

project MedMPAnet

ECOTOURISM FOR LOCAL DEVELOPMENT IN BOKA KOTORSKA (MONTENEGRO)

FEASIBILITY STUDY

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FEASIBILITY STUDY

CAMP MONTENEGRO -
INTEGRATED COASTAL ZONE
MANAGEMENT STRATEGY FOR MONTENEGRO

MedMPAnet project

Regional Project for the Development of a
Mediterranean Marine and Coastal Protected
Areas (MPAs) Network through the boosting
of MPA creation and management

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FOREWORD

The present document has been elaborated within the framework of the Regional Project for the Development of a Mediterranean Marine and Coastal Protected Areas (MPAs) Network through the boosting of MPAs Creation and Management “MedMPAnet Project”, which is part of the MedPartnership GEF full size project “Strategic Partnership for the Mediterranean Sea Large Ecosystem” led by UNEP. The MedMPAnet Project is implemented by the Regional Activity Centre for Specially Protected Areas (UNEP/MAP-RAC/SPA) with financial support of the European Commission (EC), the Spanish Agency for

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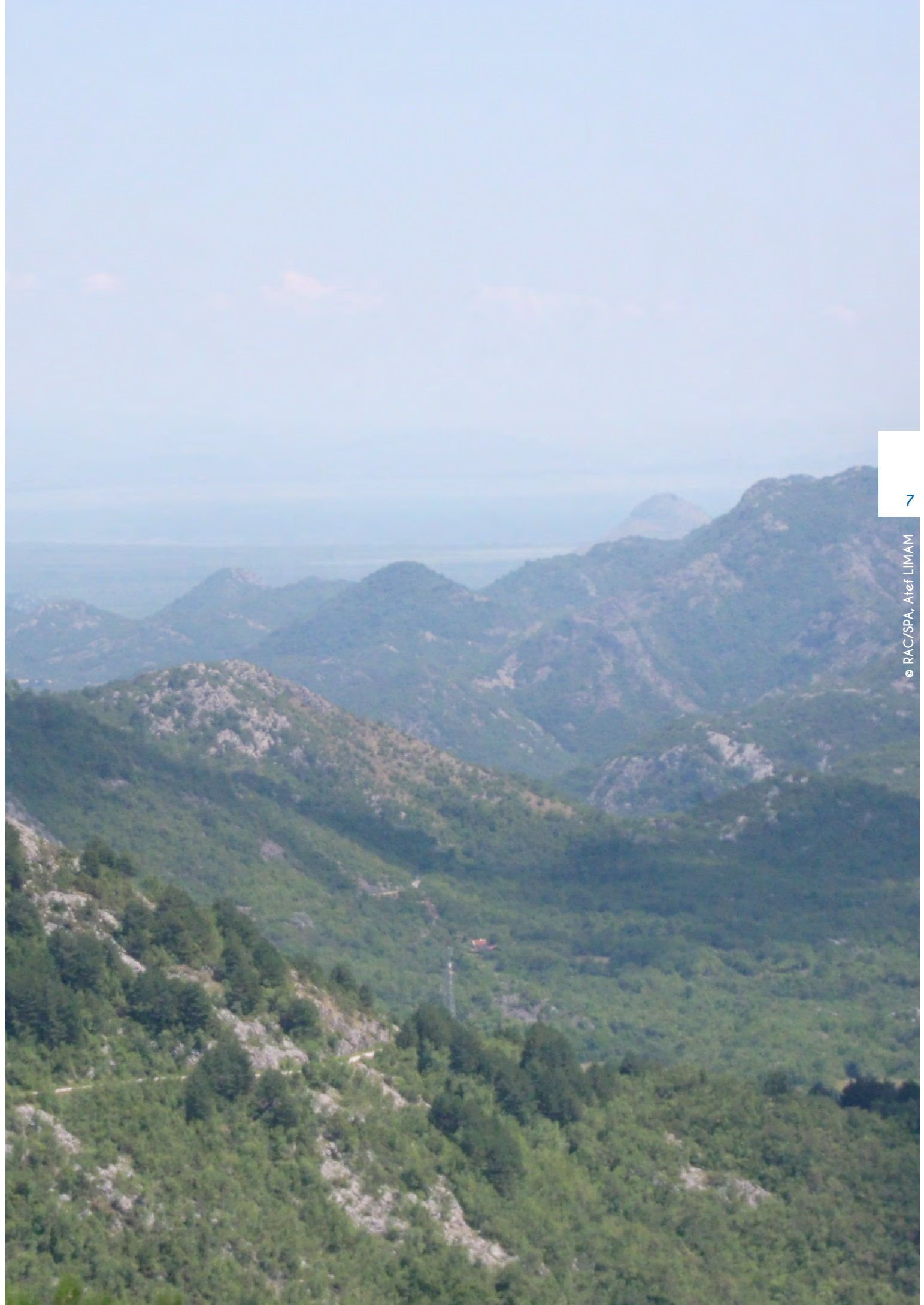
The document has been prepared based on a joint collaboration between The Regional Activity Centre for Specially Protected Areas (RAC/SPA) and The Regional Activity Centre for Sustainable Consumption and Production (SCP/RAC) aiming at assisting Montenegro in implementing ecotourism in Boka Kotorska in order to enable integrated coastal zone management (IZCM) of the coastal area of Montenegro.



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EXECUTIVE SUMMARY

Boka Kotorska is one of the most renowned stretches of the Montenegrin coast, part of which has been designated as UNESCO's World Heritage Site. The area hosts a rich biodiversity, expressed in a huge variety of landscapes, from the bay itself to the mountains that surround it. With a population of roughly 60.000 inhabitants, Boka Kotorska receives more than 300.000 visits a year, which provide almost 24 M€ revenue each year. Thus, tourism is one of the main industries in the region; however, it is also one of the main causes of its environmental stress, especially in the coastal and marine ecosystem.

Why a feasibility study on ecotourism in Boka Kotorska?

Ecotourism is a desirable economic activity that can help achieving the delicate balance between economic activity and nature conservation thus contributing to the desired general sustainability of the coastal area of Montenegro. However, the development of ecotourism needs certain conditions, in terms of economic, environmental and social requirements. It is necessary to assess the potential for ecotourism in the region, and study the tentative steps that can be taken to begin the process of ecotourism development.

This study analyses the sector of tourism and ecotourism in Boka Kotorska and assesses the potential of ecotourism entrepreneurship and businesses in Kotor. The study comes up with recommendations on the implementation of ecotourism in Boka Kotorska in order to enable integrated coastal zone management (IZCM) of the coastal area of Montenegro. The present feasibility

study is intended to provide independent and objective information to the relevant stakeholders, useful to decide whether an ecotourism scheme would be an economically, socio-culturally and environmentally viable hypothesis of development.

Boka Kotorska presents significant potential to become an ecotouristic destination, but is not free of threats

Boka Kotorska has a significant potential to become a new kind of destination focused on nature, culture, conservation and agriculture rather than just sun and sand. Large rural areas with small villages and churches provide the great opportunity for environmental enthusiasts to enjoy hiking through untouched environmental scenery. In addition, promoting culture and nature-based activities and services of ecotourism in Boka Kotorska can help promoting sustainable tourism, the creation of economic opportunities for local communities and above all, a balance between local development and sustainability.

Despite that, the fast degradation of landscape and natural resources and the abandonment of hinterland require a rapid and forceful response. Namely, scarce infrastructure to observe nature, limited skills of local entrepreneurs and low level of involvement and participation of stakeholders in networking among others, are some of the challenges to be faced for a successful future of the sector.

A description of feasibility by key issues is detailed in Table 1:

Table 1. Feasibility assessment of Ecotourism in Boka Kotorska (BK)

KEY ISSUES FOR ECOTOURISM IMPLEMENTATION	FEASIBILITY ASSESSMENT: <i>Strengths & Opportunities vs Weaknesses & Threats</i>	
Conventional tourism	<ul style="list-style-type: none"> BK presents a well-developed tourism sector and the conditions to become a top Mediterranean destination all year round. Mass tourism and foreign investments if reoriented can be an opportunity for ecotourism. The accession process of Montenegro in the EU may help reinforcing the EU market of tourists. 	😊
	<ul style="list-style-type: none"> Some deficits in the tourism infrastructure have been identified. Massive touristic flux may pose environmental challenges to the region. External threats (climate change, competitors, cost of fuels, etc.) can determine the future of tourism in the region in the mid-long term. 	😞
Public tourism strategies, land planning and laws	<ul style="list-style-type: none"> Montenegro is the first declared Ecological State in Europe (1991). Montenegro has developed strategies for tourism development. The CAMP project (Integrated Coastal Zone Management) is an opportunity to boost ecotourism in Montenegro. 	😊
	<ul style="list-style-type: none"> There exists a risk of miss-planned management and lack of integration/coordination across different scales of planning. Land planning and management sometimes prioritise short-term and private benefits instead of ensuring public interest and long-term scope. There is a low level of citizen engagement and participation in public affairs. 	😞
Natural and cultural resources with touristic attraction	<ul style="list-style-type: none"> BK offers a good combination of sea and mountain attractions, jointly with the rest of Montenegro which also offer natural sites with ecotouristic attraction. The key ecotouristic attractions to boost ecotourism in BK are the link of cultural heritage under UNESCO protection, with landscapes, flora and fauna: protected areas, rural hinterland, and coastal/ sea bed habitats. Ecotourism can contribute to reduce pressure to the coastal habitats and to recover values in the hinterland. 	😊
	<ul style="list-style-type: none"> Environmental pollution and massive urbanisation is a major threat in the region and in some cases provoke irreversible habitat loss. Insufficient management of protected areas. There are lacks of knowledge and awareness regarding natural resources. Traditional rural settlements and communities are being lost. 	😞
Infrastructures, buildings and services for ecotourism	<ul style="list-style-type: none"> Montenegro has about 6,000 km of attractive routes thanks to the “Wilderness Hiking & Biking” project. There are several good examples of public facilities for wildlife watching to be promoted. Project of cable car Kotor-Lovćen-Cetinje can boost ecotourism in Lovćen Mountain National Park. 	😊
	<ul style="list-style-type: none"> There is no technical and financial support for the development of infrastructures, buildings and services for ecotourism so far. One of the biggest infrastructure deficiency for ecotourism are the interpretation signals. 	😞
Ecotourism supply/demand and complementary sectors	<ul style="list-style-type: none"> There is a growing International market for ecotourism. Northern Montenegro has already consolidated some ecotourism supply. Kotor could be a hub to connect different ecotouristic spots in Montenegro. Montenegro’s diversity is a key asset for the development of ecotourism entrepreneurship. 	😊
	<ul style="list-style-type: none"> There is a lack and misunderstanding of promotion of Ecotourism products. Complementary and specialized services, a necessary offer to be improved. Scarce available accommodation out of the summer season appropriate for ecotourists. Private stakeholders on ecotourism do not have sufficient investment capacity. 	😞
Stakeholder collaboration	<ul style="list-style-type: none"> Most stakeholders are ready for ecotourism, they only need to do the first step forward. Collaboration amongst stakeholders is on the epicentre of ecotourism promotion. Most of the stakeholders in Boka Kotorska already know each other. 	😊
	<ul style="list-style-type: none"> There is a low culture of networking and cooperation amongst stakeholders. No land stewardship initiatives have been identified in the region so far. Ecotourism is not fully understood by all stakeholders. 	😞

Sustainability of ecotourism is possible and desirable

To evaluate the sustainability of ecotourism in Boka Kotorska the four main sustainability principles of ecotourism have been considered, regarding the current

situation in Boka Kotorska, and for the next future in two scenarios (trends business-as-usual, and trends with ecotourism strategy). The purpose of this assessment is merely to have a qualitative vision of the challenges to be faced for the sustainability of ecotourism when implementing the sector. Table 2 shows the degree of sustainability of ecotourism today and for the next future:

Table 2. Sustainability assessment of ecotourism in Boka Kotorska: current assessment; trends Business-as-Usual; and trends with an adequate ecotourism strategy.

Sustainability principle	Degree of sustainability of ecotourism		Current situation	Trends Business-as-Usual	Trends with ecotourism strategy
Contributes to preserve natural and cultural diversity	High	Generation of economic resources directly reinvested in conservation actions of the natural area visited by ecotourists.			😊
	Medium	Contribution to conservation through several public strategies, NGO projects and research activities.	😐		
	Low	Low contribution to preserve natural and cultural diversity, more passive and indirect based only on some public policies and few stakeholders interested.		😞	
Contributes to improve economy and quality of life of local population and promotes the participation of small businesses and local entrepreneurs	High	Local businesses and entrepreneurs lead sector. It boosts other related local services (accommodation, restaurants, local food production, etc.) all year round.			😊
	Medium	Contracting services offered by foreign companies, but the execution of activities is performed partially by local ones. Moreover, the activity has little potential to generate economic activity through related services (peak season).	😐		
	Low	Sector is led by foreign companies, and all the complementary services are also controlled by foreign companies (extreme seasonality).		😞	
Minimising negative impacts on natural environment	High	Avoid mass activities. Preparation and development of the activities/services includes several measures to minimise environmental impact.			😊
	Medium	Activities can be massive in peak seasons. Preparation and development of the activities/services includes some environmental measures but are not sufficient.			
	Low	Activities are usually in big groups and generate agglomerations. Scarce measures to reduce environmental impact.	😞	😞	
Incorporates raising awareness and environmental education activities	High	Highly skilled professional guides that convey values and challenges of natural conservation. Ecotourists also receive high quality information (guides, brochures, etc.). Sometimes they also participate in conservation or research activities.			😊
	Medium	Ecotourists can be informed by some signposts on the field. If they are not, they can be informed with some general information about natural and cultural values and their challenges.	😐	😐	
	Low	Ecotourists do not receive any information or explanation about the values and challenges of the area. The only input about the context is the experience of the visit.			

Sustainability of ecotourism is possible and desirable because it refers to a sector that tends to avoid seasonality, with high growth tendency especially as a tool for differentiation and destination positioning on the international market. In addition, it is highly important for business and entrepreneurship development in local community, particularly in rural areas, where development options are limited in comparison to the urban agglomerations.

Recommendations for future development of ecotourism in boka kotorska

Boka Kotorska presents huge potential for ecotourism, but some conditions should be set before ecotourism could experience a real boost. Action should be taken following a general ecotourism strategy and action plan for Boka Kotorska and Montenegro. The following recommendations, structured in six main strategies, draw some rough lines of how this ecotourism strategy should be oriented. Some recommendations are short- and mid-term (meaning that they should be enforced during the next 1-3 years) and some others are expressed as long-term recommendations, to be executed after some other actions have been already put into practice.

1. The need for a multiscale & multisectoral strategy, planning & laws related to ecotourism

Short- and mid-term recommendations (1-3 years)

- Developing and applying a Strategic Action Plan of Ecotourism in Boka Kotorska or, from a wider point of view, a Strategic Action Plan of Sustainable Tourism, in accordance to (and updating if necessary) the Montenegro Tourism Development Strategy to 2020. This new plan should depend on baseline data of social and environmental factors, zoning strategies, regulations that can prevent deliberate abuse of fragile ecosystems, local participation in developing a set of standards for limits of acceptable change, and long-term monitoring.
- Implementing CAMP Montenegro and therefore consolidating ICZM as a unified and compact management system and management structure.
- Incorporating Strategic Environmental Assessment (SEA) with a cross-sectoral perspective in policy, plan and programme making, particularly in those new public instruments in topics related to ecotourism (land use, urbanisation, landscape, tourism, local and rural development, etc.).
- Controlling urban sprawl by preventing new construction sites, especially in the coastal area and in sensitive spots.
- Promoting public participation (information gathering, consultation) in the elaboration of new strategies and plans, through information technologies.

Long-term recommendations (>3 years)

- Developing rural policies and strategies to recover rural areas and villages and reduce pressure on the coastal region.
- Creating a properly managed eco-tax to promote ecotourism and sustainable tourism and to guarantee that ecotourism contributes directly to the conservation of protected areas.
- Promoting the use of sustainable means of transport, especially bicycles and collective transport (buses, taxis, car sharing...).
- Developing infrastructures such as new roads, water supply and sewage systems, energy, waste disposal, according to the needs of every location and prioritising the minimisation of environmental impacts.
- Supporting local products promotion, especially traditional ones (olive oil, wine, seafood).
- Creating specific regulations to offer legal basis for the eco-tourism service providers.

2. Sound management of the main ecotourism assets in the region

Short- and mid-term recommendations (1-3 years)

- Increasing economic resources available for the management of protected areas.
- Creating and financing stable management structures in Solila salt marsh and in new Orjen National Park, encouraging private engagement.
- Enforcing severe sanctions to the violation of laws and rules regarding nature and heritage conservation.
- Increasing knowledge and research on the natural and cultural values in the region through new monitoring programs.
- Evaluating properly the threats for natural and landscape values of all future investments and tourism projects in Boka Kotorska as a whole and from a strategic view.
- Evaluating properly the threats of the cable car between Kotor and Cetinje, and also the carrying capacity and new possible settlements.
- Regulating and limiting the access of cruise ships entering at the bay, especially in high season.
- Regulating access and frequency of visitors to certain vulnerable areas, according to scientific carrying capacity assessments.

Long-term recommendations (>3 years)

- Creating new protected areas in vulnerable regions such as Mount Vrmac or Luštica peninsula.
- Setting mechanisms that will be useful to guarantee that ecotourism contributes directly to the conservation of protected areas.

- Introducing the concept and promoting land stewardship within environmental programs and regulations, in order to engage landowners in the conservation of natural and cultural heritage.
- Considering biodiversity conservation and land stewardship as an approach that can help local businesses deliver or implement Corporate Eco Social Responsibility objectives

3. Support to ecotourism entrepreneurship

Short- and mid-term recommendations (1-3 years)

- Creating a database of entrepreneurs and ecotourism activities to better monitor ecotourism development and to offer best solutions to their needs.
- Creating a “help desk” to offer free of charge support to entrepreneurs and start-up enterprises related to ecotourism.
- Providing fiscal and legal support to ecotourism start-ups as part of a green economy strategy.
- Enhancing new public and private investments on ecotourism facilities and infrastructure to provide a basis for new ecotourism activities and products (e.g. creating a network of shelters and hides for wildlife observation).

Long-term recommendations (>3 years)

- Establishing mechanisms of institutional support to innovation in the tourism sector through grants, prizes and awards to innovation.
- Creating an ecotourism business incubator, offering financial support, fund raising, assessment and support by the National and Local governments and universities.

4. Capacity Building for ecotourism initiatives

Short- and mid-term recommendations (1-3 years)

- Developing specialised training workshops in environmental, business and language skills in order to increase private sector capacity and to ensure the quality of ecotourism products.
- Establishing mechanisms to share methodologies amongst ecotourism initiatives, based on trust and cooperation.
- Promoting international benchmarking on ecotourism and exchange programs.
- Creating training programs for tour guides in the rural areas to include the ecotourism approach into their services.

