law the minimum seasonal working time. In relation to private operators and the sector of education and continuous training of employees, more needs to be done in order to increase capacities in management, marketing, tour operating, tour guides, HoReCa, health & safety, cleaning, etc.

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