



Austria - Montenegro
Co-operation Project

**Touristic and Ecological Development in
the Bjelasica & Komovi-Region**
***Turističkog i Ekološkog Razvoja Regiona
Bjelasice i Komova***

***Regional Tourism
Strategy***

Kolašin, May 2005



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 Austrian Cooperation
Eastern Europe



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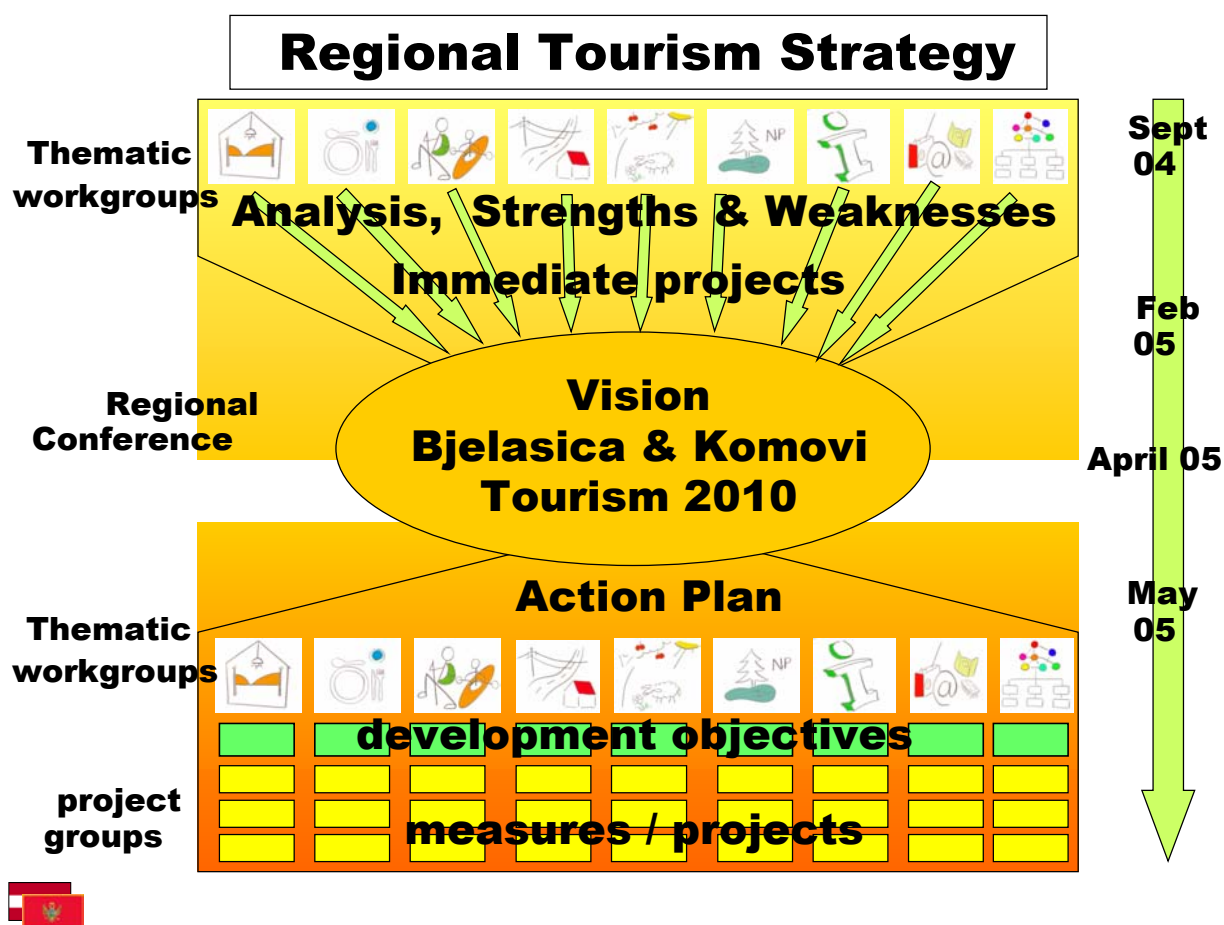
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1 Introduction

The central element of the project "Touristic and Ecological Development in the Bjelasica & Komovi-Region" is to develop an integrated regional tourism strategy which is the basis for a balanced development of tourism and successful regional co-operation.

About **100 stakeholders** of the 5 municipalities of B&K mountains, of the National Park Biogradska Gora and of NGO's discussed in numerous thematic workgroups (September 2004 – April 2005) the future of the tourism strategy of the region.

This overview shows the **process and time frame for the development the regional tourism strategy** in B&K mountains:



In spring 2005 the regional tourism strategy is presented to the public.



2 Analysis

2.1 The B&K region

2.1.1 Location

The Bjelasica & Komovi - region in the North of Montenegro consists of five municipalities (Bijelo Polje, Berane, Andrijevica, Kolašin, Mojkovac). In the heart of this mountainous region lies the National Park Biogradska Gora – home of one of the rare primeval forests of Europe and one of the oldest National Parks world-wide.

Map of Montenegro:



Map of project region:





2.1.2 Municipalities

Bijelo Polje:

50.000 inhabitants, altitude 570 m

situated directly on road to Podgorica – Belgrade and on rail connection Bar – Belgrade.

Municipality of **Bijelo Polje** is located in the valley of the Lim River. It is rich with archeological locations, as well as with cultural and ilir-romanian heritage. This municipality represents economical and cultural center of the north of Montenegro.

Berane:

35.000 inhabitants, altitude 670 m, 660 km²

situated on the road from Bijelo Polje to Rozaje

Municipality of **Berane** is settled in are of Gornje Polimlje, under the Bjelasica mountain. Almost 13,000 inhabitants live in the city downtown. Industrial production is slightly recovering, and during the period of the last couple of years trade and catering companies take significant place.

Andrijevica:

5,700 inhabitants, altitude 750 m, 340 km²

situated on the road from Berane to Plav

Municipality of **Andrijevica** is in the northern east part of Montenegro surrounded by the mountains Komovi, Bjelasica and Prokletije. In the center of town live around 1000 inhabitants, while remaining population live in the rural areas. Economic growth of the municipality is based on catering, trade and craft services. From the existing companies most frequent are small companies in the area of trade and catering. When it is about the tourist capacity of the municipality, Hotel "Komovi" with 90 beds is the most significant. The most important potential of this municipality is development of the mountain tourism.

Kolašin:

9,950 inhabitants, altitude 954 m, 894 km²

situated directly on road to Podgorica – Belgrade and on rail connection Bar – Belgrade.



Municipality of **Kolašin** is settled between rivers Morača and Tara. Thanks to the geographic position, Kolašin represents very important touristic and transit center of Montenegro. Almost half of the inhabitants live in suburban area. Economic development is based on natural resources. When it is about the economy, most developed are tourism, wood and metal processing industry. During the last year important role played companies dealing with trade.

Mojkovac:

5700 inhabitants, altitude 820 m, 367 km²

situated directly on road to Podgorica – Belgrade and on rail connection Bar – Belgrade.

Municipality of **Mojkovac** is located in the valley of Tara River and in the bottom of Bjelasica and Sinjajevina mountains. Its economy is concentrated in the area of wood processing in primary and final stage, metal industry as well as production of leather and textile. In the area of private business there is about 200 registered companies and entrepreneurs. Development of this municipality is based on healthy food production, wood processing, metal production and tourism development.

2.1.3 National Park Biogradska Gora

The Biogradska Gora National Park occupies the central part of the Bjelasica mountain massif in north-east Montenegro between the Tara and Lim rivers. The park covers 5,400 hectares. It is characterized by most typical forest vegetation. Protection of much of the present-day Beogradaska Gora National Park dates from 1878 when Kolasin was finally liberated from the Turks and ceded to Montenegro. In 1952 Biogradska Gora was proclaimed a national park. Over the years the boundaries of the park and its organized status have changed, but there has always been manifest an aspiration to achieve the basic aims of the park: protection and enhancement of the park's abundant authentic features.

Today, the park belongs to the National Park System of Montenegro and with three more parks (Durmitor, Lovćen, Skadarsko Lake) constitute a great, important resource of Montenegro. The National Park is located in the central part of Mt. Bjelasica, crisscrossed by streams and valleys, adorned with vertical rock formations and century-old trees. It is claimed that in this fairly small area the zonal vegetation of the entire northern hemisphere has been reproduced.

A very special place among the beauties of this National Park is the Biogradsko Lake, which is an ideal place for walks and to enjoy nature.



2.1.4 Geomorphological and topographical characteristics

B&K mountains are made up of the Bjelasica and the Komovi massif, both with a very different face: Bjelasica has a particularly gentle landscape with four main components (forests, meadows, water courses, rock verticals) and mostly rounded peaks. Komovi peaks drop virtually vertically gradually merging with wooded complexes of sub-Alpine forests.

The mountain range Bjelasica is a unique geomorphological unit. Owing primarily to intensive glacial activity in the region, a variety of geomorphological forms developed, from river valleys to glacial lakes to the highest mountain peaks. Of special note is the presence of eruptive rock occupying the central area of the Bjelasica. Also important is the moraine sediments which accounts for the formation of the glacial lakes.

The mountain range of Komovi (highest peak: Kom Kučki, 2,487 m) is situated in the southern part of B&K mountains. Komovi is a calcit massif with a rugged face. The scenery abounds in natural phenomena, scattered mountain huts add a picturesque note to the landscape.

2.1.5 Climate

The climate of the region varies depending on height ranging from 600 to 2,487 metres above sea level, reflects features of a northern hemisphere temperate climate. In height stratification it varies from temperate continental in the valleys of the Tara and Lim, to continental without fog on the mountain heights, with an average annual temperature of 9 – 2 °C depending on height.

On an average there are 1,900 hours of sunshine. Precipitation is high all year round (average rainfall amounts to 2,200 liters per square meter), snowfall forms an average cover from 70 to 200 centimetres that lasts 70 to 140 days.



2.2 Tourism in B&K

2.2.1 Main touristic assets

Bijelo Polje:

Sights/tourism activities: Rafting and cayaking on Lim, church of St. Peter and Paul, church of St. Nikolas in Nikoljac, remains of the Neolithic (on the location Bijedici) as well as Illyrian and Roman civilisations.

Berane:

Sights/tourism activities: Skicenter Lokve, diverse cultural events, ruins of Monastery Sudikovo, Monastery Djurdjevi stupovi, remains of Illyrian, Celtic and Roman settlements.

Andrijevica:

Sights/tourism activities: Church of St. Archangel, Park Knjayevac, river Lim.

Kolašin:

Sights/tourism activities: Monastery Moraca, National Park Biogradska Gora, Botanical Garden (private), Skicenter Bjelasica, canyons of the rivers Tara and Moraca in the north and the Mrtvica Canyon in the south.

Ski terrains and facilities have been built at Jezerine. From the facilities in this area there is a cable railway to the top of Čupova and further to the top of Ključ, and ski lift to Carev Do. Regarding the terrains and ski pists there are pists for all skiing categories: skiing and carving, sledging, snowboard, night ski, etc.

Mojkovac:

Sights/tourism activities: Monastery St. George, Tara-Valley, National Park Biogradska Gora.

Hot winter in the hills:

In the past few years, winter tourist offer is enriched with manifestation titled "Hot winter in the hills" organized by Tourist Organization of Montenegro and Ministry of Tourism. It lasts from 26th of December until the end of March. Program of this manifestations consists of different cultural, sports and other happenings. Some of them are winter sport competitions organized on ski pists (snow board, ski competitions...) than cultural happenings (like Montenegrin ski-fest) and numerous concerts that are fulfilling evening program of the ski centers.



2.2.2 Tourism industry

Regarding the tourist offer, the largest capacity is the "Bjelasica" Hotel (279 beds) in Kolasin, which is currently under reconstruction.

In the year 2004/2005 the region hosts 11 hotels and motels, offering momentarily around 680 beds. With Hotel Bjelasica opening up in summer 2005 the sum will go up to 950 beds. Many unregistered, private accommodation facilities are offered but are not shown on the following statistics:

municipality	Hotel***		Hotel**		Others		Motels		Privat	SUM
	No.	/ beds	No.	/ beds						
Kolasin	2	50	2	50	-	-	-	-	170	270
Bijelo Polje	1	30	1	80	-	-	-	-	-	110
Berane	1	10	1	86	1	165	-	-	-	261
Andrijevisa	-	-	-	-	-	-	-	-	-	0
Mojkovac	-	-	-	-	-	-	2	36	-	36
SUM										677

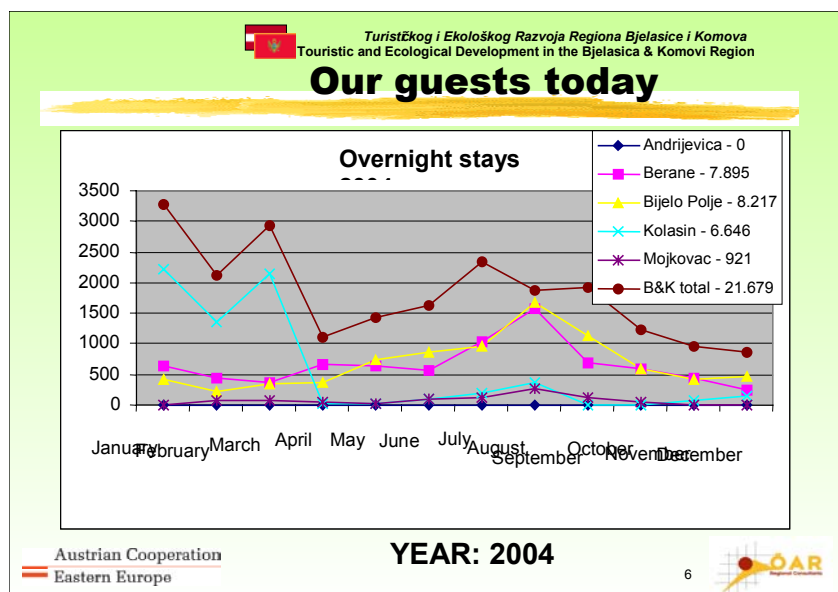
Some hotels have recently stopped to operate and are not shown on the statistic above (eg. Hotel "Mojkovac", etc.).