Long-term recommendations (>3 years)

- Integrating ecotourism in the tourism education and university offer.

- Developing specific University professional programs on ecotourism (masters or training courses).
- Elaborating online databases of available information and resources on environmental, social and economic issues, open to all stakeholders.
- Organising an expert group to monitor ecotourism activities and assess its quality.
- Promoting informative campaigns to explain ecotourism as a new line of business to the private agents that carry out tourist activities in Boka Kotorska.

5. Networking amongst stakeholders

Short- and mid-term recommendations (1-3 years)

- Promoting public/private partnerships and private networking and sharing of knowledge and information.
- Consolidating a database of ecotourism stakeholders, based on the sociogram included in this feasibility study.
- Organising debate meetings and workshops related to ecotourism in order to set stronger connection between all stakeholders.
- Offering public support to the NGO sector in the promotion and execution of ecotourism activities.
- Inviting big tour operators and investment companies to invest and cooperate with the ecotourism sector in Boka Kotorska.

Long-term recommendations (>3 years)

- Creating an ecotourism umbrella association (network) to put in contact all stakeholders, offer specialised services and have impact to decision makers at the local and national level.

6. Promotion of ecotourism products

Short- and mid-term recommendations (1-3 years)

- Establishing mechanisms of institutional support to local companies and administrations in Boka Kotorska to promote ecotouristic activities and products.
- Integrating in all ecotouristic promotional actions and products other values as cultural heritage, spiritual values and local food production.
- Creating specific campaigns to recruit ecotourists from existing tourist centres and sources of demand (marinas, resorts, historical cities, etc.), which imply more close cooperation with other types of tourism such as beach, nautical, MICE and medical tourism.
- Publishing and specific brochure and map with ecotourism products and main ecotouristic attractions in Boka Kotorska, which should be available in national and local tourism websites and tourist offices.
- Increasing the effort and resources dedicated to environmental education for the local population

through new campaigns and integrating environmental protection in school activities.

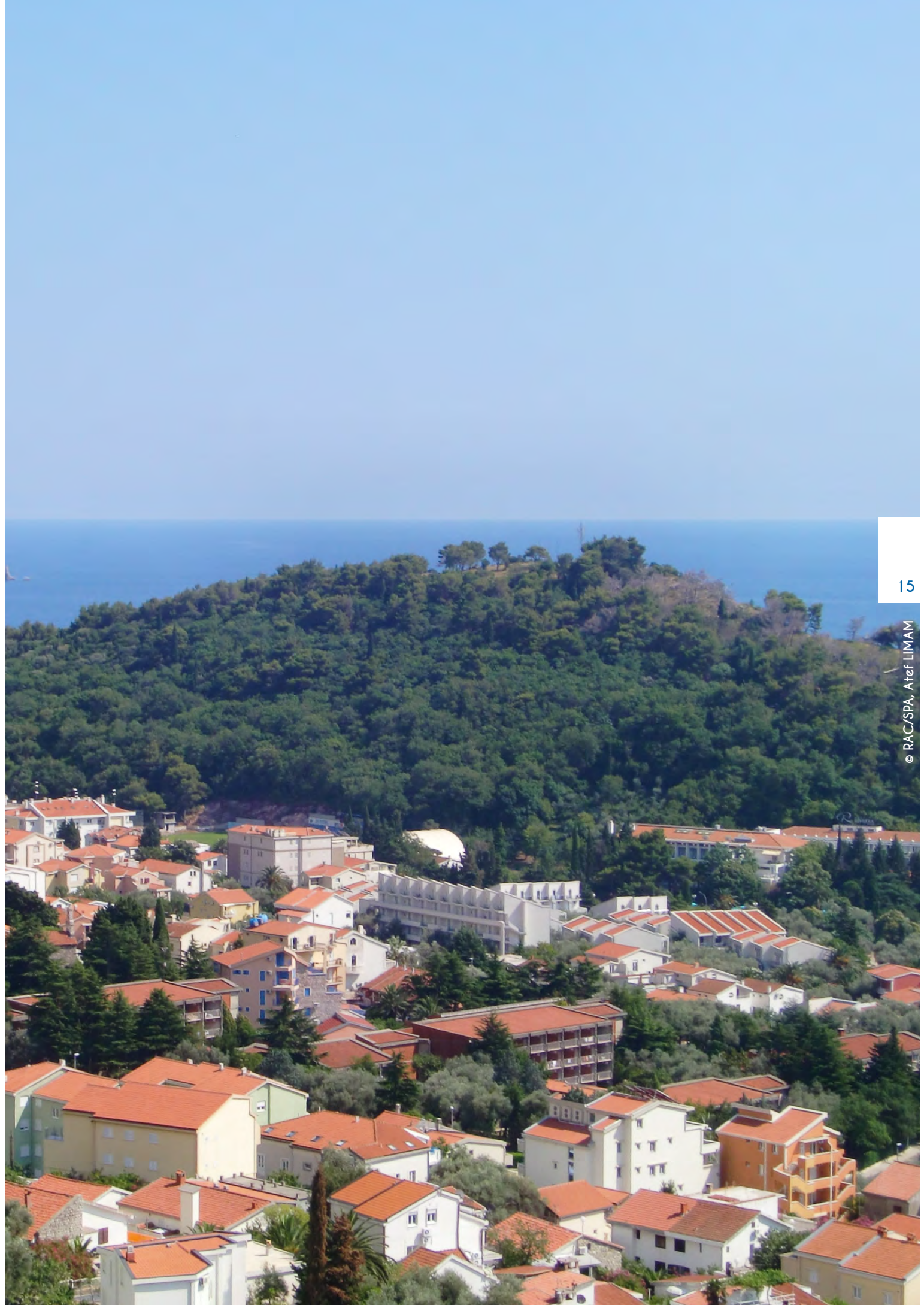
- Promoting the use of sustainable tourism labels by the private sector in Boka Kotorska, with special attention to the EU ECOLABEL standard and the European Charter of sustainable tourism.

Long-term recommendations (>3 years)

- Engaging National Tourism Organisation of Montenegro and local tourism organisations (TO Kotor, TO Herceg Novi, TO Tivat) to cooperate

and promote Boka Kotorska and Montenegro as an ecotourism destination. Ecotourism should be promoted as part of a responsible and sustainable tourism offer. A marketing plan of ecotourism in Montenegro could be developed and implemented.

- Carrying out a large-scale campaign with local and national media to let people know ecotourism and its associated benefits.
- Undertaking necessary steps to obtain the Europarc European Charter for Sustainable Tourism in Lovćen National Park.





1. INTRODUCTION: WHY A FEASIBILITY STUDY ON ECOTOURISM IN BOKA KOTORSKA?

The Regional Activity Centre for Specially Protected Areas, and the Regional Activity Centre for Sustainable Consumption and Production (SCP/RAC), aiming at supporting the CAMP Montenegro, promote this study on the feasibility of ecotourism for local development in Boka Kotorska. This task has been entrusted by the Mediterranean Action Plan (MAP) to support the Mediterranean Strategy for Sustainable Development (MSSD), in line with the agenda of the Sustainable Consumption and Production Initiative from the United Nations Environmental Programme (UNEP).

1.1. Rationale and objectives of the feasibility study

Why a feasibility study on ecotourism in Boka Kotorska (Bay of Kotor, Montenegro)? As will be dealt in next sections (see 1.5), ecotourism is a good and desirable economic activity, and should be part of a green and blue economy strategy. Development of ecotourism can contribute with positive effects in the following areas: ecology, education, local self-governance, agriculture as well as total economic development of the Boka Kotorska area. It can also contribute in the preservation of natural environment, marine ecosystem and promotion of a healthier life style. All in all, ecotourism can help achieving the delicate balance between economic activity and nature conservation thus contributing to the desired general sustainability of the coastal area of Montenegro.

However, the development of ecotourism needs certain conditions, in terms of economic, environmental and social requirements. It is necessary to assess the potential for ecotourism in the region, and study the tentative steps that can be taken to begin the process of ecotourism development. Ecotourism business can reduce the current threats to the natural and cultural heritage of Boka Kotorska? Can it be economically, socio-culturally and environmentally viable? Who are the main stakeholders? What are the competitive advantages of the region? Which recommendations can be made to address ecotourism development in the region? Overall, will ecotourism be feasible and sustainable in Boka Kotorska?

To answer these questions, this Feasibility study on Ecotourism for local development in Boka Kotorska has been produced. This study analyses the sector of tourism and ecotourism in Boka Kotorska and assesses the potential of ecotourism entrepreneurship and businesses in Kotor. The study comes up with recommendations on the implementation of ecotourism in Boka Kotorska in order to enable integrated coastal zone management (IZCM) of the coastal area of Montenegro.

The objectives of the study are:

- To analyse the tourism sector and to assess the potential of ecotourism in Boka Kotorska.
- To present strategies and recommendations for the implementation of ecotourism in Boka Kotorska
- To contribute to the ICZM of the coastal area of Montenegro.

The present feasibility study is intended to provide independent and objective information to the relevant stakeholders, useful to decide whether an ecotourism scheme would be an economically, socio-culturally and environmentally viable hypothesis of development.

1.2. Study area: Boka Kotorska (Montenegro)

The study area of this feasibility study is Boka Kotorska (Bay of Kotor), one of the most renowned stretches of the Montenegrin coast, part of which has been designated as UNESCO's World Heritage Site. This area comprises three coastal municipalities – Herceg Novi, Kotor and Tivat. The total length of the mainland seashore is 105,5 km. The area hosts a rich biodiversity, expressed in a huge variety of landscapes, from the bay itself to the mountains that surround it.

The bay is about 28 km long from the Adriatic Sea to the harbour of the city of Kotor. It is surrounded by mountains of Orjen on the west and Lovćen on the east, divide waters of the bay into four smaller bays: Herceg Novi and Tivat, which form the outer part, Kotor and Risan bay, which are connected with two straits -Kumborski and Verige. The narrowest section, Verige strait, is only 300 m long, and can be crossed by a ferryboat.

The outermost part of the bay is the Bay of Tivat. On the seaward side, there is the Bay of Herceg Novi, which guards the main entrance to the Bay of Kotor. The inner bays are the Bay of Risan to the northwest and the Bay of Kotor to the southeast. There are seven islands in Boka Kotorska: Mamula, Sv. Marko, Gospa od Skrpjela, Sv. Djordje, Milosrdja, Ostrvo Cvijeca and Mala Gospa. Along the whole coast of Boka there is a chain of small towns and settlements all of which has its own story and history worthy.

The bay has been inhabited since antiquity. Its well preserved medieval towns of Kotor, Risan, Tivat, Perast, Prčanj and Herceg Novi, along with their natural surroundings, are major tourist attractions.



Map 1. Boka Kotorska region

Source: <http://www.bestofboka.com/>

1.2.1. Demographics

The coastal area is the most populated part of Montenegro. According to the last population census in

Montenegro (Monstat, 2011), there were 148.683 people (about ¼ of total population) living in this region. In Boka Kotorska live 67.496 people, which makes 10.9 % from entire population in Montenegro.

Table 3. Overview of region with accompanying municipalities and their main indicators

Municipality	Population		Area		Population/km ²
	Number	% MNE	km ²	% MNE	
Herceg Novi	30864	5,0	235	1,7	131.3
Kotor	22601	3,6	335	2,4	67.5
Tivat	14031	2,3	46	0,3	305.0
Total	67496	10,9	616	4,4	

Source: Monstat, Population Census 2011

When speaking of education structure, the highest share had population with completed secondary school (54-58 %, depending on municipality), while the share of

population with higher/high education range within limits of 21-24 %, depending on municipality.

Table 4. The highest degree of population education by municipalities

Municipality	Unknown	No education	Incomplete primary school	Primary school	Secondary school	Higher and high education
Herceg Novi	89	217	1322	3352	15012	5773
Kotor	114	210	1112	2800	10131	4482
Tivat	74	154	547	1627	6738	2416

Source: Monstat, Population Census 2011

1.2.2. Economic profile

According to Census 2011, in Boka Kotorska there were 2.345 registered employees, or slightly above 13 % of total employed, which is considerably high number considering the share of the area in Montenegro's total surface (4.4 %). Population in this area greatly depends on revenues from

tourism. According to Monstat data for 2013, average wages, with no taxes and contributions included, in this area, with exception of Tivat, range around national average of € 485 (Herceg Novi- 423 €, Kotor - 483€, Tivat - 798€). 84.14 % of the active population is employed (by municipalities Tivat 82.84 %, Kotor 84,42 % and Herceg Novi 84.52 %).

Table 5. Active population and employment by municipality

	Active population	% MNE	Employees	% MNE	Unemployed	% MNE
Herceg Novi	12734	5,49	10763	6,14	1971	3,47
Kotor	8969	3,87	7572	4,32	1397	2,46
Tivat	5686	2,45	4710	2,69	976	1,72
Montenegro	27389	11,81	23045	13,15	4344	7,65

Source: Monstat, Population Census 2011

When it is about general macroeconomic situation, almost all (except the data of unemployment) indicators

are available only on national level. Those indicators are presented in table 6.

Table 6. Macroeconomic indicators in Montenegro, 2008- 2013

	2008	2009	2010	2011	2012	2013 ⁽¹⁾
GDP (mil. €)	3.085,6	2.981,0	3.104,0	3.234,0	3.148,9	3.311,0
Real GDP growth (%)	6,9%	-5,7%	2,5%	3,2%	-2,5%	2,6%
GDP per capita (in €)	4.908	4.720	5.006	5 216	5.079	5.340
Inflation	6,9	1,5	0,7	3,0	5,1	1,1
Industry production (growth %)	-2,0	-32,2	17,5	-10,5	-7,1	8,8
Number of employees	166.221	174.152	161.742	163.082	166.531	167.607
Number of unemployed	29.535	28.385	31.864	30.869	30.182	34.680
International debt MNE (mil. €)	481,7	699,9	912,4	1.063,7	1.295,0	1.363,9
Export (in mil. €)	416,2	277,0	330,4	454,4	366,9	305,4
Import (in mil. €)	2.529,7	1.654,2	1.657,3	1.823,2	1.820,9	1.299,7

Sources: Monstat, Central Bank of Montenegro

Overturn in the economic development of Montenegro has been noted in 2009 when the consequences of economic crisis had reflected on the Montenegrin economy. At that time, a decrease in GDP has been noted by 5,7 % which has been followed by the two yearlong recuperation period (specifically in sectors: tourism, retail, information technology and communication) and final end of recession in 2013 when the increase of 2,6 % in GDP has been noted. Number of employees has been reduced in 2010 due to decrees of the number of employees in public sector following the reduction in private sector. In 2011 number of employees increased. Most of the employees were recorded in the service sector. Montenegrin economy became import- dependable while its export was 4 times lower than import. Significant increase was noted in foreign direct investment after the slight decrease in 2010 and 2011 year.

1.2.3. Rural development

Rural areas in Montenegro are defined with low population density mainly employed in agriculture and forestry. Local rural areas in Boka Kotorska, as in other parts of Montenegro, present low population density, spread settlements and concentration of construction and equipment in the valleys near bigger cities. Boka Kotorska rural areas are divided in five groups:

- Rural areas located near highly urbanized areas and towns ;

- Rural touristic areas ;
- Rural areas with mixed activities (mainly agriculture, but also tourism, industry, services, etc.) ;
- Mainly agriculture rural areas ;
- Hardly reachable rural areas in hills and mountain areas, where typical activities are forestry and intense cattle breeding.

According to the population census from 2009, 2.16 % of entire population employed in agriculture is from Boka Kotorska. Majority of them is from Herceg Novi followed by Kotor (Fig. 1).



Source: Population Census 2011; Monstat

Figure 1. Distribution of people employed in agriculture in Boka Kotorska, by municipalities

⁽¹⁾Data referring to January - September 2013. - inflation, industrial production, international debt, export and inport, FDI (Foreign Direct Investments) ;
Data referring to January - November 2013. - (un)employees ;
Data referring to January - December 2013. - GDP (Gross Domestic Product- estimated value).

1.3. Methodology and main sources of information

This feasibility study is based on existing data and the results of a brief participative process, namely a workshop focused on ecotourism held in Kotor in January 2014, and a set of surveys and interviews to previously identified relevant stakeholders during May 2014. In addition, the study has gathered best available ecotourism methodology, knowledge and practice to be selected as the most relevant for Montenegro. As part of the coordination tasks of the study, two field visits have been made during the

elaboration of the study, one coinciding with the workshop, and the second one at the final stage of the study, to confirm on the field some of the findings and proposals of the study.

Overall, the study has been produced after a participative process and a multidisciplinary work of an international team of experts, both from Montenegro and abroad, to bring the best available knowledge to offer a complete vision of ecotourism in Boka Kotorska.

The following table shows the calendar of tasks undertaken during the elaboration of the study.

	2013				2014					
	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Coordination of the study										
Parallel research on ICZM										
Desk research: data analysis										
Workshop preparation										
Workshop on Ecotourism										
Workshop proceedings										
Stakeholders identification										
Survey & interviews										
Feasibility study writing										
Document review										

* Field visits and meetings

The following sections describe the main methodological milestones of the feasibility study:

1.3.1. Desk research

The desk research, as an input of the feasibility study, aims to identify and analyse information to obtain an overview of the current situation and potential of the ecotourism sector in Boka Kotorska. In those terms, existing information about key issues related to ecotourism in Boka Kotorska and Montenegro has been gathered and delivered, and the current situation and perspectives of this sector have been described.

1.3.2. Workshop on Ecotourism

From 30th January to 1st February 2014, Kotor hosted an international workshop where academic and professional debates took place to define the critical issues to promote ecotourism as a strategy for local development in Boka Kotorska.

The workshop was aimed at the main stakeholders of the ecotourism sector in Boka Kotorska: local eco-

entrepreneurs, travel agencies, public authorities, NGOs, university centres and international bodies. All actively participated providing the workshop with vast amount of information, knowledge on ecotourism and good practices for both the entrepreneurship and country level practice in this field.

The aim of the workshop was to share best practices, obtain a SWOT analysis and define strategies to boost ecotourism. The workshop was also developed in such a way as to provide methodology to undertake a project of entrepreneurship on the ecotourism sector, and illustrate it by applying practical examples, which in line helped encourage networking and interaction among participants. In particular, these were the detailed objectives:

- To serve as a diagnosis and involvement tool of the main stakeholders with the feasibility study on the ecotourism sector in Boka Kotorska.
- To provide a methodology to undertake a project of entrepreneurship on the ecotourism sector, and illustrate it by applying to a practical example: to identify lines of action for the promotion of ecotourism in the region.

- To inspire participants through case studies of successful local and international ecotourism, and, if possible, the development of the workshop in a natural environment.
- To encourage networking and interaction among participants, in order to build lasting relationships for

both the contribution to the feasibility study and to boost the sector in general.

The workshop took place in Hotel Cattaro and the Town Hall of Kotor, and was delivered in English. The following table summarizes the schedule of the workshop.

	Thursday 30 th Jan (Workshop)	Friday 31 st Jan (Workshop)	Saturday 1 st Feb (Stakeholders Day)
AM	Institutional presentation Theoretical introduction	Working Groups Session: diagnosis	Working Groups Session: entrepreneurial projects
PM	Institutional presentation Theoretical introduction	Working Groups Session: critical issues and stakeholder identification	Project presentation Multistakeholders Round Table Closing session

The results of the workshop were put together and summarised on a document (Workshop proceedings) endorsed by the attendees and other experts involved in the Workshop. The workshop proceedings are included as an annex to the Feasibility Study.

1.3.3. Identification of relevant ecotourism stakeholders

Ecotourism stakeholders are organisations and entities, both public and private, which by themselves or because of their capacity of influence can have a strong impact in the development of ecotourism. To identify the stakeholders that may have relevant incidence in the development of ecotourism in Boka Kotorska is crucial. To do so, a sociogram was developed, and an exhaustive list of stakeholders was prepared, identifying private and public institutions, universities and research centres, non-profit organisations and international bodies.

Some of the identified stakeholders are described in section 3.5 and a full list is available as an annex of the Feasibility study.

1.3.4. Surveys and interviews

A survey and a set of interviews were designed to complete the available information collected during the desk research phase, and contrast and validate the results obtained during the Workshop on Ecotourism.

The surveys and interviews were conducted with relevant stakeholders (at local and national level) previously identified, as already mentioned. Section 3.5 indicates which stakeholders were interviewed during this phase of the study.

The survey was posted in the Internet through an on-line questionnaire. The interviews were conducted personally. Before each interview, the interviewee had to answer the on-line survey. The interviews were performed by an expert on ecotourism as interviewer with the support of an assistant as rapporteur (taking notes of the interview to facilitate its later transcription).

The use of surveys (quantitative methodology) and interviews (qualitative methodology) allowed having complementary results, and with the Workshop (a deliberative methodology), the triangulation of social research techniques was completed.

Table 7. Participation period and number of participants for the surveys and interviews

	Period	Participants
Surveys	12 th May – 16 th June 2014	50
Interviews	19 th May – 23 rd May 2014	15

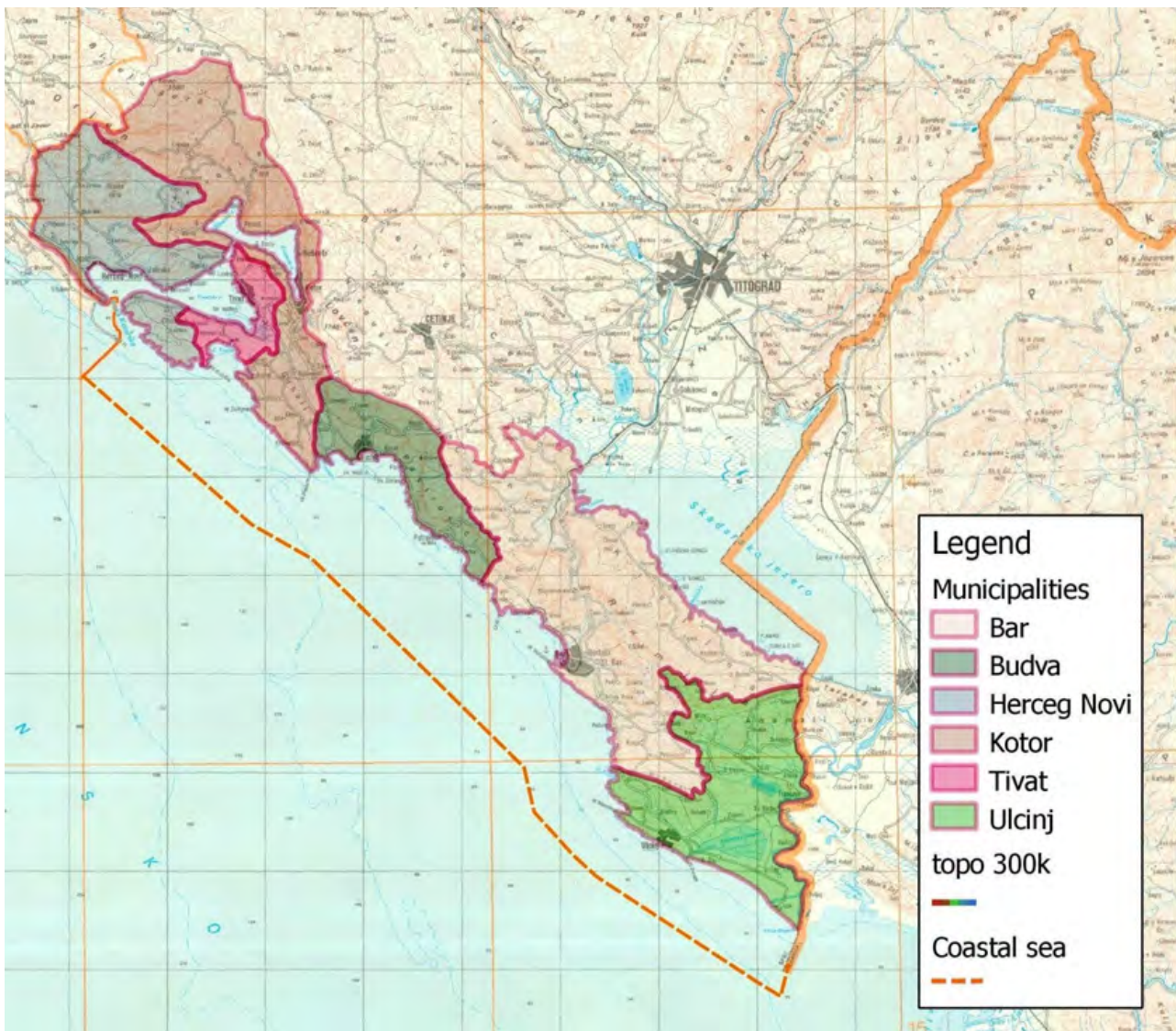
1.4. Integrated Coastal Zone Management (ICZM) and Coastal Area Management Programme (CAMP) Montenegro

Integrated Coastal Zone Management (ICZM) is a process for the management of the coast using an integrated approach, regarding all aspects of the coastal zone, including geographical and political boundaries, in an attempt to achieve sustainability. This management approach considers and balances the three dimensions of sustainability: economic, social and environmental, and advocates for green economy, understood as an economy that results in reducing environmental risks and ecological scarcities, and that aims for sustainable development without degrading the environment.

The Coastal Area Management Programme (CAMP) is the Mediterranean Action Plan (MAP) initiative aiming to introduce ICZM at local and national level, and

to support institutional strengthening and capacity building. It is a collaborative effort between MAP and its Regional Activity Centres (the Priority Actions Programme/Regional Activity Centre, PAP/RAC), national and local authorities and international funding institutions. CAMP is based on the principles of sustainable development and integrated planning and management of the Mediterranean coastal areas.

The areas covered by the CAMP Montenegro comprise the entire coastal area because the systemic problems that need to be addressed to ensure the sustainable development of the coastal areas are the same for the entire region. Thus, the CAMP Montenegro project area comprises six coastal municipalities - Herceg Novi, Kotor, Tivat, Budva, Bar and Ulcinj - with a total surface of 1,591 km² and internal waters and territorial sea with the surface of around 2,500 km². The total length of the mainland seashore is 288,2 km (out of which 105,5 km in the Bay of Boka). The following figure (Map 2) shows the project area of CAMP.



Source: <http://www.camp.mrt.gov.me/index.php/o-camp-u/projektno-podrucje>

Map 2. Areas covered by CAMP Montenegro

The main objectives of the CAMP are:

- To develop sustainable development strategies and procedures in the areas that fall within projects' scopes, with special emphasis on implementation of the Protocol on ICZM in the Mediterranean⁽²⁾ ;
- To apply relevant methodologies and instruments ;
- To contribute to capacity building at local, national and regional level ;
- To ensure wider use of results achieved in the region.

Among the objectives of the CAMPs there is the development of sustainable strategies contributing

to capacity building at local, national and regional level with special attention at maintaining development potential, primarily through preservation of resource base of the area and of the quality of natural and man-made environment.

Amongst the activities planned by CAMP Montenegro (Table 8), there is a focus on tourism development in balance with the coastal carrying capacity and vulnerability. To that regard, ecotourism can be presented as a tourism activity that falls into the definition of green economy and that can offer solutions to the environmental and social challenges posed by mass-tourism and other conventional tourism activities.

Table 8. CAMP Montenegro Activities

1. Support for the ICZM Strategy/Plan and Coastal Area Spatial Plan (CASP) of Montenegro
1.1 Analysis of implications of the ICZM Protocol for spatial planning
1.2 Preparation of sectoral baseline studies of selected coastal subsystems
1.3 Coastal vulnerability, attractiveness and suitability assessment
1.4 Inputs for coastal carrying capacity, especially regarding the capacities in the sector of tourism development
1.5 Recommendations to strengthen beach management system in Montenegro
1.6 Contribution to coastal GIS database with indicators as a core future coastal monitoring observatory
2. ICZM framework setup
2.1. Proposal of the ICZM institutional-legislative framework setup in coastal zone of Montenegro
2.2. Recommendations for selected ICZM measures, including coastal setback elaboration with rules of its implementation/adaptation
2.3. Facilitating implementation of ICZM Protocol principles in final CASP and SEA formulation
3. Realisation of the pilot project on testing the Ecosystem Approach (ECAP) application in Boka Kotorska by making the special reference to nutrient inputs from diffuse sources, ecosystem valuation and green entrepreneurship

Source: <http://www.camp.mrt.gov.me>

⁽²⁾ ICZM Protocol, ratified in December 2011 under the Barcelona Convention..

1.5. Ecotourism, a driver of conservation and development

The International Union for Conservation of Nature (IUCN) describes ecotourism as “Environmentally responsible travel to natural areas, in order to enjoy and appreciate nature (and accompanying cultural features, both past and present) that promote conservation, have a low visitor impact and provide for beneficially active socio-economic involvement of local peoples”.

The World Tourism Organization (UNWTO) defines ecotourism as a form of tourism with the following characteristics⁽³⁾:

- All nature-based forms of tourism in which the main motivation of the tourists is the observation and appreciation of nature as well as the traditional cultures prevailing in natural areas. In this sense, in some studies UNWTO talks about *biodiversity based tourism*.
- It contains educational and interpretation features.
- It is generally, but not exclusively, organised for small groups by specialized and small locally owned businesses. Foreign operators of varying sizes also organize, operate and/or market ecotourism tours, generally for small groups.
- It minimizes negative impacts on the natural and socio-cultural environment.
- It supports the protection of natural areas by:
 - generating economic benefits for host communities, organizations and authorities that are responsible for conserving natural areas;
 - creating jobs and income opportunities for local communities; and
 - increasing awareness both among locals and tourists of the need to conserve natural and cultural assets.

The main motivation of the ecotourist, different from that of other tourists that also visit natural areas, is to see, enjoy and learn about the diverse manifestations of nature and the landscape; animal or plant species which are remarkable or difficult to watch, rare ecosystems or with a particular interesting aspect, pristine, singular or colourful landscapes, spectacular or unusual geological forms, and so forth.

In spite that ecotourism can be practiced in any natural area or landscape with a certain degree of interest, it takes place more often in legally protected areas, such as national and natural parks.

Recognising its global importance, the United Nations designated the year 2002 as the **International Year of Ecotourism**, and its Commission on Sustainable Development requested international agencies, governments and the private sector to undertake supportive activities. The World Tourism Organisation (WTO) and the United Nations Environment Programme (UNEP) joined forces in the preparation and co-ordination of some activities to be undertaken at the international level during that year. Among the many activities undertaken at the global, national, regional and local levels, The World Ecotourism Summit, held in Quebec City, Canada from 19 to 22 May, was the principal event. The purpose of the Summit was to bring together governments, international agencies, NGOs, tourism enterprises, representatives of local and indigenous communities, academic institutions and individuals with an interest in ecotourism, and enable them to learn from each other and identify some agreed principles and priorities for the future development and management of ecotourism⁽⁴⁾.

At European level, there is The European Ecotourism Network (EEN)⁽⁵⁾, a network of organisations aiming to ensure that ecotourism services in Europe contribute to a genuine conservation and sustainability effort. Their target is to connect ecotourism stakeholders across Europe and facilitate the transfer of knowledge and experience for the benefit of ecotourism practitioners, academics and policy makers. EEN supports the development and implementation of the European Ecotourism Labelling Standard (EETLS) - an initiative that ensures baseline standards of quality in ecotourism while avoiding at the same time green-washing and unsustainable operations. EEN supports the training resources and the quality evaluation tools developed by the ECOLNET project.

EETLS -the European Ecotourism Labelling Standard-⁽⁶⁾ is a baseline quality standard developed along the lines of the Global Sustainable Tourism Criteria, for European Ecotourism. The EETLS is the result of a lengthy development and consultation process that documented international best practice leading to a set of criteria and indicators that are suitable for ensuring quality of ecotourism services.

The EETLS is complimentary to existing certification schemes, setting minimum acceptable standards that can be used by certification schemes and quality labels to benchmark and, hopefully, adjust their own requirements. The EETLS aims to provide a Europe-wide dimension of ecotourism quality certification, offering the possibility for an EETLS-compliance sign integrated in the existing labels.

⁽³⁾ Source: World Tourism Organization (2001). *The British Ecotourism Market - Special Report*.

⁽⁴⁾ More information about The World Ecotourism Summit: <http://www.unwto.org/sdt/IYE/IYE/quebec/anglais/Final-Report-QuebecSummit-web.pdf>.

⁽⁵⁾ <http://www.ecotourism-network.eu>.

⁽⁶⁾ More information: <http://www.ecotourism-network.eu/en-ecotourism-standard/en-the-euro-eco-label-stand>.

1.5.1. Relationship of ecotourism to other types of tourism and sustainable tourism

There is often confusion between ecotourism, rural tourism and active tourism, in spite of them being different tourist modalities. This confusion is understandable to certain extent since they all share the scenario where they take place (the natural environment). In fact, different tourist modalities that are practiced in the natural environment have been grouped in some studies under the concept nature based tourism. However, the term nature based tourism usually refers to a set of modalities of tourism that also take place in the natural environment and include ecotourism but also other modalities with motivations and requirements clearly different from those of ecotourism.

The main difference between ecotourism and other touristic modalities is what motivate ecotourists to travel. Ecotourists want to visit natural areas and watch the natural elements that are part of them but in the case of active tourism (or adventure tourism), it is to do different kinds of sports of a certain physical intensity, which, in some cases, involve some risk. The same can be said about rural tourism, which is mainly intended to come into contact with rural environments and activities.

On the other hand, ecotourism is often confused with sustainable tourism. **Is sustainable tourism the same thing as ecotourism?** A clear distinction should be made between the concepts of ecotourism and sustainable tourism: the term ecotourism itself refers to a segment within the tourism sector, while the sustainability principles (sustainable tourism) should apply to all types of tourism activities, operations, establishments and projects, including conventional and alternative forms. In this sense, we could talk about sustainable rural tourism, sustainable urban tourism, sustainable cultural tourism, sustainable active tourism and so forth. It is true, though, that ecotourism –if it is correctly developed and applied– guarantees the integration of a number of principles of sustainability and of conservation of natural resources that are not often observed by other tourism modalities. UNWTO defines sustainable tourism⁽⁷⁾ as “tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities”.

Despite the need of conceptual differentiation in front of other tourist modalities that take place in the natural and rural environment, the relationship between ecotourism and other modalities must be stressed.

This is easily explained by the fact that a tourist package can include a collection of ecotourist activities coupled with other activities that are more likely to belong

to rural, cultural or gastronomic tourism among others. This way ecotourism could be further promoted with a strategy to restructure or complement other existing tourist activities.

1.5.2. A glance to the International ecotourism market

The most notable way that conservation impacts positively upon employment and incomes is through tourism related to nature. The tourism industry is characterised by significant levels of spending, high business start-up potential and diverse employment opportunities, often thriving most within remote, rural or coastal communities where alternative economic opportunities can be limited. According to the World Tourism Organisation (WTO), in 2020 ecotourism will be the tourist sector with the highest increase rate. It could mean around 30 % of world tourism activities. Beyond that, it is considered the fastest growing sector in the world's largest industry (growing three times more quickly than other segments of the tourism industry - 20 % per year) with annual exports in the U.S. over \$ 100,000 million.

Domestic UK trips taken to the natural environment increased by 10 % between 2005 and 2009, despite general tourism trips declining by 9.2 % in this period. In 2009/10, the English adult population participated in an estimated 2.86 billion visits to the natural environment, with visitors spending an estimated £ 2.4 billion on these trips. Recent studies have shown that the natural environment supports almost 750,000 Full Time Equivalent (FTE) jobs and over £ 27.5 billion of economic output across the UK. In Scotland, it is currently estimated that nature-based tourism supports spending of £1.5 billion per year and 39,000 FTE jobs. The contribution of nature tourism to the economy is significant and its importance is growing year by year.

Visits to Royal Society for Protection of Birds (RSPB) reserves grew a staggering 38 %, from around 1.5 million to almost 2 million, between 2005 and 2009. Over 1,000 local FTE jobs were supported by visits to RSPB reserves in 2009, three times the number that were supported in 2002 (RSPB, 2011)⁽⁸⁾.

According to the International Ecotourism Society (TIES), global trends leading to ecotourism are:

- Increased in the overall travel market ;
- Growth in popularity of vacations to natural areas – particularly dramatic growth rates to parks in developing countries ;
- Massive dissatisfaction with the simplistic travel packages offered by travel firms and a desire for more educative and challenging vacations ;

⁽⁷⁾ Source: World Tourism Organization (2005). *Making Tourism More Sustainable – A Guide for Policy Makers*.

⁽⁸⁾ Royal Society for Protection of Birds (2011). *Natural Foundations. Conservation and local employment in the UK*.

- Urgent need to generate funding and human resources for the management of protected areas in ways that meet the needs of local rural populations ;
- Recognition of the importance of tourism within the field of sustainable development ;
- Provide employment and other avenues of income to rural communities where ecotourism resources are often located.

What travel consumers are demanding? Factors influencing destination choice

It seems, in today's constantly evolving world of online communications and social media, the answer is decidedly "from each other." According to the Global Benchmarking Survey by TRAVELSAT, which looked at factors, influencing international travellers' destination choice, 38 % of 15,000+ international tourists from 30+ markets said they choose their destination based on "friends and relatives' recommendation." ⁽⁹⁾

The same trend can be seen in the areas of ecotourism and sustainable tourism. According to Traveller Study Report 2010 by CMI Green which surveyed 2,768 adults from across the United States about their purchasing motivations regarding socially and environmentally responsible travel, consumers today are influenced by each other, and not so much by advertising. Almost half the respondents said they see peer reviews and "word of mouth from friends" to be "very influential" when planning a vacation. "Traveller reviews on websites and blogs" were also seen as "very influential" by half as many respondents, whereas most ranked advertising last in terms of influence.