2.2.3 Our guests today

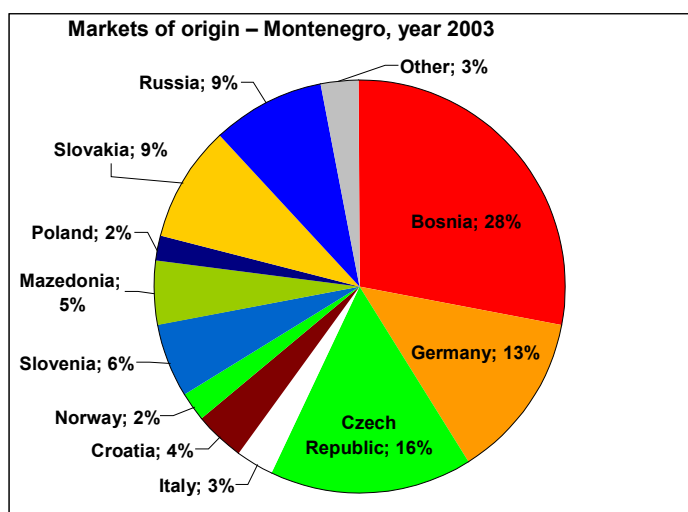
The B&K region registers approximately 22.000 overnight stays per year (2004). Aside from uncertainties explained below the monthly statistic for overnight stays in the B&K region shows this graph:

The real number of overnight stays is expected to be considerably higher due to the large 'grey market': accommodation provided on an unregistered basis.

One more factor concerning the actual number of guests and overnight stays is the correctness of official available figures: these figures are heavily depending on the reliability of counts in the local tourism office.



The most important source markets are **Montenegro and Serbia (estimated on 70 - 80 %)**. Also guests from Bosnia and a growing number of Albanians (in Winter only) are registered.

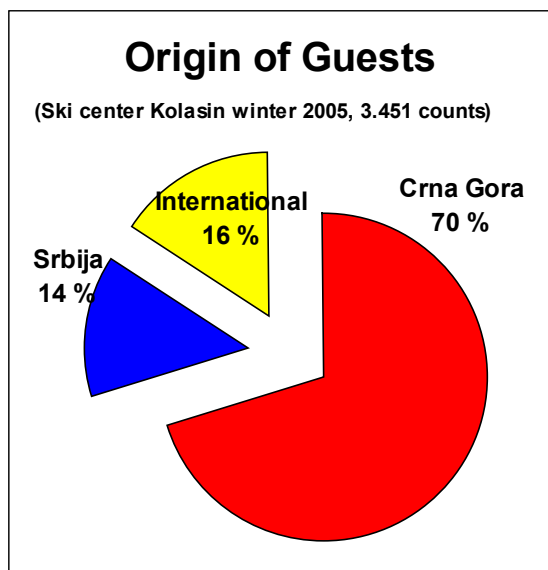


A small number of guests is arriving from Germany and the Czech Republic can be mentioned as statistically relevant.

A statistic on international guests to the B&K region is not available. The international guest count for Montenegro can provide some information and give hints for future relevance.



A **guest census** during the winter season 2004/05 in the Ski-center Kolasin has shown the following results:



The composition of the 70% Montenegrin guests is:

38%	Podgorica
30%	Region B & K
14%	Central Montenegro
11%	South of Montenegro
8%	Others

The international guests are mainly from Albania and few expatriates living in Podgorica and Skodra.



2.3 Strengths & Weaknesses of the regional tourism offer

The detailed analysis of strengths and weaknesses has been jointly elaborated with all relevant stakeholders of the B&K region.

2.3.1 Overview of strengths and weaknesses

The most important strengths and weaknesses are stated in the following brief overview:

- ☺ lovely scenery - mountains (hilly terrain/rugged), canyons, abundance of water
- ☺ panoramic views
- ☺ clean air, moderate temperatures
- ☺ good accessibility by rail and road from major source markets (Podgorica, coast, Serbia)
- ☺ National Park (8 - 12.000 visitors/year) with spectacular natural resources (very old trees, lakes, etc.)
- ☺ Hiking potential
- ☺ possibilities for active sports (rafting)
- ☺ some excellent restaurants serving regional specialities

- ☹ 2 skiing areas
- ☹ gastronomy (generally good, better offer of traditional domestic products and lower prices requested)
- ☹ staff: generally very friendly, little knowledge of foreign languages

- ☹ high precipitation
- ☹ road condition
- ☹ hotels (capacity, quality standards)
- ☹ environmental standards are not met (car wrecks in river-beds, waste problems)
- ☹ only little developed leisure offer
- ☹ no regional tourism organisation

2.3.2 Strengths and weaknesses per relevant area



General aspects



<ul style="list-style-type: none"> <input type="checkbox"/> lovely scenery - mountains (hilly terrain/rugged), valleys and canyons, abundance of water <input type="checkbox"/> climate: clean air, cool in summer, long winters with stable snow conditions and long snow cover <input type="checkbox"/> good accessibility by road/rail <input type="checkbox"/> High development potential with National Park Biogradska Gora (8 - 12.000 visitors/year) with old-grown trees, beautiful lakes, panoramic views <input type="checkbox"/> Some town centers are improved (e.g. Mojkovac renovates town center, with cafes, apartments) <input type="checkbox"/> „Korsos“ offer relaxing strolls in every town <input type="checkbox"/> Municipalities strongly support tourism development <input type="checkbox"/> Initiative and contacts of mayors help to facilitate communal development <input type="checkbox"/> Several national and international initiatives are active in the region <input type="checkbox"/> A positive image on the international market despite the vagueness of it <input type="checkbox"/> A high potential for human resources in tourism: friendly people in general, tourism schools for specialization, new faculty of tourism in Kolasin 	<ul style="list-style-type: none"> <input type="checkbox"/> climate: high precipitation - high seasonality, very few guests off-season, very short summer season <input type="checkbox"/> Only a vague image on the market <input type="checkbox"/> tourism demand confined mostly to Serbia and Montenegro <input type="checkbox"/> Road conditions bad, especially in winter <input type="checkbox"/> Lack of financial resources and government support for infrastructure investments (roads, touristic infra- and suprastructures, etc.) <input type="checkbox"/> Lack of entrepreneurial spirit amongst local population in general <input type="checkbox"/> few facilities for leisure activities and public recreation, shopping, cultural sights, etc. <input type="checkbox"/> cities lack attractivity (run-down buildings, problems with garbage disposal) <input type="checkbox"/> public transport not attractive for tourists, no clear information <input type="checkbox"/> Local population is little aware about the values of the natural environs and existing tourism facilities <input type="checkbox"/> little adequately qualified staff in tourism <input type="checkbox"/> Only little income and taxes generated by tourism ('grey market' incurs costs, pays no taxes) <input type="checkbox"/> Low investor interest, as issues of property ownership and investment incentives are unsettled <input type="checkbox"/> Low level of environmental consciousness among population - standards are not met (car wrecks in river-beds, waste dumps, sewage, environmental damages by mining, etc.) <input type="checkbox"/> Bottlenecks in supply (water, energy) <input type="checkbox"/> Lack of disposable financial resources for proactive initiatives in the municipalities <input type="checkbox"/> Value for money often not rendered
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Accommodation

<ul style="list-style-type: none"> <input type="checkbox"/> Some accommodation facilities are being renovated <input type="checkbox"/> Categorisation of most of the registered accommodation is finished <input type="checkbox"/> Some new rural accommodation units are being developed (Eco katuns) <input type="checkbox"/> Friendly service staff <input type="checkbox"/> Few good standard accommodation available 	<ul style="list-style-type: none"> <input type="checkbox"/> Inferior quality standards of rooms in most accommodation facilities <input type="checkbox"/> Bad quality of construction (noise sensitive rooms, no energy saving installations) <input type="checkbox"/> Insufficient capacity of accommodation in the region and in some municipalities <input type="checkbox"/> Difficulties for entrepreneurs to get favorable loans for quality and capacity improvement <input type="checkbox"/> Many not officially registered private accommodation <input type="checkbox"/> Hotels / pensions do not offer anything apart from sleeping and eating (leisure infrastructure, sauna, children playground, ...) <input type="checkbox"/> Lack of competent management in some of the hotels <input type="checkbox"/> staff lacks knowledge of foreign languages and of knowledge about the region <input type="checkbox"/> Bad signposting of hotels / pensions (where are hotels, free rooms, ...) <input type="checkbox"/> Lack of transparency of the offer (little information for tourists available, ..)
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Gastronomy

<ul style="list-style-type: none"> <input type="checkbox"/> Some restaurants offer Montenegrin cuisine <input type="checkbox"/> Very good local products are offered in many restaurants (ham, cheese, pickles, ...) <input type="checkbox"/> Very friendly service staff <input type="checkbox"/> Traditional hospitality <input type="checkbox"/> Traditional recipes are known and used <input type="checkbox"/> Many cafes and bars <input type="checkbox"/> Good national wine and local spirits (Sliva) available <input type="checkbox"/> restaurant and spring of mineral water "Kisjele vode" in Bijelo Polje 	<ul style="list-style-type: none"> <input type="checkbox"/> Not enough promotion of traditional / regional home-made products <input type="checkbox"/> Lack of menu cards with translations into foreign languages <input type="checkbox"/> Lack of educational literature and traditional recipes adapted to modern consumption habits <input type="checkbox"/> Presentation of meals is often poor (size of portion, garnish, etc.) <input type="checkbox"/> Support from official institution <input type="checkbox"/> Lack of qualified management and staff <input type="checkbox"/> No direct merchandising of local ecological food
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Summer	
Hiking: <ul style="list-style-type: none"> ❑ Mountains boast a wonderful basis for hiking offer: mountain tops, lakes and panoramic views ❑ Large variety of hiking paths available ❑ Some hiking paths are already (partly) marked ❑ Some tour operators offer special hiking tours (photo safari, horse trekking, ...) ❑ Hiking map is available (- but not actively displayed and distributed) ❑ Many mountain and hiking associations are active in the region ❑ Good potential for climbing ❑ some mountain huts available ❑ Traditional festivals in each municipality ❑ New two days festival Komovi-Bjelasica (planned for 2005) 	<ul style="list-style-type: none"> ❑ Signposting and marking of the hiking paths is not sufficient ❑ Lack of mountain huts (with lodging facilities) and shelters for hikers ❑ Lack of attractive information material about hiking offer ❑ (Information about) easy and fun-oriented hiking tours for families with kids are missing ❑ Hiking offer is not well co-ordinated (among municipalities, among mountain associations, ..) ❑ Additional infrastructure on hiking paths is missing (rest places, shelters, ...) ❑ Lack of possibilities to rent or buy hiking equipment in the region ❑ Some hiking paths are quite dangerous (Komovi, canons) and safety installations are missing ❑ Insufficient mountain rescue system ❑ Only few ambitious local hikers - little hiking-culture amongs local population



<p>Other active sports:</p> <ul style="list-style-type: none">❑ Some “adrenaline” activities offered by tour operators (rafting, ..)❑ Activities around, in and on Biogradsko Jezero and others lakes in Bjelasica❑ Paragliding In Mojkovac and Bijelo Polje❑ Tennis school Berane❑ Good potential for mountain biking, growing interest expected❑ Annual mountain biking event (race) good basis for promotion and further development <p>Culture:</p> <ul style="list-style-type: none">❑ Some interesting cultural heritage sites (Moraca mon., Cirilovac mon., Djurdjevi stupovi, Duzcevi stupovi, mon.Dobrilovina, mon.Celije-Kaludra, Church St.Petar (XII c), Knjazevac memorial park, Mosque XVc Bijelo Polje-Radulici, ...) <p>Fishing / Caving:</p> <ul style="list-style-type: none">❑ Good potential for fishing in rivers and lakes❑ Potential for speleology (caves could be opened up for visitors – should be protected sites but also carefully developed!)	<ul style="list-style-type: none">❑ The offer is not sufficiently transparent, neither for local population nor for tourists❑ Range of active sports possibilities is very limited (additional offer necessary: mountain climbing, paragliding, ...)❑ Low security standards❑ No marked mountain biking track❑ Lack of renting facilities for mountain biking <ul style="list-style-type: none">❑ Lack of cultural events (regional festivals, local happenings...)❑ Lack of information about opening hours of museums <ul style="list-style-type: none">❑ Poor organisation and transparency of the fishing offer (permits, rental of equipment, ...hunting)❑ Garbage and car wrecks in river beds
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Winter

<ul style="list-style-type: none">❑ Ski centers in Berane-Lokve<ul style="list-style-type: none">- Good condition for ski competition in ski-centers- Petnjik – Berane small ski center for kids 1200m (ski- and equipment-rental, bob slope for kids)- Ski school Berane- Rent of ski equipment available❑ Ski center in Kolasin:<ul style="list-style-type: none">- Good snow conditions, snow security because of altitude of ski center (1400m-1900m)- Well located gastronomy with high capacity- Baby and kids lifts can be observed from restaurant- 1 long slope, 1 slope on top- ski and sledge rentals- ski school and snow board instructors- relatively few skiers: no waits❑ High potential for nordic skiing (cross country, skating, biathlon, etc.)❑ High potential for ski touring (= back country skiing, no lifts necessary, trekking on mountains tops with furs on skis, downhill on untouched snowed-in slopes).	<ul style="list-style-type: none">❑ NO winter offer in municipalities except Kolasin and Berane❑ No winter offer for non-skiers (horse sledges, nordic skiing, snow-shoe hiking, winter hiking trails, tracks for sledges, ice skating, ...)❑ No Sauna and indoor facilities❑ No sign posting at slopes❑ No information at lifts (orientation, where get out, environment protection, technical data, ...)❑ Slopes are often not well prepared❑ Lift opening hours❑ Only few alternatives for lifts and slopes❑ Conditions not optimal for snow boarding❑ Access road to ski center in bad condition❑ Clearing of roads of snow is not optimal: often waits until access (to villages, hotels, ski centers) is possible❑ Costly infrastructure investments needed to fulfill the very high level of alpine skiing standards❑ No investors for the build-up of new ski centers or for renovation of existing infrastructures❑ Ski lifts have high operational expenses to be covered on the long run.
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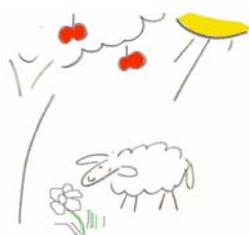
In General

- | | |
|--|--|
| <ul style="list-style-type: none">❑ Trend in local population to also get into active sports and leisure | <ul style="list-style-type: none">❑ Lack of touristic activities offered for bad weather or for evenings❑ Lack of leisure offer for families with kids❑ No facilities for swimming, wellness (sauna, massage, steam bath, ...) |
|--|--|



National Park

<ul style="list-style-type: none"> ❑ Extraordinary beauty of nature and landscape (lakes, canyons, trees, plants ...) ❑ NP is located next to the main transit road and railway between Belgrade/Serbia and the coast ❑ Attractive hiking path around the lake ❑ Boat rental on the lake ❑ Parking fees for cars/busses in the NP ❑ Restaurant has a very attractive location at the lake (- but poor quality of infrastructure) ❑ Accommodation available in the NP (- but inferior quality) ❑ Scientifically research tourism in the region ❑ High potential for tourism when developed in co-operation with other National Parks of Montenegro 	<ul style="list-style-type: none"> ❑ Few visitors (~10.000/year) and therefor low educational and economic effects generated ❑ NP employees work only as guards and not as guides ❑ Infrastructure for visitors not sufficiently developed (observation platforms, access to river delta, rest places, ...) ❑ No visitor programmes: for schools, families, children ❑ No tourism relevant information and marketing material about the NP (beside scientific books and brochures) ❑ No explanatory and educational signposting in the NP ❑ Uncontrolled invasion and transit of vehicles through NP (no roads blocked) ❑ Low level of co-operation between NP and tourism agencies + operators (joint programmes and marketing, NP information activities in municipalities and tourism centers, ...) ❑ Lack of marketing activities to generate more visitors (signposts at transit route, co-operation with Ministries & schools, marketing material, ...) ❑ High dependency of the NP on directions from National Parks Montenegro ❑ Open to public May 1st – Oct. 1st
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Rural Tourism

<ul style="list-style-type: none"> ❑ Traditional milk, cheese and cream production (but no further developed recipes) ❑ Ecological food available ❑ Traditional production of cereals, fruits and vegetable ❑ Meat production available ❑ Large variety of herbes, mushrooms and berries are collected in the forests ❑ Some local initiatives (with international assistance) to support the production and marketing of agricultural products from the region 	<ul style="list-style-type: none"> ❑ No special branding and marketing of agricultural products from the region ❑ Difficulty for local farmers and food producers to sell their products (to tourism enterprises, to tourists, to external markets) ❑ Few facilities for tourists to buy agricultural products and souvenirs from the region (e.g. local markets) ❑ There are no quality standards for local agricultural products ❑ NO capacity for packing fruit and vegetable ❑ Few or no companies processing agricultural products (jam, juice, frozen or dried products, etc.) ❑ NO integrative association taking care about standards of products and co-operation of farmers
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Tourist information

<ul style="list-style-type: none"> ❑ Ministry of Tourism and National Tourism Organisation support visitor information in the region ❑ Some tourism actors also use electronic media and internet for information / promotion ❑ Some municipalities have web presentations (Berane, Andrijevica, ecotourism.cg.yu) 	<ul style="list-style-type: none"> ❑ Lack of visitor information material and brochures (regional leisure offer, hotel guide, ...) ❑ Insufficient signposting (tourism infrastructure, orientation, attractions, sights, hotels, ...) ❑ Local population and staff in tourism enterprises can not provide information for visitors ❑ Lack of regional (!) information material ❑ A clear visitor information concept (who provides what information in the region) is missing ❑ (Local) visitor information center(s) are missing ❑ various information providers are competing ❑ Lack of foreign language skills
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Marketing

<ul style="list-style-type: none"> ❑ Some individual enterprises have active and professional marketing (brochures, internet, contacts) ❑ Sustainable tourism approach of the region fits well into the National tourism marketing concept and national level is willing to support marketing of the regional products ❑ National Tourism Organisation helps to promote the B&K region ❑ "National cuisine" initiative is attractive 	<ul style="list-style-type: none"> ❑ No clear target group concept for tourism of B&K ❑ No regional initiative or even concept (what product, what markets, what activities, responsibilities) for national and international marketing ❑ No regional brand for B&K region (logo, slogan, corporate identity, corporate design, ..) ❑ There is almost no regional marketing material available (internet, photo archive, brochure, posters, ...) ❑ No budget for (regional and local) tourism marketing ❑ The regional tourism product has no clear and generally accepted profile ❑ No souvenirs (merchandising products and and give-aways) from the region are available ❑ No market and guest surveys are available ❑ There is no strategic market observation in the region ❑ Few incoming travel agencies available
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<ul style="list-style-type: none"> ❑ Tourism law 2004 shifts competencies and finances for tourism to municipality level ❑ Local tourism boards are or have to be installed ❑ Chance for a regional tourism association (legal possibility, general willingness of municipalities) ❑ Some quite active tourism enterprises (travel agencies, hotels) ❑ Active NGOs (ecological associations, mountain associations, ...) 	<ul style="list-style-type: none"> ❑ Lack of finances on local level out of local tourism taxes (many tourism enterprises do not pay taxes) ❑ No concept for tasks and responsibilities for tourism development, information and marketing between national, regional, local and individual level ❑ Lack of information flow and co-operation between enterprises, local tourism organisations, National Tourism Organisation and Ministry ❑ Lack of tourism relevant information and co-ordination among the 5 municipalities ❑ Lack of co-operation / co-ordination between National Park and municipalities ❑ No joint activities of municipalities for tourism development , information and marketing ❑ Lack of qualified staff in municipalities and National Park for tourism issues
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3 Important international trends in tourism and relevance to Montenegro / B&K mountains

The international social, political and behavioural trends¹ detailed below will rarely work in isolation, and will in fact influence one another and change through time. The potential overall result will be the polarisation of tourist tastes which, on the one hand, will solidify the attraction of **mass market mainstream** tourism to developed destinations, whilst at the same time generating **demand for individualised or niche tourism products**. This will have implications for marketing activities, with the need to match product with demand whilst achieving the right quality/price balance.

3.1 Environmental awareness

Environmental awareness is on the increase, with mainstream political parties paying more than lip service to environmental issues, and so-called Green parties becoming a political force in their own right in some European countries. Water cleanliness, air pollution, recycling, water shortages, flora and fauna protection, amongst other issues, are being addressed. Europe is, on the whole, characterised by relatively high living standards and levels of education, two factors which help to explain increased environmental awareness in the continent. This awareness is further increased by the high standard and availability of media reporting of major events and issues. These reports are likely to feed into increased awareness of tourism development issues and lead to increased scrutiny on the part of the public in destination decision making, plus the growing requirement for tourism developments to be sustainable. Indeed, such awareness may in itself generate demand for niche tourism products. These products will range from small volumes of those with a special eco-interest involving serious study of a chosen subject, through to large volumes of resort or general interest holiday makers wishing to incorporate a day trip to, say, a nature reserve or cultural site.

Situation in Montenegro:

Although Montenegro proclaimed "Ecological state" more than a decade ago, environmental awareness in Montenegro is pretty weak. Everyday attitude of population according to environmental protection, due to a lack of standards and consciousness, are pretty far away from EU standards. There are only few NGO projects that address environmental problems. There are no Green political parties of relevance in Montenegro.

The low living standard and the lack of awareness might be the main enemy of environmental protection. However, the ministry of tourism is working on a campaign for cleaning tourism resorts called "Let it be clean".

¹ Source: Tourism 2020 Vision, Volume 4 – Europe, World Tourism Organization, July 2000



But: Environmental awareness is growing very slowly among Montenegrins. Therefore, initiatives have to be started in order to make Montenegro an attractive holiday resort.

3.2 Quality of services

In many respects, European travellers expect high levels of service at a value-for money price. If they do not get this premium quality, they are liable to not return again and might even spread negative word of mouth.

Situation in Montenegro:

Local market: Quality expectations are slowly raising mostly among “new rich” Montenegrins.

International market: Quality offered for incoming tourist to B&K mountains is in many aspects not adequate (see analyses of strengths and weaknesses), especially concerning the quality of accommodation, the foreign language skills of tourism professionals, etc.

It is of utmost importance to **focus on a high quality** development of tourism offers in the future in order to attract and satisfy international guests.

3.3 Living in urban areas

The majority of Europeans live in densely populated urban areas. This in itself prompts certain types of tourism demand: rural escapes, short breaks, self catering holidays, city breaks, out-of-season holidays, activity based trips, and so on.

Situation in Montenegro:

Montenegro has a small population (about 660 000 people) with **little disposable income**. There are no big cities except Podgorica which has less than 200 000 inhabitants. Therefore, some of the general European trends according to demand have not such a strong influence. Trend to more nature-oriented and activity-oriented holidays (like new sports) is becoming a trend for singles and younger families with school kids.

In General: Montenegrins and former Yugoslavs (except Slovenians) do not have high appreciation of weekends. Often they do not plan activities for the weekend, mostly stay at home or work for weekends.

3.4 Remote and less known destinations

As the world becomes increasingly known and fewer new destinations are left for tourists to discover, there is a trend to travel to more remote and less well known and accessible locations.



Situation in Montenegro:

Tourists from Montenegro are less travel-experienced, compared to international standards, but also compared to Serbian and Eastern European standards. The focus for their (first) tourism experiences is more on Central Europe than on remote and less known destinations.

Concerning **source markets** in Central Europe this trend bears good chances for B&K Mountains: The region is little known on the one hand and is remote enough on the other to arouse interest. Montenegro in general has a vague but positive image.

3.5 Relaxed Visa requirements

National controls on travel have progressively eased over recent years as the economic benefits to be derived from tourism have become more widely recognised. The most significant examples relate to the easing of travel restrictions to a number of countries in Eastern Europe. This is a trend set to continue into the next century. Visa requirements are becoming more relaxed throughout much of Europe, whilst political agreements, such as that between the so-called Schengen countries, may help dispense with the need for passports altogether.

Situation in Montenegro:

Montenegro used to be quite isolated during the previous decade. Montenegrins were travelling only little, due to VISA problems (economic sanctions of the international community) and due to little disposable income.

Today "new rich people" tend to discover Europe and international destinations. One part of people (less than 10 %) go for business trips out of Serbia and Montenegro.

Relaxed Visa requirements will on the one hand enable Montenegrins to see more of the world and will on the other hand opening up new chances for international guests to come to B&K mountains for a holiday.

3.6 Demography

In terms of demography, all the indications are that the proportional share of older citizens will increase in Europe's mature economies, whilst workforces will contract as the number of young people stagnates. As a result of this, there will be an increase in demand for tourism products suited to the older market segments. Further, North European workforces will be supplemented by migrants from the south of the continent, which in itself will create demand for travel and tourism with a greater emphasis on value-for-money.

Western society is experiencing record divorce rates, later marriage and families, and increased single parent households. The implication of this is that there are a greater variety of households or household segments for which the travel and tourism industry has to cater.



Situation in Montenegro:

This trend can also be observed in Montenegro: population is getting older: Birth-rate is decreasing (Year 1950 20,7 promilles, year 2000: 5,7 promilles). There are 11, 52 % people older than 65 years. The average age in Montenegro is 34 years.

Therefore, the above mentioned developments (products for older market segments, greater variety of household segments to cater for) are also of importance for B&K Mountains.