"Trusting peers is not only a very human response; it's a Web 2.0/social media response. When so many leading sales

sites offer peer reviews and discussion, customers look for that in their green travel choices as well. In a world where a negative opinion can go viral overnight, giving the customer a positive, rewarding, unique and thoroughly sustainable experience is every travel company's first order of business." (CMI Green Traveller Study Report 2010).

Increasingly, today's well informed travel consumers are demanding environmentally conscious and socially responsible options - without, of course, compromising on quality. These consumers who support companies and brands whose values are in line with their own (or, identified by the leading marketing firm Green Team as "The Awakening Consumer"⁽¹⁰⁾) are seeking products and brands they can identify with, are weary of green-washing or sustainability claims that cannot clearly be substantiated, and are hungry for credible information. This trend is evident by the increasing number of green travel resources on travel booking sites. Travelocity (e.g., Travel for Good program), Expedia (e.g., Green Travel Guide), and Rainforest Alliance (see sustainabletrip.org) to name a few, have launched travel green sites to assist consumer interest and demand in more sustainable travel. These sites include a "feedback loop" whereby consumers of travel can report back on their experience and express any concerns with the sustainability of the property.

These conscious consumers, however, are not interested in hearing only about sustainability practices. The traveller has advanced past looking for green travel products in the stage of purchase to having to have those experiences and sustainability practices embedded into the business and the experience themselves. Sustainability is still part of the story, but not the story itself. People do not travel for sustainability, they expect it to be sustainable but they travel for the authenticity of the destination or the place and for the experience.

Table 9. The European Charter for Sustainable Tourism. Some facts

The European Charter for Sustainable Tourism (ECST) in protected areas builds partnerships to improve sustainable development and the management of an area's natural and cultural heritage. It is promoted by Europarc Federation. Some facts of ECST:

- **73 M people** (1.5M visitors/park on average) visit European Charter protected areas annually. A great audience to see how sustainable tourism can work in practise.
- **700 local products** are supported by parks and businesses operating under sustainable tourism principles. Bringing local products and traditions to tourism marketplace.
- **3206 organisations** (61 local organisations / area on average) across Europe are working in partnership to deliver sustainable tourism and nature conservation.
- **441 M €** (1.8 M €/ park/year) are invested by Charter protected areas to accomplish their sustainable tourism actions.
- **4 M people** (97 304 people / area) live inside protected areas where tourism is managed sustainably.

Source: Europarc Federation (2013). Detailed information available here: <http://www.europarc.org>.

⁽⁹⁾ About Tourism - "Top Factors Influencing Destination Choice" (2011): <https://abouttourism.wordpress.com/2011/10/03/top-factors-influencing-destination-choice/>.

⁽¹⁰⁾ *The Rise of the Awakening Consumer - Seven Rules to Influence Today's Most Influential Consumers*, ed. JC Darne (2011).

1.5.3. Benchmarking of ecotourism and biodiversity policies in Mediterranean countries

During 2013-2015 period the European Programme ENPI-CBC “Mediterranean basin” is funding the project “Mediterranean Experience of Eco-Tourism” (MEET)⁽¹¹⁾ implemented by a partnership of nine Mediterranean bodies. To understand the ecotourism policy context of each country participating in the project, a pre-report of a survey of existing ecotourism policies in the countries involved in the MEET project has been developed. It describes the state-of-the-art of public policies concerning nature-based tourism and the main undergoing initiatives and actions concerning ecotourism and/or sustainable tourism. Departing from that valuable document a benchmark highlighting the most relevant countries to compare with Montenegro Policies has been done.

France

Historically in France, conservation of natural sites and tourism infrastructures came about only after tourism revealed the value of heritage (laws in 1906, 1913 and 1930 for the protection of natural monuments, historic monuments and sites). Ecotourism enables local populations (to be considered the trustees of their natural and cultural heritage) to develop activities (accommodation, crafts) and remain in their home region. Ecotourism is also a means of increasing the public’s awareness and education about the environment. Finally, this activity is a source of financing to preserve biodiversity.

The ambitions of the new **National Strategy for Biodiversity 2011-2020** are to:

- Preserve, restore, reinforce and enhance biodiversity ;
- Ensure it is used in a sustainable and fair way ;
- Succeed in getting everyone from all sectors of activity involved.

Italy (Lazio Region)

In 2013 a Strategic Plan for the development of tourism was drawn up in Italy: “**Italian Tourism 2020: Leadership, Jobs, South**”. It has mainly three objectives: to give back the leadership to Italy in the tourism sector, to create new jobs, and to offer an unrepeatable opportunity to Southern Italy to latch onto the growth of the nation. Nevertheless, there is no provision in the Plan for engagement of “sustainable tourism” or “ecotourism”.

When it comes to the most important region for tourism in Italy (Lazio), there is no official eco-tourism policy implemented at the moment by that region. Anyhow, sustainable, responsible and quality tourism is mentioned many times in the “**Regional Tourism Plan 2011 - 2013**” (the only available official document at present, approved on November 17th 2010) even though the subject “ecotourism”

is not directly treated but appears as a cross-sectional item that is unfortunately described in a very slight, confused, not binding and ineffective way.

Spain (and Catalonia Region)

In the last few years, a process has initiated in order to evaluate and debate about a new tourist model for Spain, targeted on the natural heritage and landscape, in a moment of reconversion of many sectors of economy and, particularly, the tourism sector. This debate had in mind the objective of avoiding seasonality or excessive concentration of the economic gains and the number of tourists, which peak in certain periods of the year.

Recently was endorsed a **Sectorial Plan on Nature Tourism and Biodiversity 2014-2020** (June 2014). This sectorial plan aims:

- To value biodiversity through nature tourism ;
- To promote a sustainable tourism as added value to integrate environmental conservation with a socio-economic improvement of rural populations ;
- To integrate conservation objectives in tourism policy and to promote the Natura 2000 Network, the largest network of protected areas in the world, to which Spain contributes with a 27 per 100 of its territory.

Regarding Catalan region, it has been also endorsed **Management Plan of Protected Areas in Catalonia 2014-2016**, were nearly 30 per 100 of its territory is protected. The main goals of this management plan are:

- To ensure the conservation and enhancement of natural values and biodiversity of natural areas of special protection ;
- To guarantee sustainable management of activities developed in those areas, to strength their role to improve both natural preservation and social development ;
- To apply the principle of multi-functional management as a tool for conservation.

Greece

The primary objective of the **National Strategy for Tourism 2011-2013** is to enrich Greece’s tourism product, to upgrade the services provided and to extend the tourism season, by supporting greater extraversion and competitiveness.

The four basic principles of the Greek National Strategy for Tourism are summarized as follow:

- Developing a functional and modern institutional framework for tourism and alternative forms of tourism ;
- Strengthening entrepreneurship by facilitating investments and utilizing the funds of NSRF ;

⁽¹¹⁾ Source: The Mediterranean Experience of Ecotourism – MEET <http://www.medecotourism.org/>

- Ensuring high quality of infrastructure and services ;
- Investing in human resources.

Malta

Within the **National Tourism Strategy 2012-2016** some environmental goals are developed:

- To ensure that tourism and environment not only coexist but actually complement each other and contribute to each other's well-being ;
- To give added value to build a natural heritage thereby ensuring their protection ;
- to achieve better quality of life in urban areas, as it improves the quality of the tourist experience ;
- To minimize resource use and contribute to a low-carbon, eco-efficient and resource efficient economy ;
- To monitor the tourism industry and take necessary measures to mitigate pollution and to reduce the negative impacts on the environment, especially on rich biodiversity and ecologically sensitive areas such as protected areas; tourism activities have to be in line with the protected area management plans that are currently being developed as permits and regulations established by government.

Cyprus

The Cyprus Tourism Organization drafted the **Cyprus Tourism Strategy 2011-2015** to distinguish and promote Cyprus' competitive advantages and successfully

reposition it on the tourist map, with the aim of providing a multi-dimensional and high quality tourism experience. As such, it focuses on product development, marketing, services and quality in all links of the tourism value chain, incorporating sustainability principles to respect and enhance the environment and culture. The aims of the Strategy are:

- An increase in total direct and indirect tourism receipts;
- An increase in arrivals ;
- Dealing with seasonality and subsequently the alleviation of the negative results it creates ;
- Improving the viability of tourism enterprises ;
- Upgrading the overall tourism experience offered by Cyprus by providing an enhanced tourist product with significant value added.

1.5.4. International Best Practices on Ecotourism

To better understand how the selected Best Practices (BPs) could be considered useful (innovative, impactful, creative, etc.) for this feasibility study, according to the scientific literature we have identified the *Main components that should describe an ecotourism product or activity in a natural area*. (Table 10).

The following tables (Tables 11-15) contain a selection of **16 best practices on ecotourism** related to the seven main components presented above.

Table 10. Components that describe an ecotourism product or activity in natural areas

	Component	Description
A.	Nature conservation	Understood as activities that bring benefits in terms of nature conservation. For example environmental education or volunteer programs.
B.	Cultural heritage	Understood as the preservation and promotion of tangible and intangible cultural heritage.
C.	Facilities, services and infrastructures	Understood as all the services and the infrastructures available for the visit of the tourists, to facilitate their enjoyment: transport infrastructure and mobility services, information services, guide services to visitors, services related to catering and accommodation.
D.	Management	Understood as plans and programs that affect natural areas or parts of them, as well as specific standards and regulations.
E.	Marketing	Understood as the commercialization methods used to promote and sell eco-tourism activities and products to different targets.
F.	Monitoring	Understood as the monitoring of tourism, of the tourists profile and of the impact of tourist visits on natural areas.
G.	Local communities	Understood both as the involvement of them, and at the same time as the beneficiaries of the BP actions.

Source: Adapted from The Mediterranean Experience of Ecotourism (MEET) project, 2014.

Table 11. Ecotourism best practices. Main component: Nature conservation

Marine safe-keeping and biodiversity	<i>Spain</i>
<p>This BP refers to the creation – by the Fundación Global Nature & Xaloc in Spain – of biodiversity friendly tourism products through the development of several targeted trainings and of a specific and innovative application for mobile devices, which allows tourists and entrepreneurs to collaborate on cataloguing the species. This application (available for free in the Apple store and Google Play) allows users to take pictures, set the geographical coordinates and open a form to fill out interesting facts about the sighting conducted (author, date and description). The photo data are sent to a remote data server that stores the information for approval and upload in an official database (in the case of this pilot project this is the Banc de Dades de Biodiversitat of the Generalitat Valenciana). This application can be customized to identify and catalogue in the same way species of interest (protected, endangered species, invasive species, etc.) in other protected areas, involving both tourism enterprises and tourists in an experiential and direct contribution to the conservation, in a participatory and playful way (“gamification”).</p>	
LAGOON - Preserving the Marine Environment of Oludeniz Lagoon	<i>Turkey</i>
<p>Oludeniz Lagoon is a very popular tourist area on the Mediterranean coast in Turkey. It is one of the few areas along the Turkish coast that has still a “clean” marine environment and several endemic species living there. To avoid the deterioration of the marine environment, the Turkish Marine Research Foundation (NGO) has set up, under a LIFE Project, environmental awareness Building activities among local fishermen, tourism operators and other important stakeholders through the promotion of workshops, campaigns (e.g. beach garbage collection, water quality monitoring, etc.), blue schools, and contests (e.g. underwater photography).</p>	
Conservation sailing holiday	<i>Greece</i>
<p>In the Ionian sea, a team of sailors, divers, biologists and environmentalists get together thanks to their love of the sea and nature, with the aim of protecting the marine ecosystem and raising public awareness on environmental issues. They developed a series of eco activities involving sailing, diving and discovering unique species in order to financially support their work for the rest of the year. When sailing boats are not chartered, the team sails around to clean beaches, recycle wastes or give a hand to researchers and organizations in their study activities.</p>	
PANACEA - environmental education centre dedicated to marine biodiversity	<i>Malta</i>
<p>This BP regards the institution in Italy and Malta of Environmental Educational Centres in several Protected Areas - the PANACEA (Promotion of Marine Protected Areas through Environmental Education) Centres - that are to be considered as portals of “edutainment.” These centres offer to the visitors a didactic experience through a kaleidoscopic overview of the marine life and habitats found in the six Marine Protected Areas included in the PANACEA project (Dwejra and Rdum Majjiesa in Malta, and Capo Gallo, Isole Pelagie, Plemmirio and Ustica in Sicily). These centres explain marine scientific issues adopting the so called “Layman’s system”, so that even visitors and students with little or no scientific background can comprehend the complexity of marine environments, their links with terrestrial ecosystems and the role of protected areas. The PANACEA environmental education centre at Dwejra, Gozo is the first centre dedicated exclusively to marine biodiversity on the island.</p>	

Source: Adapted from The Mediterranean Experience of Ecotourism (MEET) project, 2014.

Table 12. Ecotourism best practices. Main component: Cultural heritage

Culinarium Österreich	<i>Austria</i>
<p>The BP offers an example of trans-sector cooperation between tourism, commerce and agriculture sectors in order to promote Austrian rural areas, where a common supply and marketing cooperative group of each region leads to a unique culinary and tourist offer. Agriculture, tourism, industrial and commercial enterprises were able to create a shared culinary heritage-tourism experience. Culinary Austria includes high quality products and services of the Austrian regions. This BP is also representative of an effective market strategy.</p>	
ECOSAL Atlantis – Ecotourism in the Atlantic salt-marshes	<i>Spain, France, Portugal</i>
<p>The main goal of this BP is the development of joint and sustainable tourism based on the cultural and natural heritage of traditional Atlantic salt working sites, a heritage which has played an important role in the maritime history of Atlantic Europe. Operatively it consists in the creation of a route that integrates and enhances the value of Atlantic salt working sites.</p>	

Source: Adapted from The Mediterranean Experience of Ecotourism (MEET) project, 2014.

Table 13. Ecotourism best practices. Main component: Facilities, services and infrastructures

Information Point Network of the Natural Park of La Garrotxa Volcanic Zone	<i>Spain</i>
<p>This ongoing initiative aims to improve the training of staff, responsible for the customer service in tourism throughout the region of La Garrotxa, on the matters related to local tourism, establishing an integrated information network of high quality. Basically it is an accreditation system in which on one hand the companies are committed to attend regular training activities and to provide accurate information to its customers, and on the other, Turisme Garrotxa (an association of organizations and entities related to the tourism in the Garrotxa region) and the Natural Park are committed to providing such training, information materials and a proper distinction for the accredited companies. The ultimate result is that customers or users can have complete, accurate, consistent and high quality tourist information in accommodation, restaurants and tourism offices.</p>	
Development of the Feynan Eco-lodge	<i>Jordan</i>
<p>The BP refers to the realization of a fully operational eco-lodge generating alternative livelihoods for the local poor community and revenue for the Dana Biosphere Reserve (southern Jordan), helping to offset the threat of copper mining in the area. The Eco-lodge performs highly successful branding and marketing, such that in 2012 it was ranked in the top 4 hotels in Jordan by Trip Advisor and, in 2013, as one of the best 20 eco-lodges in the world by National Geographic. The facility directly provides jobs and income for 62 local people and their families; it has hosted 23,000 overnight visitors per year and has generated \$528,000 for supporting the conservation of the Biosphere Reserve (2012). The BP generates a positive impact for the lodge, the local people and the Reserve (it can be referred also to the Component D. Local Community).</p>	
House of "Aigoul"	<i>France</i>
<p>The BP consists in the coexistence, in the same eco-building located in the Aigoul mount in the French Cevennes National Park, of three different activities related to the Park: PA head office, tourism office, local farmer products store. The House becomes a meeting point for the tourists, a symbol of the commitment in the conservation by the PA, and a point of contact between tourists and the local community with its traditions and its typical products.</p>	

Source: Adapted from The Mediterranean Experience of Ecotourism (MEET) project, 2014.

Table 14. Ecotourism best practices. Main component: Management

Kayak and snorkel activities to discover Natural Park Spain	<i>Spain</i>
<p>This BP involves 4 different natural parks in Cataluña: Cap de Creus Natural Park, Aiguamolls de l'Empordà Natural Park, Delta de l'Ebre Natural Park and Montgrí, les Illes Medes i el Baix Ter Natural Park. It refers to kayak and snorkeling activities, offered as a way to enjoy natural areas while discovering some inaccessible spots along the coast; the visits are also aimed at learning – through thematic guided tours accompanied by guides from the Natural Parks – for instance the geology, the local wildlife or the marine biology. At the management level, the element to be underlined is a replicable coordination between different protected areas which, thanks to an active collaboration, are developing a unique product including joint actions for the fruition of the sites and for the product promotion (this also reduces costs arising from a fragmented promotion).</p>	
Development of an Ecotourism Strategic Plan – a pilot experience	<i>Tunisia</i>
<p>This BP is about the development of a participatory strategy and an action plan for eco-tourism in Maghreb natural protected areas, and the creation of guidelines for its implementation in two pilot areas: the Talassemtane National Park in Morocco, and Jebel Zaghouan National Park in Tunisia. The European Charter for Sustainable Tourism has been selected as a planning reference tool for sustainable tourism in the two protected areas. As a policy result, the Ministry of Environment in Tunisia applied this same methodology to a new eco-tourism project funded by the World Bank.</p>	

Source: Adapted from The Mediterranean Experience of Ecotourism (MEET) project, 2014.

Table 15. Ecotourism best practices. Main component: Marketing

Nature festival	France
<p>The Nature Festival is a cultural program that gathers more than 500 free activities in the Cevennes National Park (France) such as: naturalist hiking with rangers, excursions with scientists (botanic, wild life, architecture, landscapes, astronomy), artistic excursions (painting, photography, music in nature), conferences, shows, workshops (e.g. on how to build a wall with stones), concerts and exhibitions. The goal is to raise public awareness of natural and cultural heritage of the National Park. About 30,000 people per year and 250 people/organizations are involved in the Festival which is has been repeated with success since 1992.</p>	
The Pollino People Experience	Italy
<p>This BP consists in the promotion of this Italian Protected Area as a tourist attraction through the quality stories and the descriptions of the places by the people who live there, work there and who love it. Quality has been identified as the real key to promote the landscape and the tangible and intangible cultural heritage. The value of the Park is not transmitted TO the local community; it is transmitted BY the local community, as a «lively» place by 100 quality stories, 32 testimonials, an Italian and English website showing the testimonials through an interactive map which localizes them and an app for Smartphone and tablets.</p>	
“Buy a gadget and you will donate the park to everyone”	Italy
<p>This interesting BP is aimed to facilitate “green” mobility and free-of-charge tours within the Appia Antica Regional Park (Italy) for senior citizens (over 65) and/or people with motor disabilities, through electric vehicles purchased and maintained with the income generated by the selling to the visitors of gadgets and souvenirs. The claim used by the Park was “Buy a gadget and you will donate the park to everyone”.</p>	

Source: Adapted from The Mediterranean Experience of Ecotourism (MEET) project, 2014.