3.7 Information technology

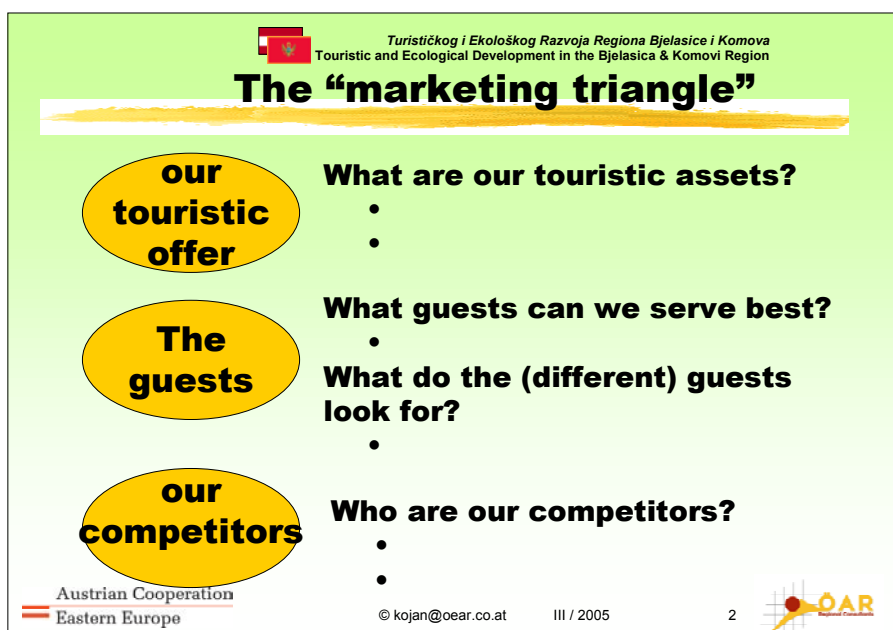
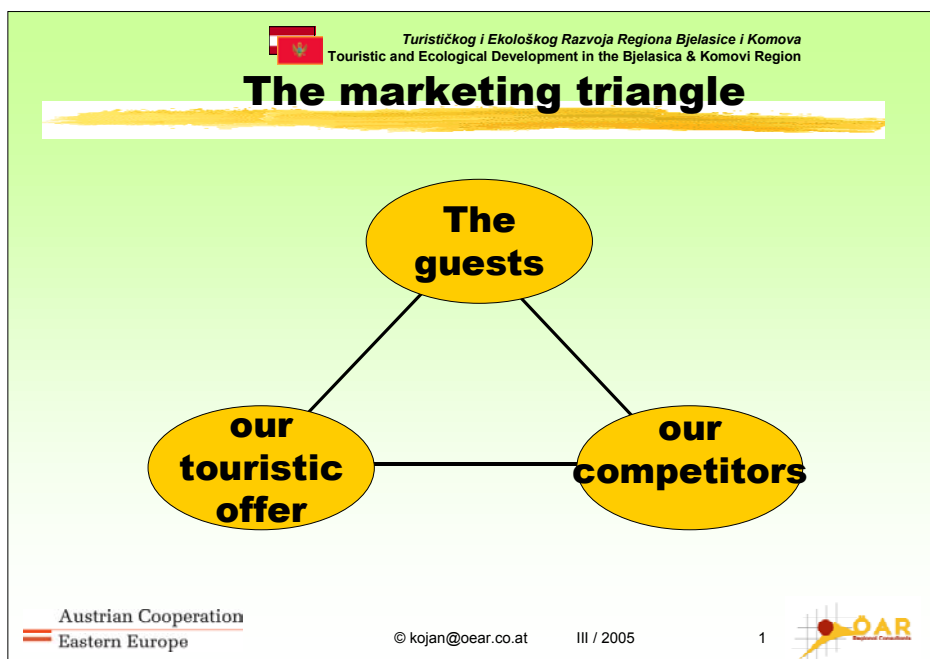
Continuing advances in information technology and the lowering of travel costs to travellers have helped accelerate the increase in tourism numbers, and in many respects this reflects the globalisation process so apparent today.

Situation in Montenegro:

Using ICT for tourism purposes (pre-information, reservation, webpages of hotels or travel agencies) is underdeveloped according to European and world-wide standards. The use of credit cards in hotels and restaurants is also only in a starting phase.

4 The marketing triangle

In order to develop an integrated tourism product the three main components of the marketing triangle have to be carefully analysed and observed, respectively strategically planned: The competitors, the guests and the touristic offer itself.



5 Relevant competitors

For the different seasons the following competitors are of relevance:

Winter	Summer
<ul style="list-style-type: none"> ❑ Zabljak ❑ Kopaonik ❑ Jahorina ❑ Zlatibor 	<ul style="list-style-type: none"> ❑ Zabljak ❑ Kopaonik ❑ Jahorina ❑ Zlatibor ❑ Other mountain regions of Montenegro (Moraca, Prokletje, coastal mountains, etc.)

5.1 Zabljak

- **USP / competitive advantage Summer: Tara Canyon (UNESCO's world heritage), Historical place/national legends (Marko Kraljevic, Serbian hero)..**
- **USP / competitive advantage Winter: Highest town in Balkans (1465m). Ski center number 1 in Montenegro**
- Special jewels: 18 lakes called "Gorske oci" (mountain eyes). 15 peaks above 2000m.
- Impressive bridge – Djurdjevica Tara (365 m long and 165 m height).
- Montenegrin centre of mountain tourism
- Event "Hot winter in the hills" (include: cultural and music festivals, mask balls, exhibitions, performances, sport events)
- National Park Durmitor with the Canyon of the river Tara, Biospherereserve
- 1000 beds in hotels, the accommodation is also provided in the country households, motels and camps
- 90 000 overnight stays – (22000 of them foreign guests), Origin of guests: Domestic guests (Serbia and Montenegro), Central and Eastern Europe, expatriates
- Price level in general: During the winter season - highest in Montenegro, but competitive according to Kopaonik (see sample)
- Accessibility of region (road/rail): From seaside -5 hours by car, from Belgrade – 7 hours, Albania – 5 hours, Podgorica 3-4 hours
- Remark: Road Risan – Niksic- Zabljak is to be built. That would make this region much more approachable for guests from seaside and from Podgorica and Niksic.



5.2 Kopaonik

- **USP / competitive advantage Winter: Kopaonik is a beautiful mountain range in the Southeastern Europe, the strongest brand (most popular) ski center in Serbia and Montenegro**
- **USP / competitive advantage Summer: Kopaonik offers a large array of sports and recreation activities**
- **Other strengths: First class of the ski tracks, approximately 200 sunny days ("Sunny mountain")**
- Tourist offer in general: The highest quality one in Serbia and Montenegro,
- Seasons catered for, seasonal offers: All year long Kopaonik offers great conditions for active holiday
- Winter offer: convenient to all categories of skiers, extreme sports, great paragliding conditions, festivals, numerous natural spas in surroundings
- Summer offer: riding, tennis, squash, basketball, jogging, aerobic, "health trail" walking, summer language schools, business schools, tennis schools, riding schools, rafting
- Special offers, e.g. events: Language schools, reducing weight programs, excellent paragliding conditions, numerous natural spas in surroundings
- National Park (since 1981)
- Number of beds, quality of accommodation: 6,500 beds (on the territory of Raška Municipality). There is a higher quality of accommodations as compared to the competitor destination in region.
- Number of overnight stays: Kopaonik Technical Center, located in the heart of the National Park, manages up to 120 000 tourists a year with more than 700 000 overnights, out of which foreign guests number up to 30 000 with 120 000 overnights.
- TOTAL NUMBER of officially registered guests in 2004: 85 356 guests. Number of officially registered overnight stays in 2004 was 409 106 (388 351 domestic guests' overnight stays and 20 755 foreign guests' overnight).
- Origin of guests: Serbia and Montenegro, Eastern and South Eastern Europe, some western guests (England etc.)
- Price level in general: high
- Accessibility of region (road/rail): Belgrade – 4 hours, Montenegrin coast – 9 hours, Podgorica – 8 hours Albania – 9 hours



5.3 Jahorina

- **USP / competitive advantage Winter: Balkan winter sports center**
- **Olympic mountain (Winter Olympic games 1984 were organized there)**
- **Over 20 km of tracks for Alpine skiing with four modern chair and four drag lifts with a total capacity of 7500 skiers per hour, modern ski-school and ski-service. Beside the Alpine skiing, there are: cross country skiing, sledging, night skiing, pleasant walking, shopping in specialized shops, night entertainment in the hotels in Jahorina available.**
- **USP / competitive advantage Summer: Best availability of the day and night entertainment and shopping**
-
- **Touristic offer in general: offers high QUALITY**
- Seasons catered for, seasonal offers: In the summer time the mountain is favourable for high-altitude hikes, trekking, gathering forestry fruits and medical herbs.
- Winter - tourism season, depending on snow condition, starts on 15th of December and lasts till 15th of April
- No National Park
- Number of beds, quality of accommodation: Total capacity (with surrounding area) = 6000 beds
- Number of overnight stays: 200 000 overnights
- Origin of guests: Bosnians, Croatians, Serbians, Eastern and Western Europeans
- Price level in general: Middle
- Accessibility of region (road/rail): from Belgrade - 5 hours , Podgorica - 7 hours, Montenegro Coast - 8 hours, Albania - 8 hours
- Other important remarks: This ski center is still suffering from image of war place and the fact that there were mine fields in surrounding.



5.4 Zlatibor



- **USP / competitive advantage:** Winter sports centre-very important for Serbia and the region. Well-known for health and recreational tourism. Across the mountain of Zlatibor the mountain and sea currents collide which help in curing lung and heart/cardiac patients. In the last couple of years many sports terrains, ski trails and ski lifts have been built, which have supplemented the tourism offer of this mountain. On Zlatibor great attention is given to the diversity of cultural events and visits to cultural sites. Development of rural tourism is in its ascent year after year.
- **The General tourism Offer:** the mountain and tourism stakeholders/workers are more dedicated to the development of health and recreational tourism than to ski tourism. During the whole year there is a diverse tourism offer.
- **Special offer:** Visit to the Staro Selo Museum (Old Village Ethnographic Museum), Stopića Cave, Uvac Monastery, Brvnara Church, hunting and fishing (Zlatibor is very rich with fish and game)...
- **Number of beds/accommodation:** 9100 registered and about 5000 unregistered beds. About 50% of the private accommodation is 4 * and 48% is a 2* accommodation, the rest of the beds are of last category. In the hotels there is only about 400 beds which belong to the 4* category.
- **Number of nights** in the period from 2001-2004 ranged between 455.418 and 470.000, while the largest number of overnights was achieved/realized in 1990 and numbered 643.613.
- **Source markets:** the guests are mainly from Serbia, Montenegro, Bosnia and Herzegovina, FYR of Macedonia and from some European countries.
- **The general price level** is average/medium.
- **Accessibility of the region** (roads/rail): from Belgrade 3-4 hours, from Podgorice 4,5 hours, from the Montenegrin Coast 6 hours and from Albania 6-7 hours
- This Tourism Centre is organised on the level of the Local Tourism Organisation, which cooperates with the Municipality and is financed partly from the Municipality Budget and in a larger part from the tourism tax. The annual Budget of the Local Tourism Organisation is between 200.000-300.000 euros.
- **Other important notes:** This centre gives great attention to the development of mountain-rural tourism and preparations of sports teams, which is the future of this mountain.

5.5 Other Mountain Areas in Montenegro

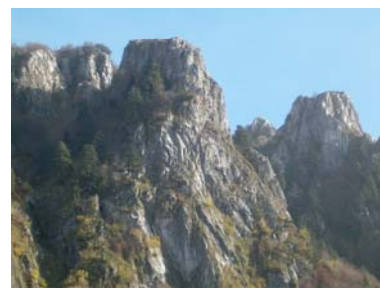
Morača: The Moraca canyon is known by its very attractive and adventurous part of nature.

- Known by the **Moraca Monastery**, which is simply the protective trademark of our region. The Moraca Monastery was built in 1252, and it is a "must" stop for tourists and visit to this cultural treasure.
- The Moraca canyon goes all the way from Podgorica to Kolasin and lures with its beauty.



Prokletije: Just a smaller part of the Mountain Range of Prokletije reaches into Montenegro, and its larger part is in Albania.

- The highest peak is Maja lake (2694) on the Albanian territory, Djeravica (2656m) on the Serbian and Bogicevica (2358m) on Montenegrin territory.
- **Specifics:** great potential for mountaineering. The starting point for the exploration of the Prokletije Mountains is the **Grabaja** valley with two mountain cottages.
- **Special offer: Ali Pasa's Springs** – the recognizable vacation area for tourists and local citizens. Beautiful mountain lakes : Plavsko lake, Ridsko and Visitorsko lake.
- **Interesting item:** Visitorsko Lake is especially interesting because of the floating island on its surface.
- The initiative to proclaim the Prokletije Mountain area as a national park has been planned for long time now.
- **The accommodation capacities** are located mostly in Plav and a smaller part in Gusinje.



Orjen: A very rare destination in the world where you can swim in the warm Adriatic Sea and within a one hour walk you can ski down the Orjen slopes.

- **Specifics:** In this part of the mountain there is snow until the end of May, thanks to the largest quantity of precipitations/rainfalls in Europe
- **Special offer:** An ideal destination for active vacations – mountaineering, alpinism, and scientific observations. This is a real paradise for speleologists, an area full of speleological facilities, pits and caves.
- Accommodation capacities are located in the nearest coastal cities (Bar...)





6 Future source markets

6.1 Estimation of future source markets

A rough estimation about possible future source markets for B&K has been drawn up. A separation between summer and winter seems advisable.

Future source markets for Winter:	% of total numbers
Inhabitants of Montenegro	60 %
Inhabitants of Serbia	20 %
International guests:	
- Inhabitants of Albania	15 %
- expatriates living in Montenegro/Podgorica	5 %
- expatriates living in Belgrade, Tirana, Skodra, Pristina	
- others	

Future source markets for Summer:	% of total numbers
Inhabitants of Montenegro	50 %
Inhabitants of Serbia	30 %
International guests:	20 %
- guests visiting the coast of Montenegro	
.....- special interest groups, e.g. hiking associations central Europe, National Park visitors / hikers from other Balkan Countries, from Czech Republic, etc.	
.....- expatriates living in Montenegro/Podgorica	
- expatriates living in Belgrade, Tirana, Skodra, Pristina	
- others	

6.2 Profiles of guests of source markets²

Markets	Profiles of guests
Montenegro	<p><u>General:</u> There is a raising awareness among Montenegrins about belonging to the family of European nations, as well raising of national identity. Therefore, tourism offer should include »<i>Fulfilled challenge</i>« combined with »<i>having fun like Europeans do</i>«. This statement is important mostly for younger single people, and younger couples with small kids and without kids. According to raising national identity, some vacation that would include ethno-concept (Montenegrin tradition and culture) should be included.</p> <p>Profile:</p> <ul style="list-style-type: none"> ✓ Montenegrins (middle class) prefer to arrange their own vacation. ✓ The most important criterion for choosing some destination is a price competitiveness and accessibility. ✓ Montenegrins mostly like to travel by car. ✓ Younger people tend to go to vacation in a group, but also expect to made personal contacts and new friends. <p>WINTER:</p> <ul style="list-style-type: none"> ✓ Younger people (singles)going to ski (from Podgorica and seaside mostly) ✓ Younger people (from Podgorica and seaside mostly) coming to festivals/events ✓ Families with small kids going to ski (from Podgorica and seaside mostly) <p>SUMMER</p> <ul style="list-style-type: none"> ✓ Elder people focused on health tourism ✓ Elder people visiting relatives ✓ Younger single people going with friends, hiking, biking, exploring nature and performing some sport activities ✓ Groups of pupils and teachers (summer schools) ✓ Special interest groups (scientists exploring national parks) ✓ Volunteer tourists from all over Montenegro, but also from surrounding countries and Europe (High school and University students) ✓ Incentive travelers

² Sources: The information stated are unpublished results based on surveys carried out within the frame of the project "Touristic and Ecological Development in the Bjelasica & Komovi-Region" (Internet researches, interviews with stakeholders, desk research).



Serbia	<p><u>General:</u> There are lot of similarities with Montenegrin tourist profile, expect that there are more big cities in Serbia and more urban lifestyle tourists. Also, Serbians are not in the same stage of raising national identity. Since there are more people coming from the big cities, packages with some easy sport activism for prevention or reduction of stress should be included. Serbian tourists coming from urban areas (which should be the main target group) are more sophisticated than Montenegrins and more ready to accept challenges. Cosmopolitanism is much more present among people from Belgrade, Novi Sad, Nis, Subotica, comparing to Montenegro.</p> <p><u>Note:</u> Since people from northern part of Montenegro have traditionally had very close national identity with Serbians, that can be used as a strength of Bjelasica and Komovi when targeting Serbian market.</p> <p>Profile:</p> <ul style="list-style-type: none">✓ Serbian tourists - more sophisticated than Montenegrins, especially the ones coming from the big cities.✓ Much more younger people ready to take action in adventure sports✓ Serbians (middle class) prefer to arrange their own vacation.✓ The most important criterion for choosing some destination is a price competitiveness and accessibility.✓ Younger people tend to go to vacation in a group, but also expect to make personal contacts and new friends.✓ Incentive travellers <p>WINTER:</p> <ul style="list-style-type: none">✓ Younger people (singles) going to ski✓ Younger people coming to festivals/events✓ Families with small kids going to ski✓ Younger single people interested in adventure tourism✓ Incentive tourists <p>SUMMER:</p> <ul style="list-style-type: none">✓ Elder people focused on health tourism✓ Elder people visiting relatives✓ Elder and middle age people attending cultural events/festivals✓ Younger single people going with friends, hiking, exploring nature and performing some sport activities, group of pupils and teachers (summer schools), special interest group (scientists exploring national parks)✓ Younger single people interested in adventure tourism✓ Volunteer tourists from all Serbia (High school and University students)✓ Incentive travellers✓
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Albania	<p><u>Important note:</u> Albania still has important (existing) middle class, (not like in Montenegro, Serbia and former Yugoslav states). Also, Albania was isolated for a long time. Therefore, Albanian tourists are curious and they are not focused on »value for money« concept only.</p> <p>Profile:</p> <p>Tend to discover culture and history, tend to go shopping, mostly go with family and friends, single people and groups of friends tend to spend lot of financial resources for fun (cafe bars, restaurants, disco-clubs).</p> <p>WINTER:</p> <ul style="list-style-type: none"> ✓ Families going in groups with friends to ski ✓ Younger people coming to festivals/events (if something like that is to be organised), ✓ Families with small kids going to ski ✓ Incentive tourists <p>SUMMER</p> <ul style="list-style-type: none"> ✓ Families with kids going to explore nature ✓ Families interested in meeting new culture tradition, food ✓ Younger single people going with friends, hiking, exploring nature and performing some easy sport activities ✓ Weekend visitors ✓ Incentive tourists ✓ Groups interested in shopping (of local products), (if shopping event could be organised)
International markets	<p>Expatriates Podgorica, Belgrade, Tirana, Skodra, Pristina</p> <ul style="list-style-type: none"> ✓ Expatriates in Serbia and Montenegro typically work in international companies, international organisations and NGOs . Most of them are in Belgrade (for Montenegro: in Podgorica). They travel often (3% once a week, 10 % twice a week, 24 % once a month, 62 % once in two months) ✓ Men and younger expatriates travel more frequently than others ✓ Among the expatriates there is substantial interest in getting to know the coast and other tourist resorts ✓ The majority stay in hotels (72%), private accommodation (18%) and tourist apartments (4%) ✓ Type of accommodation: 4 – 5 * (41 %), 3* (46 %) ✓ The younger (51%) and highly educated (53%) travel twice or more times more often ✓ Mountain tourism: Zlatibor is the favourite destination for older expatriates (29%) while younger expatriates prefer Kopaonik (27%) ✓ expatriates in Serbia and Montenegro liked landscape the best (58%),



	<p>hospitality and friendliness (26%), cultural events (24%), tradition and history (23%), national cuisine (20%) and nightlife (19%).</p> <ul style="list-style-type: none">✓ Most expatriates arranged their accommodation themselves with (53%) or without (18%) previous reservation. Using tourist agencies: 28%✓ 32% of expatriates stayed in Serbia and Montenegro tourist resorts for more than seven days, 23% for five to seven days, 26% for three to four days and 19% from one to two days✓ expatriates used bed and breakfast (34%) and full-board services (32%)✓ expatriates spent most of their spare time swimming, sun-bathing, walking (30%), sightseeing (30%), in restaurants and night-clubs (23%) <p>International guests staying at the coast for summer holiday and are prone to visit B&K region</p> <ul style="list-style-type: none">✓ The most frequent reasons for visiting Montenegro are leisure, vacation, recreation (65%), business reasons (13%) and visiting friends and relatives (12%)✓ When questioned on what they liked best in Montenegro, foreign tourists rated the beauty of the landscape first (90%), then hospitality and friendliness (35%), tradition and history (24%), food (26%), the "night-life" (22%), cultural events (13%)...✓ International guests expect a very high standard of cleanliness (environmental standards, hotels, etc.)✓ 96 % of all tourists would be happy to visit Montenegro again for a holiday <p>International tourist with family and/or roots in Montenegro</p> <ul style="list-style-type: none">✓ migrants from Montenegro (workforces) will tend to visit the country of their origin during their holidays.✓ These Montenegrin tourists on a home visit mostly come from BENELUX, Germany, France <p>European special interest market, eg. associations for hiking</p> <ul style="list-style-type: none">✓ The reasons for hiking in Montenegro are to see some really untouched nature✓ Nature lovers expect to have encounters with wild life✓ The expectations are high for cleanliness (environmental standards, hotels, etc.), security (aid in case of accidents), signboarding and clear information about hiking offer✓ Offers for evening entertainment are expected✓ Guides tours, local products, and public transport are expected to be available✓ Basic knowledge of English can be expected
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7 Target groups of the future

The following target groups have been discussed and defined jointly by the stakeholders of B&K region.

The main interest and expectations of the target groups according to activities and special interests are given in a brief overview:

7.1 Summer

Target group	Main interests and expectations
Main target groups	
National park visitors 1 main purpose of trip is to visit National Park	<ul style="list-style-type: none">✓ Is interested in untouched nature and wild life✓ Has already seen many NP – compares offer and facilities✓ excellent information material (multilingual, about natural features, plants, etc.) needed✓ demand for rangers with detailed knowledge of the NP and with language as well as pedagogic skills✓ visits thematic trails, nature trails✓ needs accommodation close to entry✓ books packages offered combining more National Parks in Montenegro✓ will buy souvenirs to take home (eg book about NP)✓ requests regulations for the use of the protected area (no off-road vehicles allowed, no youngsters partying at the lake, no fires) <p>Main source market:</p> <ul style="list-style-type: none">◆ national and international nature lovers and also scientific visitors◆ international tourist on a coastal holiday in CG
National park visitors 2 passing on the road to the coast or back, has an incidental rest in the National Park	<ul style="list-style-type: none">✓ need large information signboards outside the NP✓ Wants to stretch the legs after a long ride✓ Needs refreshments, toilets✓ Likes short walk ways with interesting features✓ Needs space for kids to roam✓ Wants little regulations for the use of the protected area (off-road vehicles should be allowed, swimming in lakes, might light fires)



	<p>Main source market:</p> <ul style="list-style-type: none"> ♦ Serbian tourist on a coastal holiday in CG ♦ International expatriates on the thoroughfare
Hikers	<ul style="list-style-type: none"> ✓ request renowned hiking region and trails ✓ need good signboards ✓ will need, even buy excellent map ✓ prefer huts for overnight stays ✓ love mountain pastures with traditional small farms (ca-tuns) ✓ public transport to the start and at the end of the trail is helpful ✓ reliable weather forecast should be available on request ✓ might need shops to buy or hire hiking equipment <p>Main source market:</p> <ul style="list-style-type: none"> ♦ Montenegrin and Serbian hikers ♦ international hiking associations and individual hiking ex-perts
Montenegrins on leisure visits from Podgorica and coast	<ul style="list-style-type: none"> ✓ Wants to visit relatives in B&K ✓ Will stay for the weekend or longer ✓ Likes a good choice of restaurants and bars ✓ Will enjoy a »corso« in the evening with nice cafe-bars ✓ Would try »adrenalin« activities (rafting) ✓ Enjoys easy walks with no special gear required ✓
International vacationer staying at the coast	<ul style="list-style-type: none"> ✓ Wants a break from the hot and crowded coastal resorts ✓ Will book packages »Rafting trip and 3 NP in 3 days« ✓ Can be attracted by highlights (e.g. access road from Podgorica with sights and stops) ✓ Needs to be entertained: program of activities (sports, evening events) ✓ Needs hotels and gastronomy with high quality ✓ Will request good shopping facilities ✓ Expects English speaking staff ✓ ✓
Young active	<ul style="list-style-type: none"> ✓ is interested in rafting and canyoning tours ✓ would try new »adrenalin« activities ✓ request good standard of accommodation ✓ would try mountain bike trails ✓ needs equipment for hire ✓ would use public transport



	<ul style="list-style-type: none"> ✓ wants to be in contact with relevant local experts for the sport in question ✓ wants to chill out in a cool bar ✓ can be a single or couple without kids or a group of friends <p>Main source market:</p> <ul style="list-style-type: none"> ◆ Montenegro and Serbia ◆ expatriates
Other target groups are	
health seeking people (wellbeing in the mountains)	<p>Need to recover in the mountains, would ask for:</p> <ul style="list-style-type: none"> ✓ Easy walking trails ✓ Areas with little traffic ✓ Wellness infrastructure (spa, sauna, etc.) ✓ Doctors available for check-ups ✓ ✓ <p>Main source market:</p> <ul style="list-style-type: none"> ◆ Montenegro and Serbia
Fischermen	<p>Need excellent water quality, would ask for:</p> <ul style="list-style-type: none"> ✓ Very clean river beds and waters ✓ Parking close to river beds ✓ High quality accommodation ✓ <p>Main source market:</p> <ul style="list-style-type: none"> ◆ International markets
Company incentives	<ul style="list-style-type: none"> ✓ need tailor-made solutions for special requests, no standard-offers but creativity ✓ focus on »adrenalin« activities ✓ high standards of accommodations ✓ evening events ✓ ✓ <p>Main source market:</p> <ul style="list-style-type: none"> ◆ Montenegro and Serbia
Professional sport club (basket ball team, etc.)	<ul style="list-style-type: none"> ✓ Need healthy environment to build up shape ✓ Training facilities – indoor and outdoor ✓ Need running courses with no vicious dogs ✓ ✓



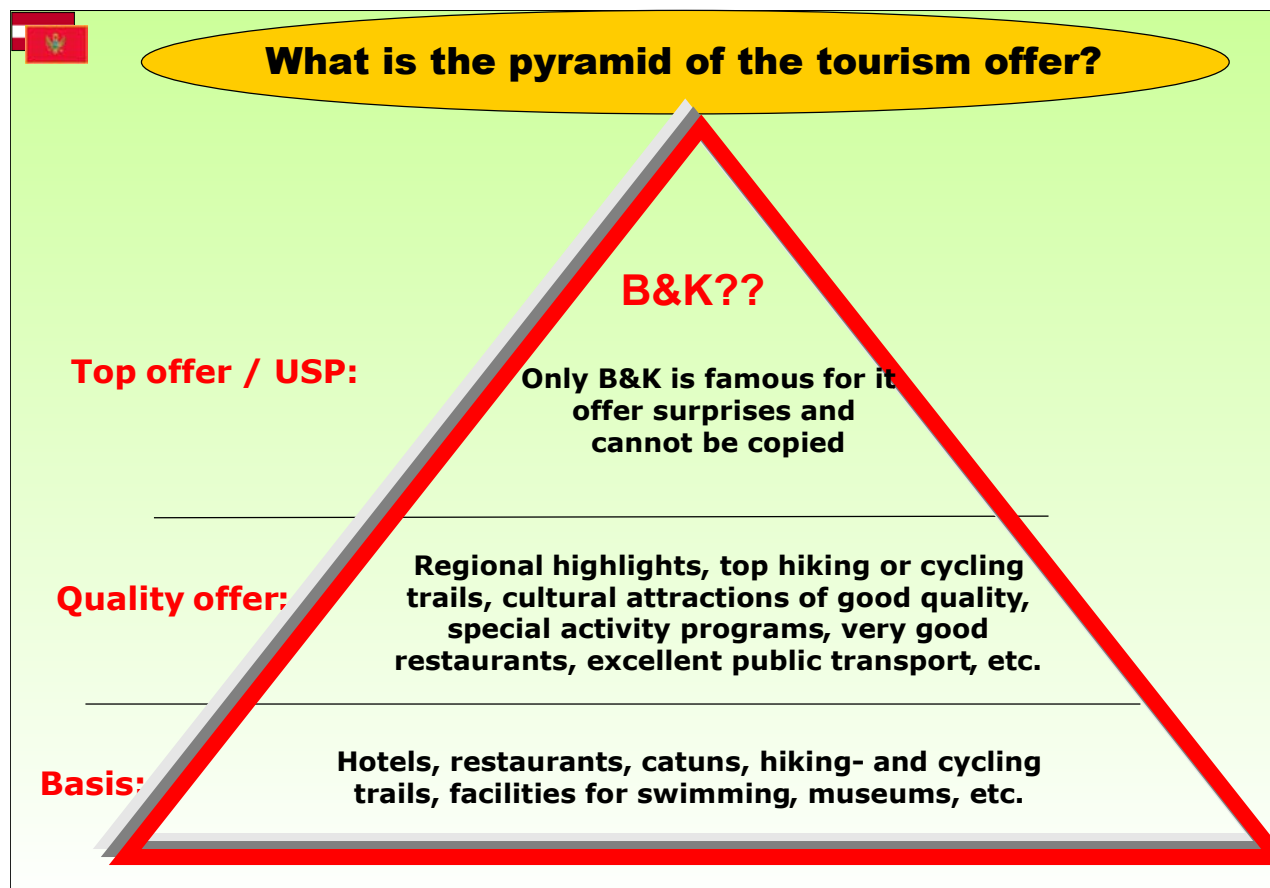
	Main source market: ♦ Montenegro and Serbia
families with kids, elderly (aged 50+)	✓ safe and well-equipped play grounds ✓ gastronomy with play ground ✓ safe and easy walk ways ✓ well signboarded attractions ✓
scientific visitors, university groups, school groups	✓ indoor information (NP laboratory) ✓ possibility to work (internet facilities, laptops) ✓ specific packages for specific scientific interests (speleology, ornithology, etc.) ✓ wants to be in contact with local experts and professionals ✓
volunteer tourists	✓ Organised programs ✓ Fringe benefits (entertainment, fun, events for youngsters and students) ✓