Table 16. Ecotourism best practices. Main component: Monitoring

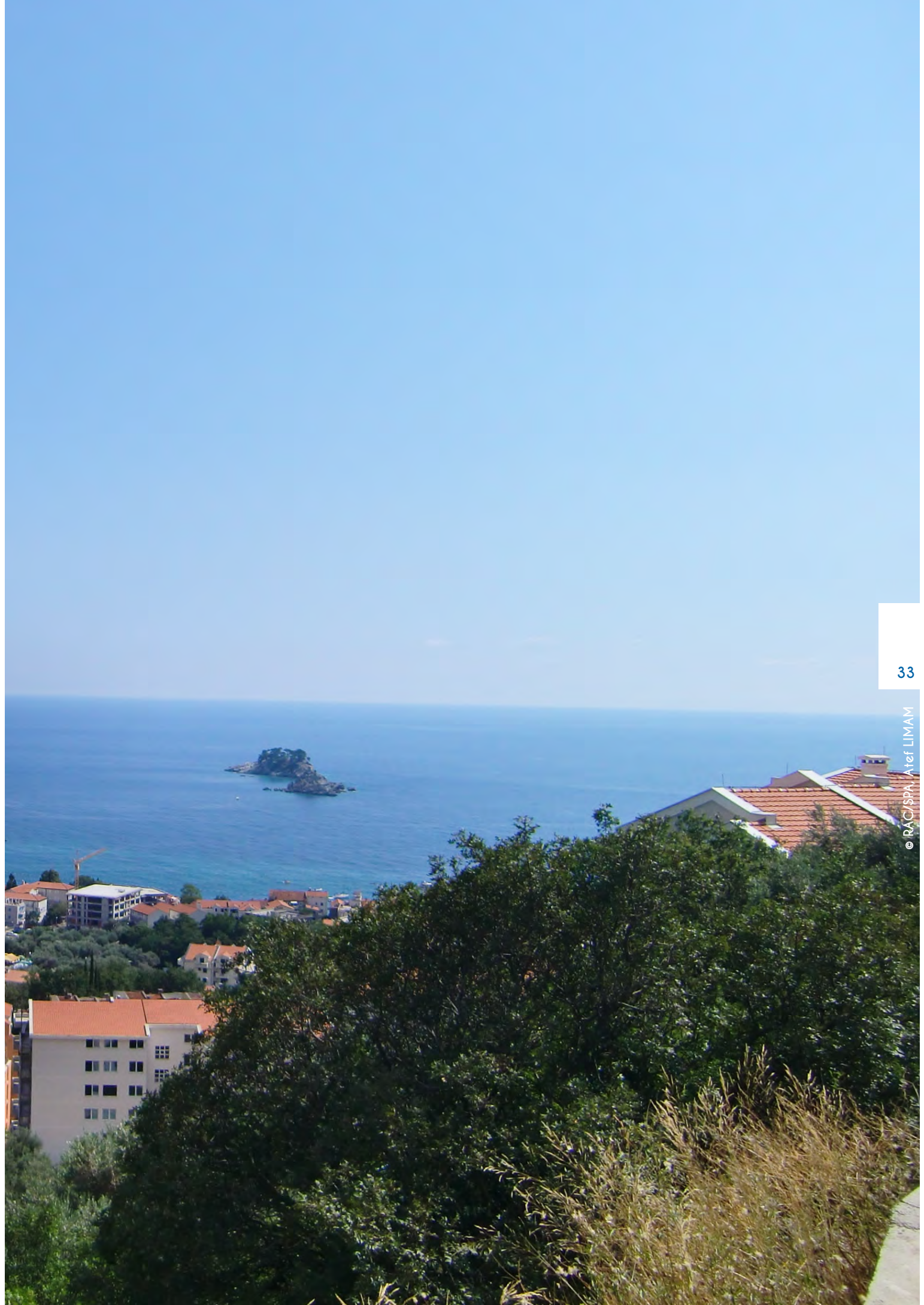
Using automatic counters and GPS technology for recreation monitoring: case of Sonian Forest	Belgium
<p>This BP refers to a pilot case of monitoring of the visitor number, behaviour and profile in the Sonian Forest (Belgium) with a model which integrates different methods for the collection of data, in relation to the needed information. Monitoring of tourist passes is performed at the main entrances of the Forest with some counters and field surveys, to understand visitor behaviour and profile; another activity is to track logs through the distribution of GPS devices to visitors, and face-to-face questionnaires.</p>	

Source: Adapted from The Mediterranean Experience of Ecotourism (MEET) project, 2014.

Table 17. Ecotourism best practices. Main component: Local communities

Fishing tourism	Spain
<p>This BP consists in encouraging the tourists to discover the natural values of the Catalan coastline, the sea and the traditional fishing activity promoting local fishermen as guides of their territory and bearers of local traditions. The local community of fishermen benefits from their usual activity with an extra money income and the tourists improve their visit appreciation in an experiential way.</p>	

Source: Adapted from The Mediterranean Experience of Ecotourism (MEET) project, 2014.





2. CONVENTIONAL TOURISM IN BOKA KOTORSKA: A QUICK VIEW AND ENVIRONMENTAL ASSESSMENT

It is not the main aim of this feasibility study to provide a full assessment of the conventional tourism sector in Boka Kotorska: that would take a full study itself. However, the authors of the study have found convenient to provide some **general insight on the current development of tourism in Boka Kotorska**.

2.1. Description of Boka Kotorska tourism sector

In Boka Kotorska tourism has been declared as a priority developing economy. In the recent decade, tourism

has evolved especially in the sea side region of Montenegro and now, according to Monstat (the Statistical Office of Montenegro, 2012) it is with 6,68 % involved in the national Gross Domestic Product.

The Department of Public Revenues (“Poreska Uprava”) published a tax report for 2011 where recovered taxes by municipal economies were presented.

According to this report, tourism and hospitality charged in total 23.758,414 € what is 13.8 % from the total recovered tax in Montenegro.

Table 18. Recovered Tax in the Tourism and Hospitality Service in Municipalities of Boka Kotorska and in Montenegro

	Herceg Novi	Kotor	Tivat	Total (Boka Kotorska)	Total (Montenegro)
Tourism and hospitality	12.323.160 €	4.292.270 €	7.142.984 €	23.758.414 €	172.268.624 €

Source: State income 2011; Department of Public Revenues

The number of tourism arrivals and overnight stays is considered a key indicator for accommodation statistics.

Table 19. Number of Tourism Arrivals in Municipalities of Boka Kotorska and in Montenegro

	Foreign	Domestic	Total	Structure
City	(1)	(2)	(3)=(1)+(2)	(3) in %
Herceg Novi	187546	41517	229063	15,9
Tivat	38033	6012	44045	3,1
Kotor	52058	3993	56051	3,9
Total Boka Kotorska	277637	51522	329159	22,9
Total MNE	1 264 163	175 337	1 439 500	100,0

Source: Tourist arrivals and overnight stays 2012, Monstat

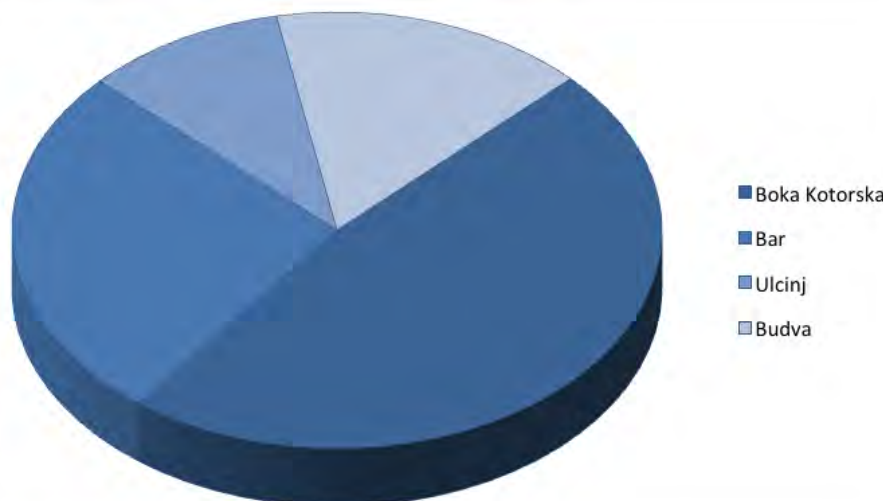
Table 20. Number of Overnight Stays in Municipalities of Boka Kotorska and in Montenegro

	Foreign	Domestic	Total	Structure
City	(1)	(2)	(3)=(1)+(2)	(3) in %
Herceg Novi	1474370	343064	1817434	19,9
Tivat	371373	18439	389812	4,3
Kotor	284901	18999	303900	3,3
Total Boka Kotorska	2130644	380502	2511146	27,4
Total MNE	8 143 007	1 008 229	9 151 236	100,0

Source: Tourist arrivals and overnight stays 2012, Monstat

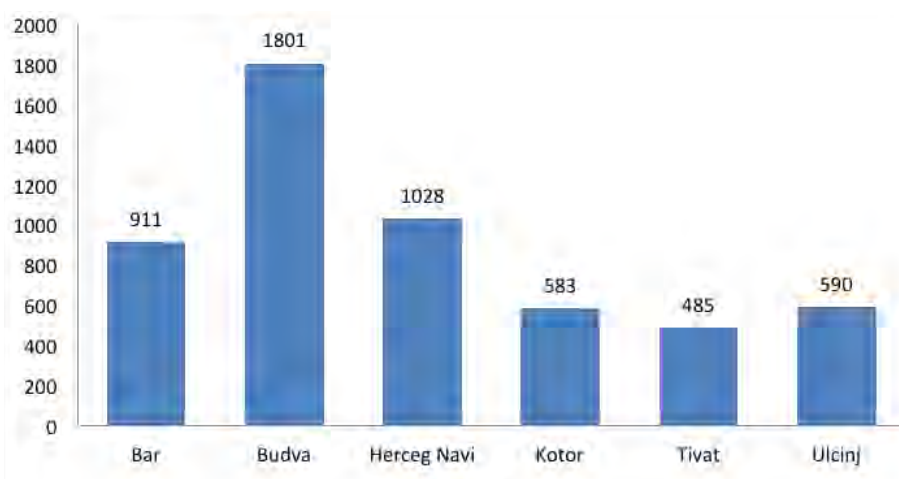
If we compare tourist arrivals and overnight stays in the cities of the seaside region, it can be concluded that majority of tourist arrivals and overnight stays are made in Budva. Second place of the tourist arrivals and overnight stays is made in the city of Herceg Novi, in Boka Kotorska region. Tivat and Kotor are located last on the list with 4,3 % and 3,3 % of involvement in the total tourist arrivals and overnight stays.

According to the Monstat population census of 2011, In Boka Kotorska 2.096 persons (9,1 % of total employed) are employed in tourism and hospitality industry. The highest employment in the tourism and hospitality industry is in Herceg Novi with 1.028 people which makes it little less than 50 % from the entire population in Boka Kotorska employed in tourism.



Source: Tourist arrivals and overnight stays 2012, Monstat

Figure 2. Number of Employed Persons in the South Part of Montenegro in the Area of Tourism and Hospitality



Source: Tourist arrivals and overnight stays 2012, Monstat

Figure 3. Number of Employed Persons in the Coastal Area of Montenegro in the Area of Tourism and Hospitality

World Travel & Tourism Council issued a report on Economic Impact 2014 for Montenegro where data's for tourism key facts are presented. The following data posted in this document are the following:

- The direct contribution of Travel & Tourism to GDP was EUR 348.7 mn (9.8 % of total GDP) in 2013, and is forecast to rise by 12.6 % in 2014, and to rise by 8.6 % pa, from 2014-2024, to EUR 892.4 mn (17.7 % of total GDP) in 2024 ;
- The total contribution of Travel & Tourism to GDP was EUR 714.2 mn (20.0 % of GDP) in 2013, and is forecast to rise by 13.2 % in 2014, and to rise by 8.8 % pa to EUR 1,877.3 mn (37.2 % of GDP) in 2024 ;
- In 2013 Travel & Tourism directly supported 14,500 jobs (8.8 % of total employment). This is expected to rise by 14.0 % in 2014 and rise by 5.9 % pa to 30,000 jobs (16.1 % of total employment) in 2024 ;
- In 2013 Travel & Tourism directly supported 14,500 jobs (8.8 % of total employment). This is expected to rise by 14.0 % in 2014 and rise by 5.9 % pa to 30,000 jobs (16.1 % of total employment) in 2024 ;
- In 2013, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry, was 18.3 % of total employment (30,500 jobs). This is expected to rise by 14.4 % in 2014 to 35,000 jobs and rise by 6.2 % pa to 64,000 jobs in 2024 (34.5 % of total);
- Visitor exports generated EUR 699.8 mn (51.4 % of total exports) in 2013. This is forecast to grow by 10.0 % in 2014, and grow by 7.9 % pa, from 2014-2024, to EUR 1,641.0 mn in 2024 (50.9 % of total) ;

- Travel & Tourism investment in 2013 was EUR 208.3 mn, or 28.0 % of total investment. It should rise by 14.3 % in 2014, and rise by 8.7 % over the next ten years to EUR 549.6 mn in 2024 (52.3 % of total).

2.2. Tourism planning and strategy in Boka Kotorska

Being tourism a relevant economic sector in the region, both local and national governments have dedicated efforts to define strategies and plans to improve tourism quality in the region, thus enhancing the positive effects of this activity on local communities and minimising its negative effects. This section describes the National Tourism Development Strategy to 2020, as well as the local spatial and action plans and how they deal with ecotourism. Other National strategies and future projects and investments in the region are also described.

2.2.1. The Montenegro Tourism Development Strategy to 2020

In 2003, the Montenegro Ministry of Tourism and Environment issued a **Touristic Masterplan for Montenegro**⁽¹²⁾, and in 2008, it was updated through the **Montenegro Tourism Development Strategy to 2020**⁽¹³⁾. According to this strategy, "tourism is of inestimable importance for Montenegro. It bears on every aspect of our society, our economic development, standard of living and the Montenegrin way of life. It creates jobs and brings economic prosperity". Furthermore, tourism contribute to regional/ rural development (by keeping people in the villages and mitigating the problem of «ageing» of the villages through the development of agriculture and forms of tourism related to countryside and agriculture - agro-tourism, eco-tourism and countryside tourism).

⁽¹²⁾ Touristic Masterplan for Montenegro available in English: <http://www.visit-montenegro.com/downloads/ministryoftourism/1-MASTER-PLAN/DEG%20EN%20ExecSumm.pdf>.

⁽¹³⁾ Montenegro Tourism Development Strategy to 2020, available in English: <http://www.mt.gov.me/en/library/strategije>.

Montenegrin Tourism Development Strategy to 2020 predicts that by 2020 Montenegro will become a destination with all-year-round tourism. Main strategic goal to 2020 is “by applying sustainable development principles and objectives, Montenegro will create a strong position of a global high quality destination; tourism will provide to Montenegrin citizens enough jobs and increasing living standards, and the government will have stable and reliable revenues”.

Priorities of the Montenegro Tourism Development Strategy to 2020 in the area of sustainable tourism are:

- a) diversification of tourist offer (development of village, agro-, eco-, mountain, cultural, sports and other forms of tourism, especially in the northern part) in support to the extension of the tourist season and attraction of guests with higher purchase power ;
- b) integration of sustainability criteria in sanctioning tourism development projects (i.e. for the adoption and assessment of plans), especially when it comes to coastal and winter mountain tourism.

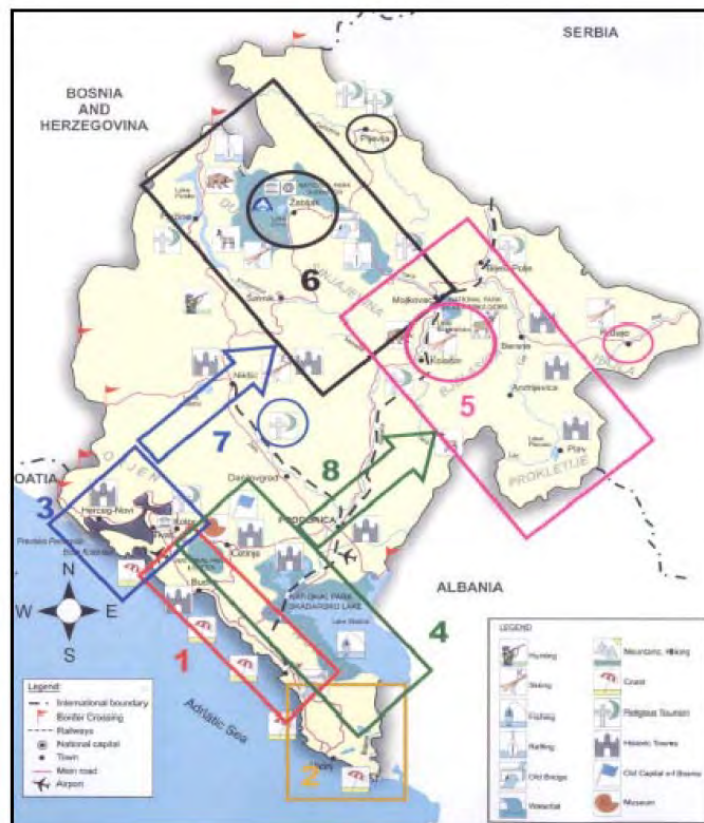
However it does not actually use the term “ecotourism”, the Montenegro Tourism Development

Strategy to 2020 identifies activities related to ecotourism, mainly focused for the costal and mountain region of Montenegro. They are:

- Hiking ;
- Biking (Especially mountain biking);
- Climbing ;
- Agro-tourism (example - in the area of Piva and Komarnica) ;
- Sightseeing of natural resources, biodiversity and ecological specific characteristics that mountains, rivers and lakes offer, and especially National Parks Biogradska gora and Durmitor.

The Strategy also defines the concepts of “Wild beauty resort” and “eco-lodge”.

The Strategy defines six main strategic priority touristic clusters in Montenegro, four in the south (one of which is Boka Kotorska) and two in the north. Two tourism corridors would help bridging the distance between the two groups of clusters (see map below).



Source: Montenegro Tourism Development Strategy to 2020

Map 3. Touristic clusters in Montenegro

2.2.2. Local spatial and action plans

According to the Law on Local Self Government and Law on Regional Development, every municipality of Montenegro is required to prepare and edit its local action plan that will define goals in specific areas of development.