7.2 Winter

Target group	Main interests and expectations
Main target group	
Skiers	✓ Quick accessibility of skiing resort ✓ Needs lifts with good standards ✓ Wants possibilities to hire gear ✓ Want well prepared slopes as well as back-country slopes ✓ Likes restaurants and cafés close to lift and slopes ✓ Searches for evening entertainment ✓ Requests Nordic skiing facilities (tracks and gear for hire) ✓ Might need ski instructors Main source markets: ♦ Montenegro, Serbia ♦ Albania ♦ Some expatriates

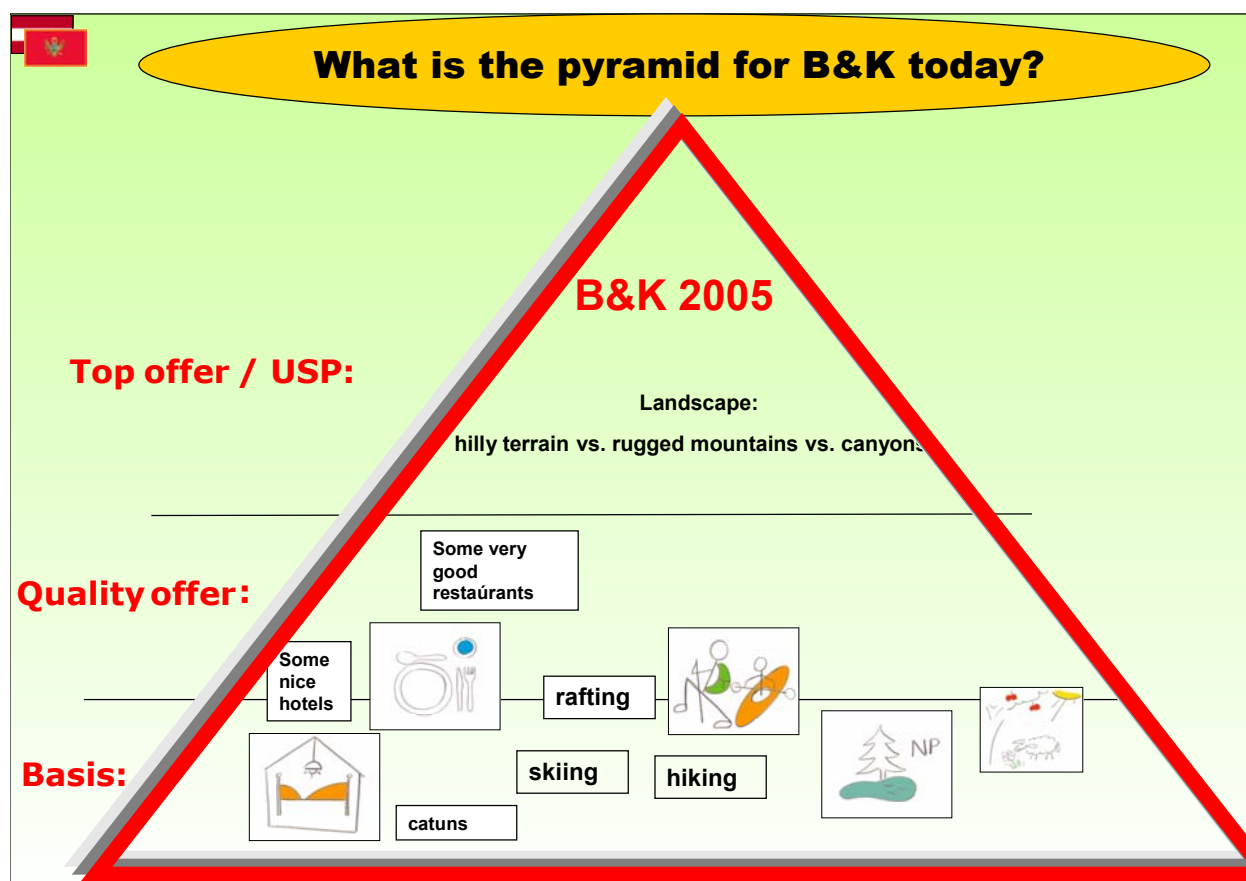
8 Pyramid of the tourism offer

The pyramid shows which offers should be provided in a tourism region, rated in a basic offer, a quality offer and the top offer:



8.1 The status quo

The status quo of the offer in B&Kregion is shown in the following graph:



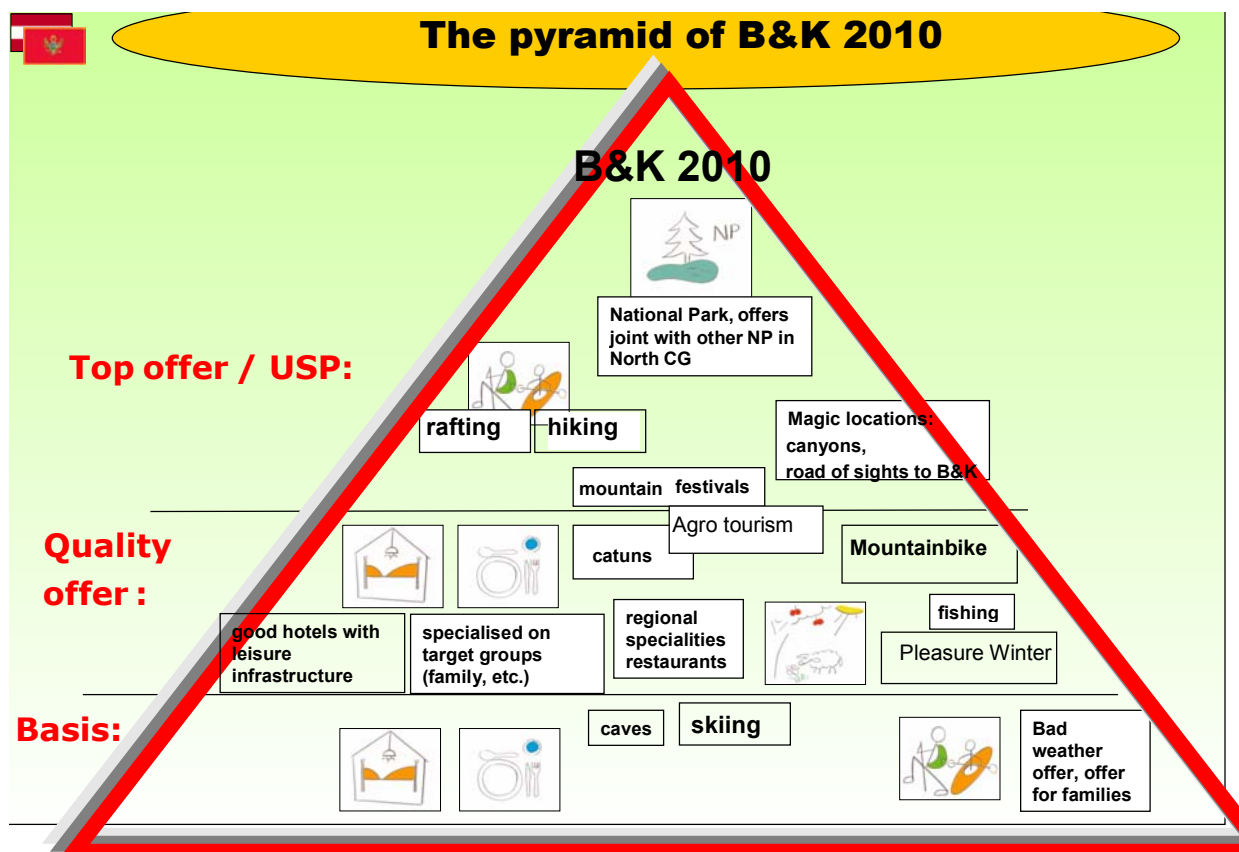
Most of the offer is rated as basic or even below basic standards. Strong efforts have to be undertaken to bring the existing offer to a good basic standard - and to develop some really good quality offers!

A small niche of these quality offers is already available today to a certain extent: some nice hotels, some very good regional restaurants and the rafting offer can be rated as a quality offer in tourism

On the top of the pyramid is the really outstanding offer. At the moment, the landscape itself with the hilly terrain and the rugged mountains versus the canyons and valleys has the largest potential for future development.

8.2 The future – a strong top offer

The future offer in B&K region could develop a strong top offer:



Focus for the **TOP OFFER** in B&K mountains is on developing summer tourism:

The strong top offer of B&K mountains is based on its natural potentials found in the **National Park Biogradska Gora** developed into an attractive and profiled tourism offers. Offers focusing on sustainable development of tourism and especially products jointly elaborated with the **other National Parks of Montenegro** have a realistic future potential.

The largest market potential for activities is primarily given for **hiking** and **rafting**. Also here a profiled, interesting and uncomparable offer has to be developed and marketed.

Mountain festivals can be the way to bring the offer from the producer to the interested costumer: regional traditions as well as products can be put „on stage“ in the course of these mountain festivals.



A very special highlight are the **canyons** of B&K mountains. For example the road from Podgorica to B&K mountains with its awe-inspiring views and the spectacular gorge is already worth while the visit.

Furthermore, an excellent **QUALITY OFFER has to be developed in the fields of:**

- Accommodation, Gastronomy
- Agro Tourism (regional specialities, eco-catuns, etc.)
- Programs for families
- Mountainbiking
- Fishing
- Pleasure winter (Nordic skiing, soft winter activities: snow hiking, programs for „snow and fun for kids“, etc.)

On the **BASIS initiatives to improve the offer**

for accommodation and gastronomy will be started. Also a basic offer for bad weather activities has to be developed in the near future.

A small but distinct potential is seen in caving/speleology: The existing caves could be opened up for visitors – but of course should be protected sites as well and carefully developed!

WINTER OFFER

Theoretically, there is of course also a large potential for developing the **winter offer** with skiing infrastructures (snow cover up to 120 days, interest of local stakeholders to focus on winter tourism). Obstacles are the very high infrastructure investments needed, and also the running cost of ski centers are often underestimated. The local market potential for running a large ski center economically successfully is not given. Furthermore the unhindered build-up of skilifts in B&K Mountains (the USP is National Park!) does not fit into the strategic objective to develop a sustainable tourism offer.

9 Vision for tourism development in B&K

9.1 Leading principle: Sustainable tourism

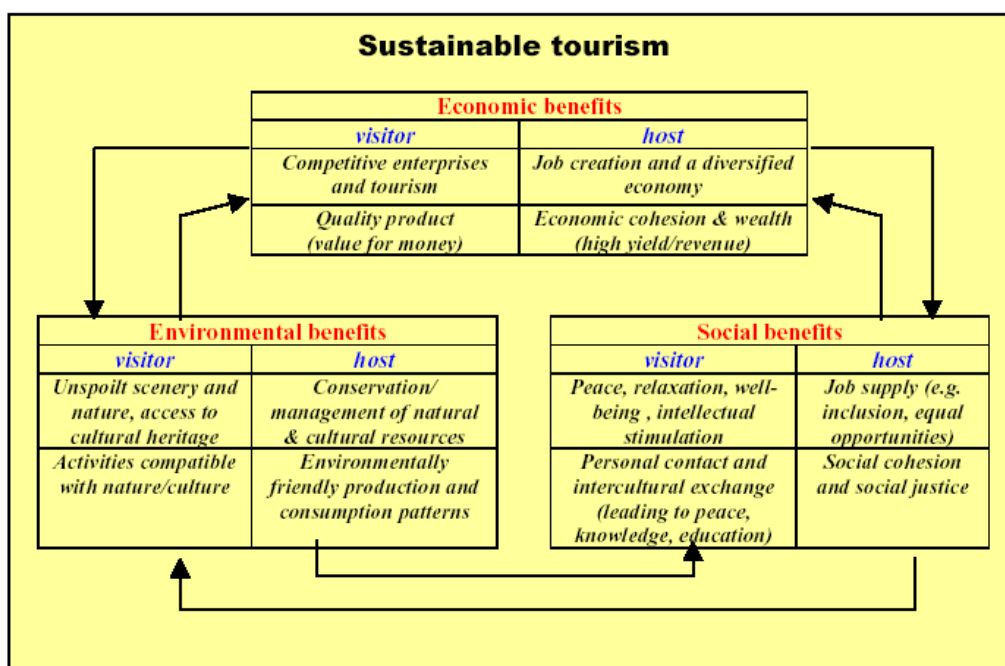
The leading principle for the future tourism offer in B&K mountains is the development of sustainable tourism.

Sustainable tourism is defined by the World Tourism Organisation WTO:

"Sustainable tourism development meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems."

All tourism activities in B&K mountains should fit into this definition irrespective of which market segments they target. This is especially important for tourism based on nature and cultural heritage where the risk of damaging the environment and the socio-economic fabric is potentially higher.

Moreover, as tourism volume is expected to increase over the next decades there will inevitably be more pressure on these resources. It is therefore not enough to limit damages, there will also have to be some tangible benefits for the area in question: economically, environmentally and socially.



Source: WTO 2002, Adapted from *Tourism and the Environment in Europe* 1995

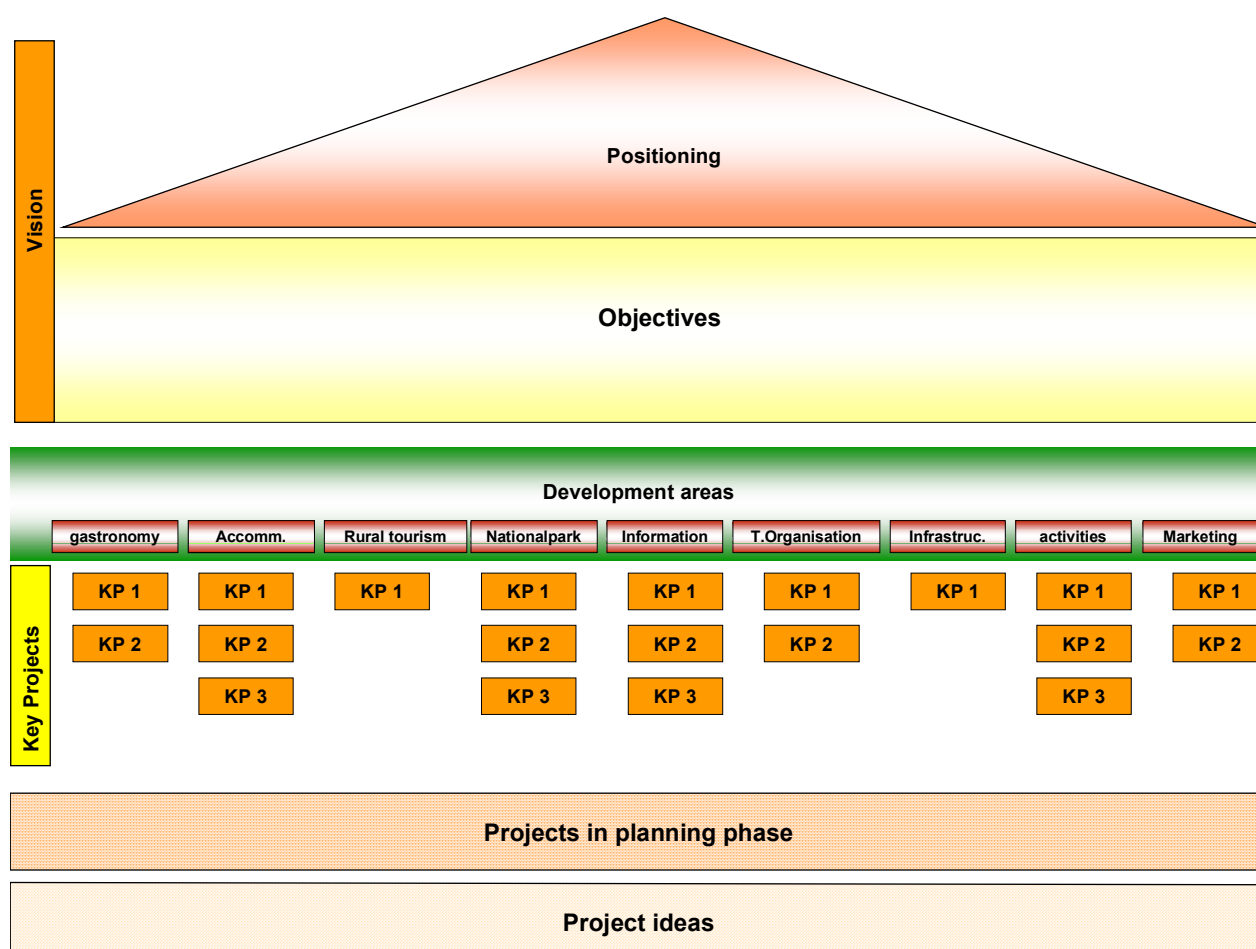
9.2 The concept of the encompassing vision

The tourism **vision** is made up of the future **positioning** with a clear formulation of the **objectives** for the future.

This vision can only be made real when focussing on the relevant **development areas**. Here, development objectives are set for each area.

Those development objectives can only be reached with the implementation of „**Key projects**“.

Other projects not yet close to implementation are listed as „**projects in planning phase**“. Also **projects ideas** (which are not mature yet) are listed in the encompassing picture:





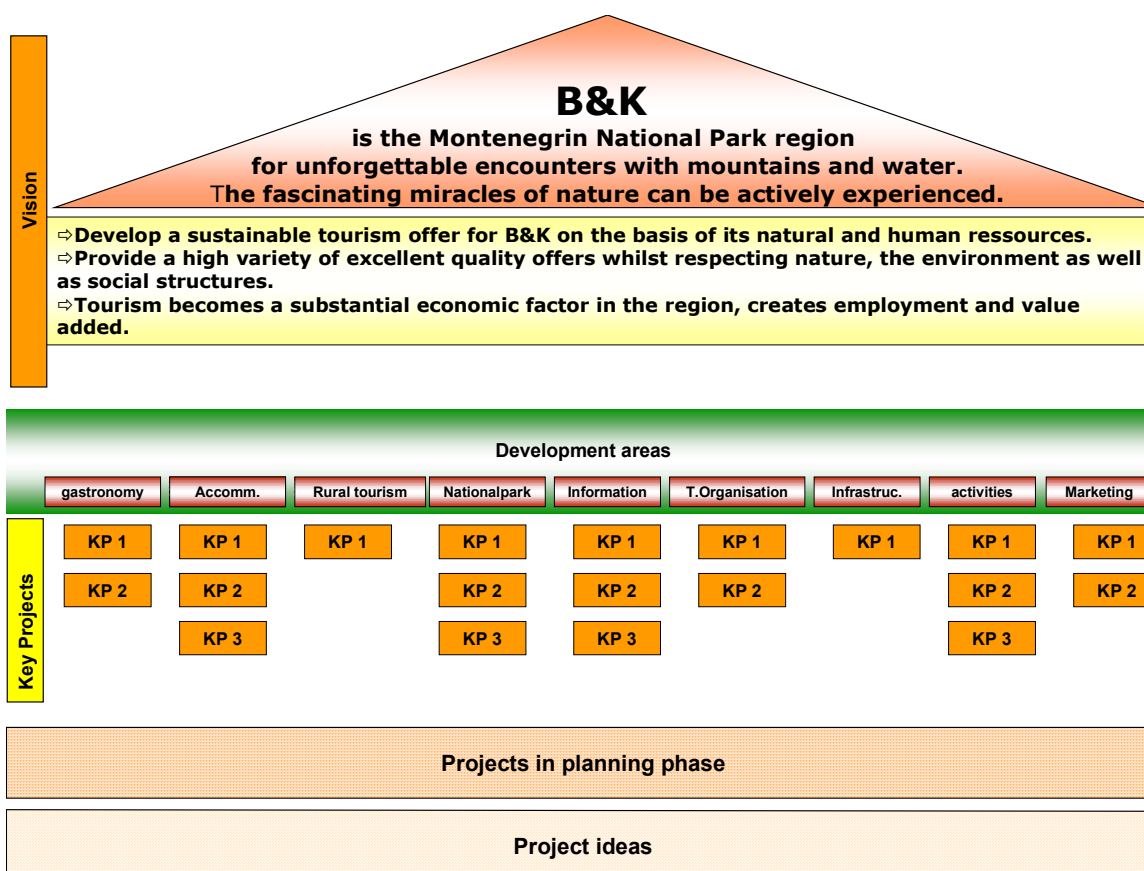
9.3 The Vision

B&K
is the Montenegrin National Park region
for unforgettable encounters with mountains and water.
The fascinating miracles of nature can be actively experienced.

Objectives:

- ⇒ Develop a sustainable tourism offer for B&K on the basis of its natural and human resources.
- ⇒ Provide a high variety of excellent quality offers whilst respecting nature, the environment as well as social structures.
- ⇒ Tourism becomes a substantial economic factor in the region, creates employment and value added.

The encompassing development strategy:



10 Sectoral objectives and project ideas

The development objectives per sector have been formulated by the members of thematic working groups supported by the consulting experts. These development objectives are the basis for future project proposals which have been collected as “project ideas”.

Important:

Some of the project ideas have been clustered thematically where appropriate. No project ideas have been censured so far.

It has to be noticed that many of these project ideas are just desires and requests of the participants of the work groups. All proposals need to be checked and further developed in order to achieve project maturity.

All project proposals which are already defined as “KEY PROJECTS” are described briefly in the next chapter.



Gastronomy

Objective: Promote regional products and specialities in the gastronomy

Potential development projects

- **“Qualification initiative for regional and traditional dishes in gastronomy”**
 - (Recipe book / collection of traditional recipes and products (with photos how to present food in stylish ways)
 - Qualification initiative for regional and traditional dishes in gastronomy
 - Initiative for adapting traditional recipes for modern consumption habits
 - Improve local dishes (prepare deserts also with local products, current nutrition adaptation of traditional products, ...)
- Improve the presentation of regional dishes (garnish of food)
- Promotion of traditional regional and ecological food in the gastronomy
- Development of new regional specialities (different areas: desserts, soups, drinks, vegetarian dishes,)

- ❑ Promote the registration of national restaurants in municipalities with NTO
- ❑ Promote and assist international menu cards, several languages
- ❑ Language courses for staff in restaurants (+ 50 useful phrases for hotels and restaurants (both for staff and for guests))



Accommodation

Objective: extend capacity and improve quality of accommodation

Potential development projects:

extend capacity

- ❑ Initiative to register officially all accommodation facilities (make registration compulsory, reduce obstacles and provide also incentives), transparency of accommodation offer, awareness raising
- ❑ Affordable credit and incentive system for infrastructure development (new accommodation capacity, improvement of quality, creation of leisure offer in hotels, ...)
- ❑ Development and/or improvement of mountain huts providing lodging, shelter and basic gastronomy in the mountains

Improve quality

infrastructure

- ❑ Incentives for construction and renovation of bathrooms
- ❑ Support and incentives for installation and development of leisure facilities in hotels and pensions (sauna, children play grounds, swimming pool, ...)
- ❑ Ecological heating for mountain hut (eg Dzambas)
- ❑ Development and implementation of a regional sign posts system for accommodation

qualification

- ❑ Foreign language courses for staff / management in tourism industry
- ❑ Seminars about National Park and tourism highlights for staff of accommodation and gastronomy
- ❑ Voucher book / training programme for tourism staff about National Park and tourism attractions in the region



Rural Tourism and agricultur

Objective: Integrate farmers and farm products actively in the tourism offer of B&K mountains

Potential development projects

widen the product range

- ❑ Development of regional food souvenirs (special packed ham, cheese, pepper cake, teas, herbs, marmelade, mushrooms, ...), handcrafts and music instruments and special merchandising
- ❑ Branding: Promotion of collection and cultivation of regional products (Teas, herbs, mushrooms ...)

improve promotion and the access to the market

- ❑ survey local agricultural products: who produces what, who could participate in merchandising,...→ produce a brochure for regional agricultural products
- ❑ Opening of a type of local green markets for sale of home-made products
- ❑ Organise outlets to sell local products both to regional tourism enterprises, local people and tourists (in tourism offices, special designed niche in hotels and restaurants, ...)
- ❑ Festival / competition for regional specialities (cheese, schnaps) with tasting and branding
- ❑ Days of katun, katun-festival
- ❑ set up a regional organisation for rural / village tourism

others

- ❑ save and renovate old traditional stone and wooden houses (entire ambiente, f.e. roofs with wooden tiles) for eco- and ethno-tourism
- ❑ Organize volunteer tourism initiatives in the region (to protect nature, construct infrastructure, help in the katuns, ...)
- ❑ Renovate and set up new katuns



National Park

Objective: Creation of an outstanding core offer of the B&K mountains by improving infrastructure, services and information to integrate the National Park into the orchestra of regional tourism

Potential development projects

Improvement of NP infrastructure

- ☐ construction of 3 observation towers
- ☐ repair and improvement of wooden bridges and observation platforms over the river delta
- ☐ Design of a thematic path (information boards, nature experience sites, ...)
- ☐ Setting-up a NP laboratory (well equipped in-door NP space for guided nature experience)
- ☐ Rehabilitation of the old fish nursery
- ☐ Construction and equipment of a NP visitor center (rehabilitation of the old guard house at the bridge or new center in Mojkovac)

Development of NP activities

- ☐ Training of NP guides (how to provide exciting edutainment to visitors of the NP)
- ☐ Development of NP visitor programmes for kids
- ☐ Co-operation NP and schools (obligatory visits of schools to NP)
- ☐ Summer courses for kids/students in the NP (collecting credits for your studies)

NP information

- ☐ Information campaign with local population and tourism enterprises
- ☐ NP Info package for hotels
- ☐ NP information package for schools



Information

Objective: improve transparency of the tourism offer and support visitors orientation in B&K Mountains