The Municipality of Tivat in 2012 adopted for the first time a local action plan. This document describes and articulates, in a clear and dynamic way, the development action plan for a period of five years. **Spatial plan of municipality of Tivat** defines the following main economies:

- Tourism and hospitality ;
- Nautical tourism, marines and yacht repairs ;
- Transportation - air, land, naval and passenger transportation ;
- (Organic) agriculture - olive growing, vinery, growing citrus fruits, growing fruits, agriculture products and mariculture.

Having tourism and hospitality industry as one of the main economy in the municipality of Tivat, it will be maintained by constructing new and reconstruction of the current hotels on the locations: Župa, Bay Trašite, Plavi Horizonti (*eng.* Blue Horizons) and second stage in the Island of Flowers. Construction in the private accommodation will be continued in the Municipality of Tivat even though the current offer of private accommodation is made without any following spatial plans brought so far, is often low quality and offers only the basic service of accommodation.

According to the spatial plan of Tivat, hill Vrmac is defined as a place for the development of rural tourism and ecotourism. This area has a huge potential but reconstruction is necessary. Now it is characterized by abandoned villages which used to be economical and administrative center in the past. After reconstruction of these locations local population will return at their born places which will become the base of tourist offer in the area for ecotourism or tourism in general. Investment and development of organic agriculture in the hill Vrmac will help diversify tourism offer of Boka Kotorska Bay area.

On the previous location of salt pans in Solila, today is the habitat of many bird species especially during the winter season. This opportunity can be used for a type of ecotourist offer: bird watching.

In December 2013, Municipality of Kotor introduced Strategic development plan for the period 2013- 2017. When it comes to tourism, main problems are: imbalance between hotel and private accommodation sector, poorly developed supporting infrastructure (water pipeline, transportation infrastructure and no existence of sewage system), poor functional and technical condition in big hotels (hotel Teuta in Risan and Vrmac in Pricanj). On the other side, increase in service quality in small hotels has

been noted. When it comes to types of tourism, this plan defines excursions, yachting and cruising tourism as one of the potentials for development. Therefore, as priority measures in area of *Development of economic activities*, are stated:

- Development of excursion, marine, event and sport tourism ; and
- Development of rural tourism.

Protection and valorisation of cultural and natural heritage and living environment has been identified as one of the priority, too, and the related measures are following:

- Protection and valorisation of cultural heritage and living environment ;
- Integral protection of cultural heritage and living environment though constant control of local urban development ;
- Use of renewable source of energy and improvement of energy efficiency ;
- Biodiversity protection.

According to the **Spatial plan of municipality Herceg Novi**, last decade of the 20th century was defined by large number of accommodation capacities in comparison to the total accommodation capacities in Montenegro. Today the situation remains different. Even though this municipality has a large number of accommodation capacities, the quality of such capacities is very poor. Based on current touristic offer, set of weaknesses have been defined in the spatial plan of municipality Herceg Novi, and those are:

- Insufficient accommodation promotion on the foreign markets ;
- Lack of different types of tourism such as nautical tourism, tourism for older generations, walking tourism, cycling tourism, hunting tourism, rural tourism and mountain tourism ;
- Poor cooperation with foreign tour operators and travel agencies.

When it comes to natural resources preservation in the municipality of Herceg Novi, spatial plan defined following set of problems:

- Difficulties in bio-environment and current natural protected areas preservation due to increased number of construction sites ;
- Lack of drinking water ;
- Poor waste water disposal system and high amount of sea polluters ;
- Increased danger from fires ;
- Endangering current natural protected areas ;
- Endangering agriculture land.

2.2.3. Other National strategies, plans and laws

The Ministry for Economic Development published a **National Spatial Plan for Montenegro until 2020**. This plan states that tourism has a recognizable regional differentiation in the national economy, and the need for balancing tourism development with social and ecological requirements is a condition for all regions:

- All investments applications in larger tourism facilities have to be in line with expected assessments of sustainable development, with expected economic impact on region and complete social impact.
- In protected or planned protected areas, investment in new, additional or extension of existing tourism facilities (hotels, marinas, skiing infrastructure, etc.) can only be conducted on the base of spatial and urban plans for the respective area.

National Strategy of Sustainable Development of Montenegro (NSSD)⁽¹⁴⁾, issued by the Ministry of Tourism and Environmental Protection in 2007, was based on the principles and recommendations stated in the Rio Declaration and Agenda 21, as well as in the Declaration and Implementation Plan from Johannesburg. NSSD Montenegro is also harmonized with the Mediterranean

and EU Strategy of Sustainable Development and with the Lisbon process. Montenegro was the first State to be declared an Ecological State in Europe, in 1991.

When it comes to the preservation of cultural sites there is a **Law on Reconstruction of Kotor Heritage Site**⁽¹⁵⁾. When it comes to the environment protection, the Parliament of Montenegro passed the **Law on Environment on 29 July 2008**⁽¹⁶⁾. In particular the Strategy of Biodiversity and Action Plan from the Montenegrin Ministry of Spatial Planning and Environmental Protection in collaboration and the Institute for the Protection of Nature of Montenegro is very important for biodiversity protection.

Economic commission for Europe, committee on environmental policy published environmental **performance reviews on Montenegro in 2007**⁽¹⁷⁾.

2.2.4. Future investments and tourism projects in Boka Kotorska

Alongside with the tourism planning in the region, some relevant future investments and tourism projects in the region are underway, as stated in the Table 21. Noteworthy, no information on future investments regarding ecotourism initiatives, events or infrastructures has been identified so far.

Table 21. Future investments and tourism projects in Boka Kotorska

Porto Montenegro in Tivat	Porto Montenegro is a full service luxury yacht marina located in the Bay of Kotor offering berths, luxury residences, boat refit & repair services, captain & crew facilities It will have 250 berths, short and long term berth lease, on site customs and immigration, on site provisioning and bonded warehouse, crew-training centre... According to the report on the Strategic Environmental Assessment of Environmental Impact of this project, only minor impacts can be expected, and they are of limited intensity and spatial scale. On the other hand, the positive effects of such planning solutions are far more important and will have very significant impact on the socio - economic environment, not only the town of Tivat, but the entire Montenegro. This investment allows the establishment new, highly profitable sector of nautical tourism, which will afford more opportunities for employment, and bring more people in Tivat.
Azmont Investments in Herceg Novi	Azmont Investment project is located in Kumbor, near Herceg Novi, only 45 minutes from Dubrovnik and Tivat airports. This is a privately owned Montenegrin company; with financial investment from Azerbaijan. It is set to be the largest tourism investment in Europe. The project will cover approximately 190,000 m ² of construction -147,000 m ² above ground, and another 40,000 m ² underground. It will include Europe's first One & Only Hotel, One & Only Branded Residences, One & Only Pier, Destination & Wellness Spa with Penthouse Apartments, Luxury Villa, Residences, Marina, waterfront with extensive squares and waterside cafes, over 100 shops, bars, cafes & restaurants, botanical garden, Community center, Conference center, etc.
Qatari Diar Hotels and Property Investments in Tivat	Qatari Diar Hotels and Property Investments plans to invest € 250 m in a new luxury resort near Tivat. Qatari Diar's local unit said it will redevelop a 24 ha site with a luxury hotel, villas and apartments, sports facilities, shopping malls and restaurants. The project follows the purchase of an existing hotel near Tivat and will be among the largest direct foreign investments in tourism in Montenegro and contribute to positioning the country as a high-end tourism destination.

⁽¹⁴⁾ More information here: http://www.uncsd2012.org/content/documents/Montenegro_National%20Strategy%20of%20Sustainable%20Development%20of%20Montenegro.pdf

⁽¹⁵⁾ More information here: <http://www.questionnaire.gov.me/Annexes/Annex198.pdf>

⁽¹⁶⁾ More information here: <http://www.questionnaire.gov.me/Annexes/Annex060.pdf>

⁽¹⁷⁾ More information here: http://www.unecce.org/fileadmin/DAM/env/epr/epr_studies/montenegro.pdf

<p>Luštica Bay in Tivat</p>	<p>Luštica Bay will feature with over 500 residential villas and townhouses, over 1000 apartments, 7 hotels, 2 marinas, an 18-hole golf course, spas and wellness centre, conference centre, etc. It terms of environment protection, this project was designed, constructed and operated with anything other than the utmost respect for the environment. Such dedication for the environment has been awarded with LEED silver certification (Leadership in Energy and Environmental design) making it first residential project in Europe to achieve this. This means: minimal environmental impact, energy efficient architecture and planned living environment.</p>
<p>)))Golf course in Tivat</p>	<p>This will be the only golf course in Montenegro, located in Luštica Bay, on a stretch of land 1.8 km long, 2 km outside Tivat and only 700m from the sea. The report on the Strategic Environmental Assessment on Environmental Impact of this project considers that the impact of this facility will be reduced and even positive for certain areas such as the water treatment infrastructures⁽¹⁸⁾.</p>
<p>Cable car between Kotor and Cetinje</p>	<p>Original project was constructed in the 1916 for the purpose of cargo transportation and was used until 1919. Today it will be the only cable car in the world that is connecting two cities – Kotor and Cetinje. This project was presented in the summer 2013 by the side of municipalities of Kotor and Cetinje, Ministry of Sustainable Development and Tourism and European Bank for Investment and Development. Entire project is worth of 46,5 million of Euros. Cable car will be 15 km long and will have 4 stops (Dub, Kuk, Lovćen and Cetinje). According to the feasibility study performed by one Italian company, return period for this investment should be 10 years. Considering the fact that Kotor visits approximately 350 large cruisers a year, there should be approximately 115 to 220 people using this cable car every day and bring a revenue from 4,5 million Euros for the first year⁽¹⁹⁾.</p>

Source: Compiled by authors

2.3. Transport to Boka Kotorska

Since centuries ago, due to its strategic situation in the Adriatic Boka Kotorska has been a communication hub between East and West, as the rich cultural heritage of the region proves. This section describes the transport infrastructure of Boka Kotorska, thanks to which any traveller can reach the Bay by air, land or sea.

2.3.1. Road infrastructure

The main road in the area is the one that goes along the coast and connects Montenegro and Croatia. This road is part of the Adriatic motorway, a road that stretches along the eastern coast of the Adriatic Sea and is part of the European route E65. The road passes principally through Croatia, with smaller stretches through Bosnia and Herzegovina and Montenegro. It is still a two-lane road for almost its entire length, with the exception of a short dual-carriageway expressway in middle coastal area Croatia and some part of coastal areas in Montenegro⁽²⁰⁾. In Boka Kotorska, Adriatic motorway goes along the coastline and usually serves as a line to distinct coastal region and mountain region of Boka Kotorska. Adriatic motorway is presented in the picture up with the green line.

Besides the Adriatic motorway, there is also new road Risan - Žabljak that connects Boka Kotorska bay area with northern part of Montenegro. Until few years ago, when



Map 4. Main road infrastructure in Montenegro

tourists wanted to go from Boka Kotorska in the northern region, they had to go across Podgorica and Nikšić (in the picture it is marked with green line). This new road Risan - Žabljak, reduces the traveling time and km approximately by two hours or 93 km (in the picture it is marked with red line). Motorway Risan - Žabljak is spread across 98 km though beautiful scenery of the mountainous part of Montenegro.

⁽¹⁸⁾ More information here: http://http://opstinativat.com:cg/images/stories/Vijesti:DOKUMENTA:2013:Okt_Nov:sea%20-%20dup%20golf%20ekonomija%20nacrt.pdf

⁽¹⁹⁾ Ministry of Sustainable Development and Tourism

⁽²⁰⁾ Radimir Čačić (November 2006). «Adriatic-Ionian Transport Corridor on the territory of the Republic of Croatia»: <http://www.ref-see.org/pdf/Radimir%20Cacic.pdf> (PDF) Regional Economic Forum Southeast Europe. Retrieved September 8, 2010

According to the Transportation Office, part of Ministry for Transportation and Maritime Affairs, this new motorway should increase the flow of people and tourist in general from the neighbouring countries such as Serbia, Bosnia and Herzegovina and Croatia.

Another important transportation infrastructure project, funded by the European Development Bank, is the construction of the bypass road that will help reducing traffic flow noise and exhaustion gases near the old town Kotor. According to the representative from Municipality of Kotor, this project has a great significance considering it will help in preservation of the old town.

In the previous years, increased numbers of tourists are visiting Montenegro by bike. However, there are no bike lines planned along the main road so cyclists drive along the motor roads. Some experts consider Montenegro's roads to be perfect for this type of driving but so far, there are no lanes or resting places for drivers.

2.3.2. Naval Transportation

When it comes to the naval transportation in Boka Kotorska, it is important to mention ferry Kamenari-Lepetani (Verige strait) which goes on every 10 to 30 minutes depending from the season, and allows connecting two sides of the Bay (from Herceg Novi to Tivat) without having to drive all around the Kotor-Risan bay.

The port of Kotor is located in the south-eastern top of the bay. Kotor has a status of a permanent maritime border crossings and ports for international maritime traffic, as stated in the table 22.

Table 22. Distance of the most important ports from the port of KotorKotorska

	km
Kotor – Bar	42
Kotor – Bari	125
Kotor – Otrant	151
Kotor – Trst	334
Kotor – Ancona	254
Kotor – Pirej	715
Kotor – Dubrovnik	40

Source: Port of Kotor

Kotor Port is located close to the main road and it is associated with places along the coast, as well as cities in the interior. The length of operating banks, which owns the Port of Kotor in the harbour is 665m, of which 512m is located

in the western part while the 153m facing the river Skurda. During 2008, in the port of Kotor arrived 228 cruisers with 52,739 passengers on board. In 2009 the activities that took place in nautical ports (marinas) in Montenegro, achieved a significant increase in traffic of vessels and passengers. In the port of Kotor arrived 262 foreign cruisers, which is 9.38 % higher than the previous year, with 74,177 tourists on board, as much as 39.94 % compared to 2008.

There are seven marinas in the Boka Kotorska bay area:

- Marina Herceg Novi ;
- Marina Meljine-Herceg Novi ;
- Marina Zelenika- Herceg Novi ;
- The Port of Kotor ;
- Marina Risan ;
- Marina Kaliman- Tivat; and
- MC Porto Montenegro – Tivat.

2.3.3. Air transportation

There are two airports in Montenegro: Podgorica and Tivat.

Podgorica Airport is 90 km (106 minutes) away from the city of Kotor. This small airport is open for public with numerous international flights to several other European destinations: Vienna, Zürich, Frankfurt, Rome, Copenhagen, Skopje, Zagreb, etc. Companies that are using this airport are: Air Serbia, Montenegro Airlines, Turkish Airlines, Austrian Airlines, that route to Vienna, Beograd, Istanbul, Rome, Paris, Moskov, Zurich, Frankfurt, Ljubljana. This airport offers the services of *many rent* a car agencies and taxi transportation companies.

Tivat Airport is 6,7 km (8 minutes) away from the city of Kotor. This small airport is open for public with regular flights to several European cities, such as Moscow, Belgrade, Paris, London and Kyiv. Person can reach this airport by bus or taxi service. Companies that are using the airport are: Air Serbia, Montenegro Airlines, Globes Airlines, Ural Airlines and Moskovia Airlines.

There are two airports located in the neighbouring countries: in Dubrovnik, Croatia (from Herceg Novi 30 km) and in Tirana, Albania (from Tivat 153 km). Existence of these airports is very important for this region because it connects Boka Kotorska with other destinations that have no direct flight line to Tivat or Podgorica. The airport of Dubrovnik, in addition, hosts some low-cost companies.

2.3.4. Railway Transportation

Railway Bar - Belgrade is the only railroad that connects the coastal area of Montenegro with the north of Montenegro and later on with Serbia. Railway starts in Bar and passes through the following cities in Montenegro -

Podgorica, Kolašin, Bijelo Polje, and prolongs to Belgrade (Serbia). Trains are going from Bar or any other city in Montenegro to Serbia, twice to four times a day depending of the schedule.

2.4. Demand: tourist profile/travel motives

According to the Monstat (Montenegrin National Statistical Agency), majority **foreign tourist in Montenegro** (2012) is from Serbia (28.9 %), Russia (24.4 %), Bosnia and Herzegovina (8.3 %), Ukraine (4.3 %), Kosovo (3.1 %), Poland (2.4 %), Germany (2.3 %), and Czech Republic (2.1 %). There are not precise information about the structure of foreign tourist as well as their travel motives in Boka Kotorska.

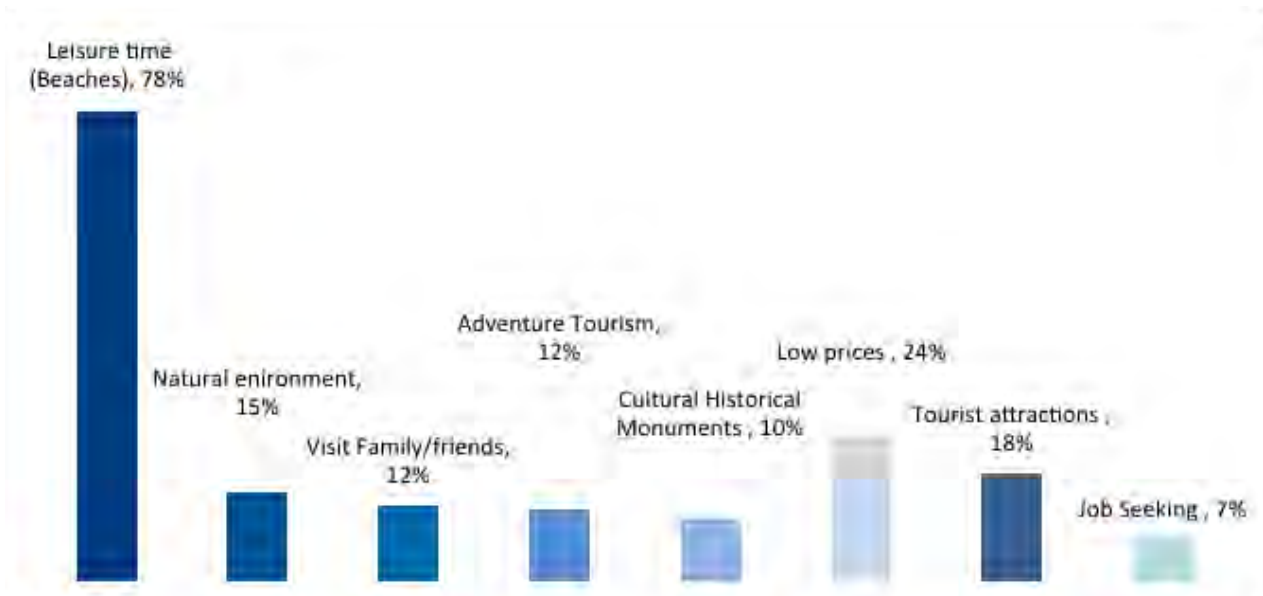
The only data available are from study prepared by Centre for Sustainable Tourism Initiatives in cooperation with CEED which performed a research on the touristic experiences in the Northern and Southern region of Montenegro⁽²¹⁾. The survey was conducted during August and September 2007 and published in December 2007. This survey was performed on the sample of **1.010 participants made from foreign tourist** (49.8 % were visiting the northern side and 50.2 % were visiting southern side of Montenegro). In the survey performed in the south of Montenegro, 39.6 % of tested respondents were visiting Boka Kotorska region mainly municipalities of Herceg Novi and Kotor.