Potential development projects

regional information material

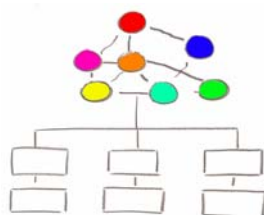
- ☐ **Regional Leisure Guide**
 - Regional information brochure
- ☐ Regional website (information focussed concept) including live web-cams, photo gallery, links to all relevant associations in the region
- ☐ Regional calender of events and festival
- ☐ Electronic map
- ☐ Produce regional information material
 - Info CD / DVD
 - Printed material
- ☐ Coupon book with regional sights
- ☐ Accommodation brochure, accommodation signposts

regional information and signposting system

- ☐ Regional tourism info center
- ☐ National Park visitor center
- ☐ Signposting for accommodation and restaurants
- ☐ Signposting for touristic attractions and touristic scenic locations
- ☐ Regional signboards and maps in town centers and at "hot spots"
- ☐ In-door regional information boards (to display regional and individual tourism information) for hotels and gastronomy

information services and activities

- ☐ Tourism ambassadors, tourism guides at hot spots and in city centers
- ☐ Free visit campaign to regional attractions for tourism staff
- ☐ Open door-day of accommodation (to show the local population the existing accommodation offer in the region)
- ☐ Awareness raising / information for local people about nature values, tourism assets
- ☐ Organise language courses



Tourism Organisation

Objective: regional co-ordination and co-operation in tourism relevant issues

Potential development projects

- ❑ **Setting-up a regional tourism organisation**
distinguish:
 - what should be resolved on local level and what does need a national approach
 - short term, medium term, long term focus
- ❑ Institutionalised internal and external networking and information exchange



Infrastructur

Objective: improve local infrastructure for tourism access

Potential development projects

- ❑ Access roads to Bjelasica
- ❑ Water and energy supply for catuns
- ❑ Infrastructure for special offer (cave, hiking, mountainbiking,...)
- ❑ Opening the Airport in Berane
- ❑ Cleaning riverbeds from car wrecks, clean-up of waste, recycle bins in municipalities



Activities

Objective: Development of new and improve existing offers for mountain experience in summer and winter

Potential development projects

Summer

Improvement of the **mountain hiking** offer

- ☐ Marking and signposting of hiking trails
- ☐ Restauration of damaged parts of hiking paths
- ☐ Outlining easy hiking paths for families and kids close to the municipalities
- ☐ Design of special interest (thematic) trails
- ☐ Up-date of the regional hiking map
- ☐ Agreement among hiking associations about maintainance responsibilities
- ☐ Construction of mountain huts and shelters
- ☐ Training of hiking guides
- ☐ Night hikes with torches or candles
- ☐ Create hiking trails (eg from Andrijevisa to Komovi, etc.)

Development of a **mountain biking** offer

- ☐ Marking and signposting of mountain biking trails
- ☐ Integration of the mountain biking trails into the regional hiking map
- ☐ Mountain bike race

Winter

- ☐ Development of a nordic winter offer
- ☐ Snow-shoe hiking (traditional production of snow shoes in BP)
- ☐ Building of Igloos – hot winter
- ☐ Ski lift (for Mojkovac, possibly only Baby lift, for Majstorovina)
- ☐ Visits to snowed in Katuns
- ☐ Motor sledges for winter tourism offer



Families

- ❑ Development of specific family offer in the region (at least collect the possibilities for them)
- ❑ Family programme for every day during the season in the region (also with bad weather element)
- ❑ Creation of interesting packages for families and companies (special interest packaging + information leaflets)

River and water experience

- ❑ Improvement and co-ordination of the **rafting offer** on Lim and Tara
 - Regional rafting and canyoning brochure
 - Improve the river access areas
 - Create a seasonal event
- ❑ Development of the regional **fishing** offer
 - Regional fishing leaflet (transparent information about all relevant aspects)
 - Assure satisfying quantities of typical local fish in rivers and lakes (fish nursery, ...)
 - Co-ordination among the various fishing associations and institutions
 - Support fishing association with equipment for tourists and for the protection of the rivers

Others

- ❑ Katun festival, thematic festivals
- ❑ Traditional festivals (film festival, sports, ...)
- ❑ Development of the cave (protect it against invasion, make feasibility study)
- ❑ Development of Taftanica cave)
- ❑ Grass mowing in Katuns, seath mowing competition
- ❑ Horse races
- ❑ Grass skiing
- ❑ Construction of access roads to the Bjelasica
- ❑ Development of a paragliding offer
- ❑ horse riding
- ❑ Promote the health offer (moderate temperature in summer, altitude favourable for Asthma healing and sport camps, wellness facilities, low season packages for elderly people) meet the communication needs → mountain wellbeing
- ❑ ski-village in the mountains
- ❑ Establish hunting tourism



Marketing

Objective: Joint professional promotion of B&K Mountains

Potential development projects

market research

- ☐ Guest surveys and guest census at "hot spots"
- ☐ Regional guest surveys in hotels

Marketing material

- ☐ Development of a regional brand and logo (CD/CI)
- ☐ Marketing strategy
- ☐ Regional photo archive
- ☐ Presentation about Bjelasica
- ☐ Marketing material

Marketing activities

- ☐ Involvement of local media
- ☐ Internal marketing
- ☐ Setting-up a "B&K tourism embassy" at the coast (outlet for tourism information and regional souvenirs)

Important:

This is the listing of project ideas. No project ideas have been censured so far.

It has to be noticed that many of these project ideas are just desires and requests of the participants of the work groups. All proposals need to be checked and further developed in order to achieve project maturity.



11 Brief description of key projects

11.1 National Park Biogradska Gora

The infrastructure and services in the National Park Biogradska Gora will be improved for tourism access. The measures already in implementation include:

- ☐ Set up bridge over the delta at lake Biogradska
- ☐ Install watchtowers for observations
- ☐ Build-up a fish hatchery
- ☐ Improve the infrastructure at the lake

Additionally, training courses for Rangers are being carried out.

Time frame:

The training course has started in May 2005. The applications for the Small Project Fund is planned for end of May 2005. The implementation is planned until August 2005.

11.2 Set-up of a B&K Tourism Organisation

The set-up of a regional tourism association has been defined as one of the core objectives of the project.

In order to develop this organisation it has to be defined:

- ☐ what are the competencies (what should be resolved on local level and what does need a national approach)
- ☐ which measures have short term, medium term, long term focus
- ☐ set-up of a budget line and financing tools
- ☐ How can internal and external networking and information exchange be institutionalised?

Time frame:

The work to set up the B&K Tourism Organisation will be one of the main tasks in the next months, starting in June 2005.

11.3 Develop CD/CI of B&K Mountains

The development of a regional label and logo (Corporate Design, Corporate Identity) is necessary to build up a regional brand. It creates not only external marketing value but also serves as a tool for internal, regional co-operation and awareness for regional co-operation.



Time frame:

The work to develop the B&K Corporate Design will be one of the main tasks of the to be established tourism organisation. Preparations to start the process will be initiated in September 2005.

11.4 Information Material

The production of excellent information material about B&K Mountains will be one of the most important projects of the newly established tourism organisation and should be implemented after the development of CD/CI.

Information material produced could include:

- ☐ **Regional Leisure Guide (already in print, May 2005)**
- ☐ Regional website (information focussed concept) including live web-cams, photo gallery, links to all relevant associations in the region
- ☐ Regional calendar of events and festival
- ☐ Electronic map (included in hiking-project)
- ☐ Produce regional information material (CD / DVD, printed material)
- ☐ Accommodation brochure, accommodation signposts

Time frame:

The detailed plans for the information campaign will be drawn up until October 2005. The implementation phase is foreseen for Autumn/Winter 2005/2006.

11.5 Quality for Gastronomy

The planned activities for improving the quality for gastronomy offers in the B&K mountains consist of a training program for staff comprising the following modules:

- ☐ Promotion of traditional regional and ecological food in the gastronomy
- ☐ Development of new regional specialities (different areas: desserts, soups, drinks, vegetarian dishes,)
- ☐ Improve the presentation of regional dishes (garnish of food)
- ☐ Preparation of international menu cards
- ☐ Language courses

Time frame:

The detailed plans for the quality initiative will be drawn up until September 2005. The implementation phase is foreseen for Autumn 2005.



11.6 Hiking

The planned activities for improving the hiking offers in the B&K mountains consist of

- ☐ Restauration of damaged parts of the main hiking paths of B&K mountains
- ☐ Marking and signposting of those hiking trails
- ☐ Signposting the starting points of those hiking trails
- ☐ GPS-map of these main tracks including training in handling of GPS-instruments
- ☐ Up-date of the regional hiking map
- ☐ Agreement among hiking associations about maintainance responsibilities
- ☐ Construction of mountain huts and shelters
- ☐ Training of hiking guides

Time frame:

The applications for the Small Project Fund is planned for end of May 2005. The implementation is planned until August 2005.

11.7 Pleasure Winter

The planned activities for improving the „soft“ winter offers in the B&K mountains consist of

- ☐ build-up an offer for Nordic skiing (1 – 3 cross-country tracks per municipality, sign-boarding, etc.)
- ☐ integrate soft winter activities into the skiing offer

Time frame:

The project idea “Pleasure Winter” has not yet been elaborated in detail. The first step will be to set up a working group in the region to define the clear objectives of this proposal. The next step will be to carry out a detailed feasibility study to find out about infrastructural needs and potentials. A strong co-operation with other nations experienced in Nordic Skiing (eg. Norway) could be sought.



12 Participants of workshops

The following persons were actively participating in the thematic workgroups from September 2004 until May 2005.

First Name	Surname	Position
Bijelo Polje		
Rizo	Kasumovic	Municipality Bijelo Polje
Blazo	Vlaovic	RBC- Regionalni Biznis Centar Bijelo Polje
Tanja	Krgusic	RBC- Regionalni Biznis Centar Bijelo Polje
Mensura	Nuhodžić	RBC- Regionalni Biznis Centar Bijelo Polje
Rifat	Alihodžić	Architect
Petar	Novovic	Pestan komerc
Pavle	Orović	Eko Katun
Zoran	Konatar	Mjekara
Branko	Hajdukovic	Biciklisticki savez SCG
Milisav	Scekic	NGO Bjelasica
Rifat	Kajabegovic	Association of ecologist
Milos	Furtula	RBC- Regionalni Biznis Centar Bijelo Polje
Ratko	Nisavic	SO Bijelo Polje
Ivo	Andric	NGO Bjelasica
Vuksan	Nisavic	NGO Bjelasica
Milos	Vlaovic	NGO Bjelasica
Ugljesa	Prebiracevic	Agrobisnis and rural tourism
Spaho	Ljuca	Eological association-BP
Pavicevic	Obrad	
Dragomir	Sebek	
Drago	Tomovic	
Milija	Pavicevic	
Milorad	Rmondic	
Kolasin		
Darko	Brajković	National Park Biogradska Gora
Danijel	Vincek	Botanischer Garten
Darko	Bulatović	Hotel Vila Jelka
Pradrag Cile	Bulatović	Hotel Cile
Dijana	Milosevic	Municipality Kolasin
Vanja	Krgovic	National Park Biogradska Gora
Panto	Pekovic	Municipality Kolasin
Veselin	Vukic	Municipality Kolasin
Zeljko	Rajkovic	Ski Centar Bjelasica
Milan	Djukic	Geography profesor
Luka	Bulatović	Eco-tours, NGO Grant
Gavrilo	Rakocevic	Profesor-touristic schol
Novak	Vuksanovic	NGO Natura
Milan	Scepanovic	Restoran-Savardak
Aleksandar	Popovic	PD Bjelasica



Radojka	Bazovic	
Milotije	Bulatović	PD Bjelasica
Vlatko	Bulatović	PSD Komovi
Mojkovac		
Vojislav	Radović	Municipality of Mojkovac
Zeljko	Pantovic	"Natura" Travel Agency Mojcovac
Olivera	Rakocevic	
Vukic	Fustic	NGO "BRSKOVO
Milorad	Krtolica	NGO "DUŠAN BULATOVIĆ- DŽAMBAS"
Gile-Dragomir	Mrdjovic	Eko Tours
Vlatko	Rakocevic	PSD Dzambas, NVO Planinar
Rade	Vidakovic	Lovacko Drustvo
Ljubomir	Vukadinovic	Referent za sport
Sanja	Cetkovic	Municipality Mojkovac
Dalbor	Fustic	NGO "BRSKOVO
Vukman-Mico	Zejak	Predsjednik udruzenja poslodavaca, Restorran Premija
Ilija	Popovic	Magistrala AD, Autobuska stanica
Stevan	Grdinic	NVO Planinar
Zoran	Dulovic	UTP -Sinjavina
Savo	Jovanovic	Hotel-Mojkovac
Zoran	Asanin	Motel Krstac
Miodrag	Barac	Fishing association
Bratislav	Radovic	Friend of Bjelasica
Vuceta	Rakocevic	Hunting association
Andrijevisa		
Veselin	Bakić	Municipality Andrijevisa
Goran	Djurisić	Municipality Andrijevisa
Stojan	Mimovic	Lovacko Drustvo
Radovan	Djekovic	Planinarsko Drustvo Komovi
Radeta	Pantovic	Municipality Andrijevisa
Dragica	Filipovic	Public economy
Vukic	Rajko	MZ Slatina
Milan	Radojicic	Fishing association
Miodrag	Novovic	Municipality Andrijevisa
Radisav	Vukic	Fishing association
Radmila	Ivanovic	
Berane		
Vlatko	Peković	Municipality Berane
Danko	Orović	Municipality Berane
Dragomir	Kicovic	
Zoran	Raicevic	Jelovica- Izvidjaci
Zeljko	Obadovic	Sportsko Ribolovno Drustvo Lim
Ugljesa	Vulic	PSD Vojo Maslovacic
Milija	Pajkovic	for mountain biking
Djoko	Rakovic	NP Biogradska Gora - Berane
Milonja	Vucelic	Touristic school
Nebojsa	Stesevic	SUR Gurman



Jelica	Pesic	Restaurant Dva Jelena, member of NTO for cuisine
Olomir	Scekic	Speleology association
Goran	Soskic	Restaurant Etna
Milan	Babovic	Mini ski lift
Zvezdan	Pesic	Restaurant Dva Jelena
Ivan	Popovic	Mountain association Vojo Maslovaric
Dragan	Mitrovic	Touristic organisation Berane



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