According to the survey results, majority (32.7 %) of the tourist were staying in Montenegro for the period of 10 days, 28.8 % were staying more than 10 days and 23.3 % between 5 and 9 days. When it comes to accommodation, 25,1 % decided for private accommodation, 17,8 % decided for hotels, 14,7 % decided for camp sites and the rest had available family or friends houses. Southern part of Montenegro was visited slightly more by men (53.6 %) than women (46.6 %). Regarding the age structure, more than half of respondents had more than 40 years (59.0 %).

Majority of tourist tested in the southern region decided to visit Montenegro for the purpose of leisure time (77.5 %) specifically for beaches, natural environment (14.6 %), family/friend visits (12.4 %), adventure tourism (11.8 %), cultural-historic monuments (10.3 %) and the purpose of job seeking (6.9 %). As a reason for choosing Montenegro as a travel destination mainly were low prices (24.1 %) and Montenegrin tourist attractions (17.6 %).

Tourists visiting the Southern Region of Montenegro were attracted by the natural surroundings.

Almost two fifths of respondents (37.3 %) named beaches as their main attraction to Montenegro, followed by natural scenery (14.6 %), visiting family/friends (12.4 %), adventure tourism (11.8 %), culture/history 10.3 % and business (6.9 %). Tourists from Serbia and other countries in the region overwhelming named beaches as their main attraction, while tourists from the European Union named beaches (28 %) followed closely by culture/history (24 %) and natural scenery (22 %).



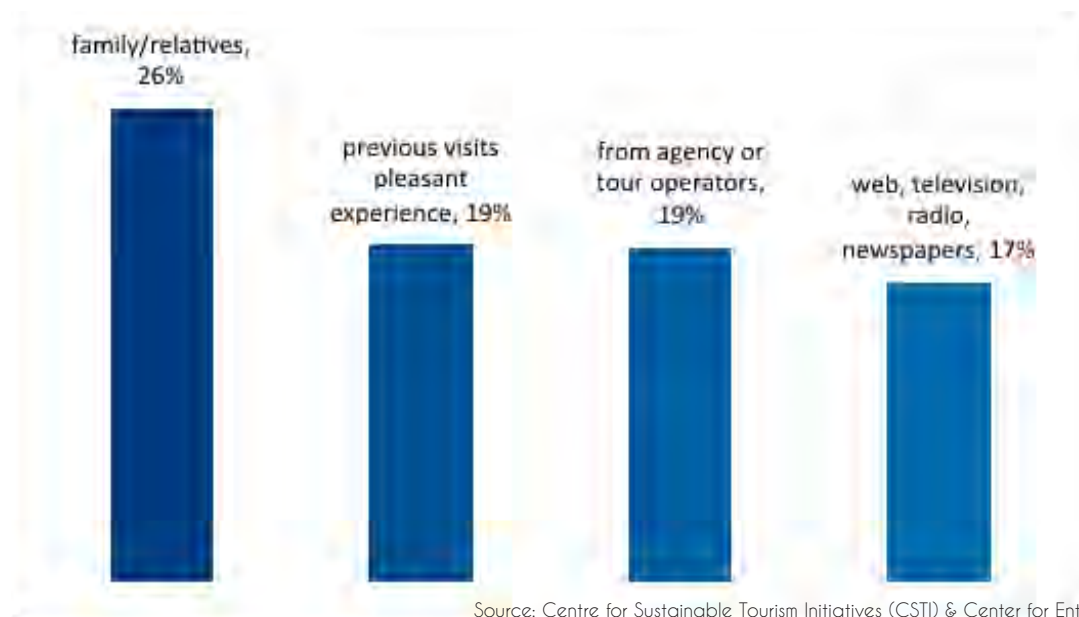
Source: Centre for Sustainable Tourism Initiatives (CSTI) & Center for Entrepreneurship and Economic Development (CEED) (2007). *The Experience of Tourists in Northern and Southern Montenegro*

Figure 4. Tourist's motivations to visit Montenegro

⁽²¹⁾ Research is available here: http://www.cstimontenegro.org/CSTI-Istrazivanje_o_iskustvima_posjetilaca-g-332

As a main source of information on Montenegro, 26.2 % of respondents said they got from family/relatives, 18.7 % previous visits and pleasant experience, 18.5 %

from agency or tour operators while only 16.6 % received information using internet, television, radio and newspapers.



Source: Centre for Sustainable Tourism Initiatives (CSTI) & Center for Entrepreneurship and Economic Development (CEED) (2007). *The Experience of Tourists in Northern and Southern Montenegro*

Figure 5. Sources of information about Montenegro

2.5. Market assessment: products, supply and trends

Accommodation service sector is well developed in Boka Kotorska region. In total, there are 310 business facilities

for the purpose of providing accommodation. Majority is located in Herceg Novi and Kotor. When it comes to the number of rooms, Herceg Novi has majority of accommodation rooms as well as number of private accommodation. Characteristics of the tourism supply in Boka Kotorska are described in the Table 23.

Table 23. Accommodation Capacities for Municipalities of Boka Kotorska and Montenegro

	Number of business facilities	Number of rooms	Number of beds	Number of private accommodation
Kotor	25	4.098	9.506	1.069
Tivat	18	3.342	7.901	635
Herceg Novi	30	13.191	35.914	2.477
Total (Boka Kotorska)	73	20.631	53.321	4.181

Source: Accommodation capacities by municipalities and types of facilities, August, 2011, Monstat.

If we observe the Table 24, we can conclude that Kotor is the primary touristic municipality in Boka Kotorska

with one five star hotel “Vardar” located in the heart of the old town Kotor.

Table 24. Structure of Leisure Service in Municipalities of Boka Kotorska

	Number of stars	★★★★	★★★	★★	★
Tivat	Number of hotels	0	4	9	9
Kotor	Number of hotels	1	13	9	1
Herceg Novi	Number of hotels	0	5	3	4

Source: Strategic action plans of municipalities Tivat, Kotor and Herceg Novi

Boka Kotorska offers a wide variety of restaurants serving both local and international food. Most famous restaurants of Montenegrin cuisine are Čatovića Mlini in Morinj and Stari Mlini in Ljuta, near Kotor. Taste of Mediterranean lies the holy trinity - fish, wine and olive oil and is accompanied by local wines.

Due to favourable climate and beneficial geomorphology, several types of tourism (currently developed and those that have chance to develop in future) had been identified (besides ecotourism) in Boka Kotorska.

Table 25. Types of tourism in Boka Kotorska (besides ecotourism)

TYPE OF TOURISM	DESCRIPTION
Leisure tourism	Includes tourist overnight stay for the purpose of relaxation, adventure, sightseeing, sports, etc. Leisure tourism includes all types of tourism organized in Boka Kotorska. This type of tourism relies on the foundation of the accommodation capacities in Boka Kotorska. Presence of this type of tourism can be measured by the number of overnight stays.
Beach tourism	A classical type of tourism spread across entire of Montenegrin sea side. Due to the area characteristics and nearness of the mountain, beaches in Boka Kotorska are mainly made of concrete platform with pool ladders, especially near Kotor. Beach tourism is used in this region just as a supporting tourism branch which will help making it more appealing to tourists who are mainly interested in other forms of tourism. The entire Montenegrin coast is 293 km long with 73 km of beaches spread over 117 locations. There are several different type of beaches - sand, pebble or rock beach, with modern amenities or a virgin rustic one, etc. In Boka Kotorska bay area, they are : Tivat: Oblatno; Krasici; Plavi Horizonti; Saint Marko; The Island of Flower; Zupa; Belane; Seljanovo; Donja lastva; Opatovo. Kotor: Bigovo; Trsteno; Zukovo; Markos bay; Orahovac; Tower of Bajo; Risan; Morinj. Herceg Novi: Kumbor; Igalo; Rose; Mirista; Zanjice.
Sports tourism	One of the priority tourism branch according to the tourism Master Plan of Boka Kotorska 2020. For this purpose, several basketball and football courses had been constructed as well as closed swimming pools mainly intended for Water Polo.
Golf Tourism	As part of its quality and all-year tourist strategy, according to the Montenegro Tourism Strategy to 2020, Montenegro cannot afford to do without golf. The regional master plan for the Boka Kotorska and Ulcinj-Velika Plaža already plans golfing amenities and the Porto Montenegro also plans to set up a golf course. Cross-border cooperation with Dubrovnik-Konavle has been proposed for the Boka to share the investment risks and be able to enter the market with a broader assortment of facilities from the outset. The draft spatial development plan for the coast also cites golf as one of the development measures. Lastly, an important project is the construction of the only golf course in Montenegro. It is located on a stretch of land 1.8 km long, situated in Kavac, 2 km outside Tivat and only 700 m from the sea. The project is expected to become a regional driving force for the tourism industry and to extend the tourism season. Environmental concerns over the use of land for golf courses have grown over the past fifty years. Specific issues include amount of water required for irrigation and the use of chemical pesticides and fertilizers in maintenance, as well as the destruction of wetlands and other environmentally important areas during construction. Building golf courses is aimed at much smaller target groups than constructing biking and hiking trails. It targets Central Europeans with high-income and high quality demands, however, a group that Montenegro would like to attract and it needs for extending the bathing season. Of all European golfers, 67 % come from 4 countries: the United Kingdom, 31 %, Sweden, 15 %, Germany, 12 %, France, 9 %.

Cultural tourism	Cultural richness in Boka Kotorska is very rare: roman mosaics in Perast, orthodox churches from the middle age, remains from the Republic of Venice and <i>Habsburg Monarchy</i> , etc. Kotor has been included in UNESCO's World Heritage List since 1979. High historic value which is appreciated in the present allows local population to profit from the rise of tourism industry. According to the Montenegro Tourism Strategy, culture tourism will provide all the benefits if it is combined with sports such as hiking, mountaineering, biking, etc.
Health tourism	"Dr Simo Milosevic" JSC Igalo is one of the largest and the most famous institutions for multidisciplinary spa treatment on the Balkan. It is situated in Igalo, in the municipality of Herceg Novi. It is a pioneer of the modern physical and preventive medicine, rehabilitation, wave therapy and wellness, and became one of the leading international centres for rehabilitation of children, adults and seniors. Institute Igalo also offers programs devoted to the promotion of the healthy way of living, correction of the bad living habits, or simply enjoying the benefits of aromatherapies, massages and face, body and soul pampering treatments. Wellness–fitness or Spa- Wellness-fitness is an all-year product. A Montenegrin wellness strategy is anything but a novelty by European standards. There is an urgent need to catch up with the products offered by competitor destinations. According to the Montenegro Tourism Strategy - no wellness, no all-year tourism. Curative mud in Igalo: It has a similar consistency to that found at other places on the eastern Adriatic, but has not yet been used in wellness programs till now. There are two ways to go: Montenegro can use the mud to develop a wellness product of its own - based on scientific research - which it can then patent against replication, or it can cooperate with curative mud locations on the Croatian coast and promote a joint Adriatic wellness product.
Nautical tourism	Montenegro is rapidly becoming a popular destination for all the nautical enthusiasts. Several investments appeared in Boka Kotorska making it the centre of Montenegro nautical tourism. Currently 6 out of 8 marinas in Montenegro are located in Boka Kotorska with all basic services and several mooring places without services: Kotor, Tivat, Herceg Novi, Kordić – Prčanj, Luštica- Mjeljine and Morning Place-Risan. When it comes to the nautical investments in Boka Kotorska, so far the most important is Porto Montenegro(http://www.portomontenegro.com), which has been proclaimed as a as one of the prestigious yachting destination in Mediterranean. So far, three more projects are in the process of construction of Boka Kotorska which will contribute to the establishing Boka Kotorska as a centre for regional nautical tourism.
Cruise ships tourism	According to the Montenegro Tourism Strategy, cruise potential in Europe is estimated at 2-3% of the total population. Most of these are older, better-off people, over 40-50 years of age. It is important to mention economic relevance for the destinations are port fees, the costs for the excursion organization, expenditure for minor consumption and souvenirs, the tax on these and all other associated services. Having cruise ship in some town is a good promotional tool but on the other hand very sporadic but hefty rush of sizable numbers of passengers at the major sights can bring negative effects. Two ports in Montenegro hold an appeal for cruisers: Kotor because of its UNESCO, status, the landscape and its cultural value and Bar as a point of departure for day trips to Skadar Lake and to Cetinje. For each destination, Montenegro in particular, the country with limited carrying capacity, it is much more important to attract sailing yachts than cruisers, both for greater revenues and the reduced pressure on the infrastructure and the environment.
MICE (Meetings, Incentives, Conferences, Events)	MICE providers are usually hotels in the upper segment that have the premises and technical infrastructure at their disposal to hold such events. These are the prerequisites in the MICE market but they are not enough to guarantee success. MICE is perceived as a growing market. Most MICE events are held in the home country, however, for reasons of time and cost, as mentioned above. Foreign countries are chosen if this affords a substantial advantage. These can be tangible or intangible benefits connected with the location, including its scenic beauty, its name and prestige. Budva, Bečići, Tivat, Kotor, Podgorica as the capital, are suitable for the development of congress tourism, then Cetinje, if the historical core is made up attractively.
Agro tourism	Agro tourism is seen as a development vehicle for rural areas. The term includes the combination of board, lodging and agriculture in farming enterprises. This type of tourism is not much developed in Boka Kotorska region but the recent intentions of Ministry of agriculture and rural development is to connect agricultures households with the tourism so agro tourism could be introduced as part of national tourism offer.

Source: Compiled by authors.

2.6. Pressures and impacts on the coastal and marine ecosystem

Concentration of economic activities in Boka Kotorska is very high, and pollution problems (due to communal wastewater, maritime activities and industry) are exacerbated by the enclosed nature of the bay and the slow exchange of water with the open sea. In 2013, RAC/SPA published a Rapid Assessment Survey of coastal habitats to help prioritize the suitable new areas needing a status of protection for the development of a network of Marine and Coastal Protected Areas in Montenegro⁽²²⁾. The contents of this report offer plenty of information on the pressures and impacts in the coastal and marine ecosystem, as is described in this section.

2.6.1. Pressures from urbanisation and tourism development

Pressures from urbanisation and tourism development are substantial, especially in the areas previously used for military purposes and are now open for different land uses. Luštica peninsula, for example, is seen as one of the most attractive yet underdeveloped areas along the coast. In addition, a number of major infrastructure projects are planned or being considered, which may have an impact on the area. These first include a bridge over Boka Kotorska (Verige Bridge) and the Adriatic speedway. Areas for intensive agriculture and an industrial zone are also being planned. There is also a pressure to increase volume of maritime transport within the Bay and port capacities.

Fishing, and to a much greater extent, tourism, are the two main human activities along the coast. No other sizeable industries are present. Pollution from untreated sewage may be a problem in the near future following the development of tourist infrastructure and the general increase in human pressure along the coast. The dumping of solid waste or soil from the road and other constructions will be a serious problem if the negative effects on marine life are underestimated, especially in the Bay of Kotor.

Threats are due to the rapid expansion of tourism and the plans for tourism infrastructure. No sewage treatment seems to take place at present but some are planned. New infrastructure (hotels, marinas, roads etc.) are likely to increase dramatically. Beach-based and nautical tourism seem to be the target activities at present and all development appears to be in that direction. The threat from diving is not important at this stage as diver numbers are low. Nearly most, if not all, of the beaches and creeks are occupied by tourist activities, while cliffs and rocky coasts are mostly still intact.

The increased popularity of cruises also adversely affects the marine environment. Carrying up thousands of passengers and crew, enormous floating towns are an important source of marine pollution through the dumping of garbage and untreated sewage at sea for example.

Actually *Posidonia oceanica* and *Cymodocea nodosa* meadows are in regression because of eutrophication and waste water discharge. For many other organisms there is no enough data but rapid assessment is indicating decline of some protected species (for example *Pinna nobilis*, *Lithophaga lithophaga*). Also there is intensive pressure on the habitats on the contact zone sea water/coast and that is additional pressure for marine environment. The site is vulnerable because of the direct output of the waste water on many localities. Unfortunately this problem is lasting for many years and if persist it can cause declines in biological diversity and regression of some biocenosis. Also two ports (in Kotor and in Risan) and fuel cisterns (Lipci) are potentially risks for additional pollution. Another kind of vulnerability is habitat destruction because of different constructions on the coast. Also regarding that the road is creating a «ring» around the bay in that way the normal input of sediments and water is somehow changed, but for now there is no data about details and possible changes.

So far, there were no reliable and solid bases for development of protected or planned protected areas, which could provide clear guidelines for particular areas. This also includes provisions for the development, social and ecological capacity and carrying capacity.

Strategic action plans of municipalities Tivat, Kotor and Herceg Novi define ecological issues among which poor wastewater disposal are mentioned as the most critical one, especially in the time of summer tourism season. According to the action plans of municipality Tivat lack of sewage network and cleaning system forced many private house owners to construct private sewage system which will in the period of rain, drop waste water disposal in the sea without any previous cleaning. Having (un)solved issue of waste water will have a direct influence on the cleaning of Adriatic sea and only on the entire living environment in general.

Another common issue mentioned in the plans of municipalities Tivat and Herceg Novi is the construction of artificial beaches. Large amounts of sand and pebbles are for this purpose transported without any research on how it may physically- chemically influence on the compound of sea bottom.

When it comes to the environmental aspect of constructed marinas for the purpose of nautical tourism, we must take into consideration the industrial discharge and runoff from farms and coastal cities has increased.

⁽²²⁾ RAC/SPA - UNEP/MAP, 2015. Rapid Assessment Survey of coastal habitats to help prioritize the suitable new areas needing a status of protection for the development of a network of Marine and Coastal Protected Areas in Montenegro. By Badalamenti F., Garcia Charton J.A., Treviño-Otón J., Mačić V., and Cebrían D., 2013. Ed. RAC/SPA - MedMPAnet Project, Tunis. 56 pp. + annexes.

2.6.2. Pollution problems and other impacts on the coastal and marine ecosystems

Pollution is the introduction of harmful contaminants that are outside the norm for a given ecosystem. Common man-made pollutants that reach the sea include pesticides, herbicides, chemical fertilizers, detergents, oil, sewage, plastics, and other solids. Many of these pollutants collect at the sea depths, where they are consumed by small marine organisms and introduced into the global food chain. Scientists are even discovering that pharmaceuticals ingested by humans but not fully processed by our bodies are eventually ending up in the fish we eat.

Many ocean pollutants are released into the environment far upstream from coastlines. A nitrogen-rich fertilizer which is used by the farmers in the coastal area of Montenegro, for example, end up in local streams, rivers, and groundwater and are eventually deposited in bay such as Boka Kotorska. These excess nutrients can spawn massive blooms of algae that rob the water of oxygen, leaving areas where little or no marine life can exist. Also solid waste like bags, foam, and other items dumped into the oceans from land or by ships at sea are frequently consumed, with often fatal effects, by marine mammals, fish, and birds that mistake it for food. Discarded fishing nets drift for years, ensnaring fish and mammals.

Sometimes pollution is not always physical. In large bodies of water, sound waves can carry undiminished for miles. The increased presence of loud or persistent sounds from ships, sonar devices, oil rigs, and even from natural sources like earthquakes can disrupt the migration, communication, hunting, and reproduction patterns of many marine animals who are inhabitation Boka Kotorska bay area.

Main polluters are private companies, households and hotels. Second largest source polluter is the transportation which is most dynamic in the tourist season.

Other consequences of touristic development that may affect the coastal marine ecosystem are:

- Recreational touristic activities also have a strong impact on the environment. For example, careless boating, diving, snorkelling, and fishing have substantially damaged coral reefs around the world, through people touching reefs, stirring up sediment, dropping anchors, etc.
- Marine animals such as seals, dolphins, whales, and birds are also disturbed by increased traffic of boats, and by people approaching their environment too closely.
- Tourism can also add to the consumption of seafood,

often contributing to overfishing in a specific area.

- Collection of corals, shells, and other marine souvenirs by tourists, or by local people who take them in order to sell it to tourists has a negative effect on the local environment.

2.7. General Vulnerability and Tourist carrying capacity in Boka Kotorska

The human impact which could affect the environment, threatening the sustainable development of Montenegro have been assessed, in line with the Protocol ICZM through two interrelated studies undertaken within the activities of CAMP Montenegro: “Assessment of general vulnerability” and “Tourist carrying capacity” in Boka Kotorska, developed during 2012 and 2013.

Both studies specifically look at the features of two parts of Montenegro: the Boka Kotorska area with the municipalities of Herceg Novi, Kotor and Tivat and the “Riviera of Montenegro” area (municipalities of Budva, Bar and Ulcinj).

2.7.1. Assessment of general vulnerability

The basic purpose of the vulnerability assessment is to determine areas less suitable or unsuitable for certain activity or intervention. The study also suggest integral proposals of development such as, for example: zones where urban growth and other human activities are limited or prohibited; define solutions to limit/control new transport infrastructure along the coast; exclude planning of unacceptable/disallowed facilities in the sea where protected areas are located; etc.

Spatial vulnerability is defined as a condition of the environment, space, soil or phenomena that can give rise to negative effects in case certain intervention is implemented. Vulnerability depends on natural characteristics, existing and potential land uses, and in some segments (such as sea, environment and human health); it also depends on the evaluation of the extent to which a specific area is endangered-polluted.

The Vulnerability analysis also includes the Cumulative Vulnerability assessment, presented in the Map 5, which models represent a synthesis of the analysis of general vulnerability

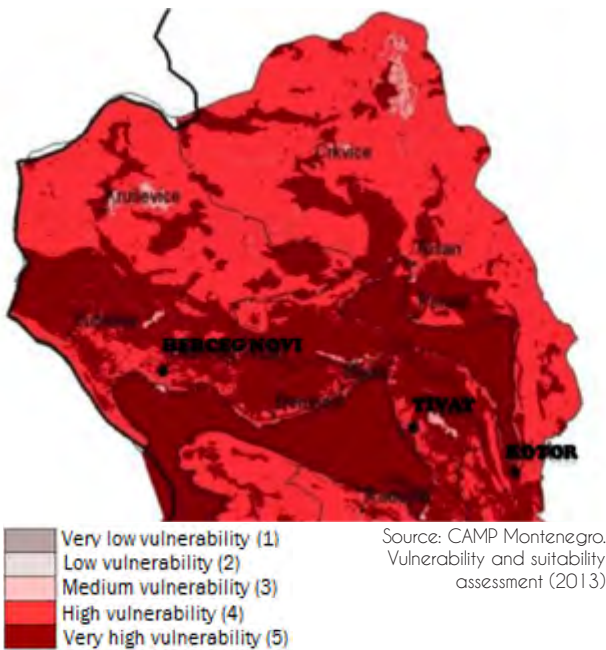
Results of the coastal zone’s assessment by the principle of maximum value⁽²³⁾ point out to exceptionally high vulnerability of the entire coastal area whereas at least one environmental segment is assessed as having very high vulnerability or high vulnerability. Therefore, it is clear that urgent remediation measures need to be undertaken in several areas (urbanization, agricultural, sewage system, etc.).

⁽²³⁾ According to the principle of maximum value, final value of cumulative vulnerability of each spatial unit (individual cell) is equal to the highest vulnerability obtained in individual models for the same spatial unit.

Table 26. General vulnerability assessment, by main issues

Issue	Description
Environment	The environment in the coastal zone of Montenegro is exceptionally vulnerable. Pressures are particularly pronounced at tourist settlements and beaches, as well as in areas entirely used for housing in Kotor. The same situation of vulnerability is revealed for the sea quality in the Bay of Boka as well as for the narrow coastal sea strip.
Sea vulnerability	The most vulnerable area of Boka Kotorska is its narrowest part, in the section between Bijela Shipyard and Porto Montenegro harbour, as well as in Igalo bay. The entire narrow coastal belt of the open sea and the Bay of Boka is highly vulnerable in case of accidental pollution (such as oil spills due to maritime accidents).
Flora and fauna vulnerability (biodiversity)	There is exceptional vulnerability of species and habitats in the entire coastal zone. Analysis of marine biodiversity emphasizes vulnerability of submarine caves in the coastal sea and of <i>Posidonia oceanica</i> habitats.
Erosion	Almost the entire coast is threatened with water erosion that manifests in surface, mixed and deep erosion, as well as landslides and flooding deposits. Soil vulnerability is also significant.
Terrestrial groundwater	Zones of carbonate rocks of cavernous-cracked porosity and good karstification have been identified as the areas with highest vulnerability.
Seismic hazard	Areas of significant seismic impact have been identified in the vicinity of Radanovići, Kotor, Risan and Herceg Novi settlements.
Landscape vulnerability	The entire territory of Montenegro is highly vulnerable, especially in relation to preserved landscapes of the hinterland as well as to major part of the coast.
Climate change	Vulnerability under the existing climate conditions, related to total impacts of droughts, forest fires, strong rains and storm winds of the coastal region is in the domain of medium to very high level. Strong rains would have the highest impact in the Bay of Boka hinterland.
Noise pollution	Represents a significant burden especially in populated areas, on beaches that should serve for rest and recreation, and around the main roads passing through settlements. Higher concentration of large and diverse noise burden is recorded in town settlements of Tivat and Kotor.
Air quality	Evaluation based on the criteria of impacts on human health and application of AQI (Air Quality Index) shown that air quality was satisfactory in all the coastal towns where monitoring stations were located in 2009, except for Igalo station where measurements shown good air quality, meaning that air quality met prescribed standards for all the parameters.
Water pollution	There are negative trends in the whole coast of Montenegro. The main problem is the communal wastewater discharged directly into the sea. This habit is relevant especially in the Bay of Kotor, where wastewater analysis shows that its quality is outside the acceptable sanitary-technical conditions for bathing. Pollution of the open sea is lower due to relatively big depth and good mixing of waters. Discharges need to be resolved urgently and wastewater has to be treated before being discharged. Water quality in Boka Kotorska is intermediate – poor, especially at Marine Biology Institute (IBM) location in Kotor Bay. The reason is the high content of nutrients and chlorophyll.
Hot Spot Location	Sediments and bio-indicators analysis underline that there are no regulations on sediments quality in Montenegro. Special importance plays the phenomena of bio-accumulation in shells at shell fish farming sites: for example in the former Overhaul Institute “Arsenal” in Tivat Bay, and in Kotor Bay where pollution impacts and sea hazard have been assessed as inadmissible/unacceptable. Urgent remediation measures have to be undertaken to regulate sewage systems in Kotor and Tivat Bays which are the main causes of pollution in the area.

Source: CAMP Montenegro. Vulnerability and suitability assessment (2013)



Map 5. Cumulative vulnerability of space by the principle of maximum value

Analysis on land utilization shows that the share of highly vulnerable areas within non-built construction space is very high. **Considering that 80 % of all non-built surfaces of construction areas coincides with locations of high and very high vulnerability**, it is important to note that especially in Herceg Novi, but also in other municipalities, that a large share of vulnerable surfaces comes out of the scope of presented planned land uses (settlements/ housing); these surfaces overlap with biodiversity conservation zones and with quality agricultural surfaces/areas some of which is characterized by very high seismic vulnerability (Kotor, Risan, Herceg Novi).

2.7.2. Assessment of the tourist carrying capacity in Boka Kotorska

The carrying capacity assessment evaluates the maximum capacity of the coastal zone of Montenegro for the future tourism development. The assessment identified the following issues:

High pressure on beach areas due to congestion of the coastal zone characterized by high constructed areas, economic activities and very strong orientation on bathing tourism, which determine higher vulnerability of sea and land.

Poor condition and insufficiency of communal infrastructure system, especially the specific issue of sewage as a threat for the environment (underlined also in the vulnerability assessment). It is a problem, which

could be solved in the near future especially considering actual investments in water and sewage infrastructure for the completion of the water supply network, and the construction of central treatment plants (projected respecting the standard of the European Union).

Ecological vulnerability of the territory related to excessive construction in the narrow coastal zones which revealed also a problem of harmonization of new construction with the original landscape and local architecture.

Transport infrastructure and connections, especially the congestions on the main coastal road, which is still inadequate for the existing tourist flows; lack of motorways, which are not even planned for the next future; expensive, and infrequent/scarce flight connections with the main tourism markets. The actual situation of infrastructures requires, thus, serious investments.

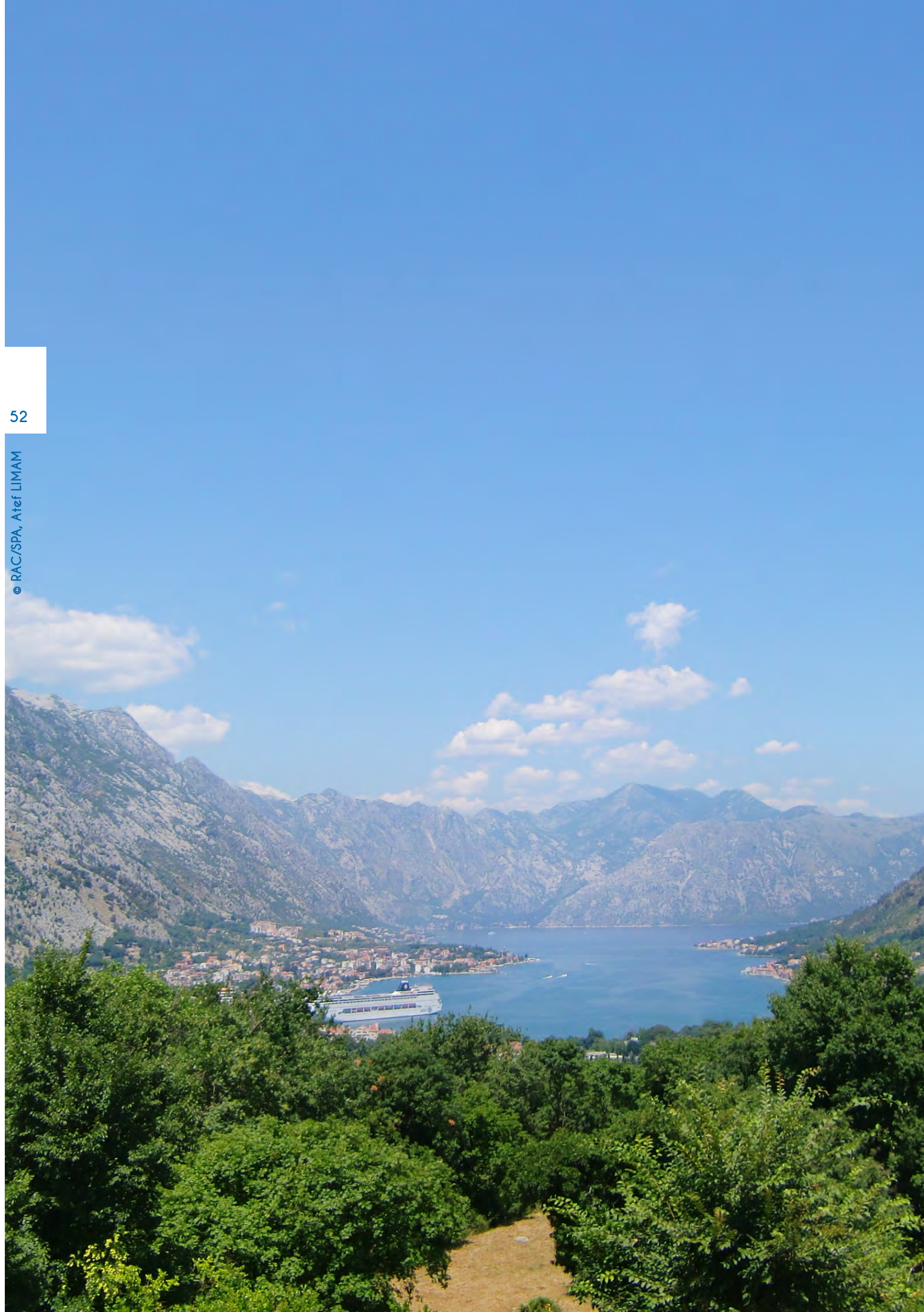
On the other hand, **socio demographic and socio cultural issues** do not represent a limiting factor for carrying capacity assessment because the coastal Montenegro is urbanized, multinational and internally well-connected region where it is recorded a constant population and economic growth, opposite trend compared with the continental part of the country. There is, also, a high share of tourists and people which reside in secondary homes that come from the area of the former Yugoslavia, which has usually similar behaviour patterns to Montenegro.

Analysis on demographic trends by smaller units highlighted that some areas is characterized by high concentration of population, secondary homes and tourist accommodation capacities (immediate surroundings of Herceg Novi) and some areas show extremely high population growth between years 2003 and 2011, (i.e. Kotor Municipality). In comparison with the coastal area, the continental part of the country is losing population.

At this regard doubts with further tourism development are connected principally to dissatisfaction with excessive redistribution of the population from the continental area to the coast and the fear that uncontrolled overbuilding in the coastline will lead to decrease tourism attractiveness in the long time.

The Assessment concluded that tourism development in Boka Kotorska should be aimed to a sustainable scenario, achieved by encouraging building primarily tourist accommodation establishments in the areas which are not sensitive from the natural point, by relocating unnecessary facilities away from the coast and by upgrading the existing ones. At the same time this scenario implied protection of sensitive natural areas and redirection of secondary homes zones deeper in the hinterland.





3. ASSESSMENT OF ECOTOURISM POTENTIAL IN BOKA KOTORSKA

By adopting the Declaration of Ecological state of Montenegro on 20th September in 1991, the country became the first ecological state in the world. The document was introduced at the UN Conference on Environment and Development in Rio de Janeiro. Montenegro's nature, including its rich biodiversity as well as its landscape and cultural values, is the country's greatest treasures. The long-term sustainable and prosperous development of Montenegro is achievable solely through the effective valorisation, balanced use and protection of its natural heritage.

Natural heritage is the basis for ecotourism, and Montenegro's nature and landscapes are the best country's treasures. Therefore, Montenegro is a rich area suitable for

ecotourism. From mountain areas with the possibility of trekking, Skadar Lake which offers the possibility of bird watching, to the visits to national parks. These regions are included in the so-called ecotourism map of Montenegro promoted by a travel agency. The map identified four areas, corresponding to National Parks (Biogradska Gora, Lake Skadar, Durmitor, Lovćen), among which only Lovćen is in Boka Kotorska.

Montenegro is a suitable area for ecotourism. However, can be Boka Kotorska an important spot and gateway for ecotourism ? This chapter tries to answer this question assessing the ecotourism potential in Boka Kotorska considering their ecotouristic attractions and the infrastructures and services related to this type of tourism.



Source: Adria Travel (www.adriatravel.me/img/ekoturistica%20mapa.jpg)

Map 6. Ecotourism map of Montenegro (2010)

3.1. Main ecotouristic sites and attractions in Boka Kotorska

The region of Boka Kotorska is enormously wealthy in nature with special characteristics creating quite unusual contrasts in the relief, vegetation and stone structures. Special climate blend creates a distinguished Sub-Mediterranean climate quite different from other parts of the Montenegrin coast.

The bay of Kotor was geologically a river valley, sunk and submerged by tectonic activity. Its morphological features - especially the distinctive, vertical jaggedness - make it a unique bay in the Mediterranean. The maximum depth of the bay is 52 m. In its hinterland, the region is a typical karst area with distinctive morphology and hydrology.

These morphological, geological and hydrological phenomena have contributed to turn this area into an exceptional creation of nature, unique not only in the Mediterranean but also, when adding an anthropogenic component, in the world.⁽²⁴⁾

3.1.1. Protected areas

The national network of protected areas currently covers 124.964 ha or 9 % of the territory of Montenegro. The country's five national parks Durmitor, Skadar Lake, Lovćen, Biogradska gora and Prokletije cover most of this area and are the main ecotourist sites. The rest falls under 40 different classifications of protected areas, such as natural monument, special forms of landscape, regional park, etc⁽²⁵⁾. When, notwithstanding the existence and form of management, the nationally (124.964,24 ha) and internationally (143.594 ha) protected natural assets (protected areas of nature) are assembled, excluding doubling/overlapping, the total protected area amounts to 268.558.24 ha which accounts for 19.44 % of the state territory⁽²⁶⁾.

In 2012 an increase in the number of visitors and revenues was recorded in comparison to the previous year. On the level of public enterprise, revenues from entry tickets in 2012 increased from 406.000 € to 556.000 €, which makes 37 % increase. During 2012 there were 201.111 tourists who visited Durmitor, Biogradska Gora, Lovćen and Skadar Lake, a 23 % increase respect 2011. Lovćen National Park recorded 27.249 visitors, which represents a 19 % increase in comparison to 2011.

In Boka Kotorska, the main protected areas are Lovćen National Park and the Tivat salina (Solila). However, at international level, Kotor is known as a place included on UNESCO's World Heritage List.

Natural and Culturo-Historical Region of Kotor · UNESCO World Heritage (Map 7). Due to its exceptional cultural and natural features, a part of the Bay, the area of Kotor -consisting of the two smaller bays of Kotor and Risan- has been included on UNESCO's World Heritage List. Following the 1979 earthquake, which badly hit the south of Montenegro, Boka Kotorska got its place on the UNESCO List of the World Heritage in Danger.

The limits of the World Heritage site coincide approximately with the crests of the natural sinkhole formation. At both ends, the site is bordered by Lovćen National Park and the massif of Orjen, making a vast natural area. The Gulf of Tivat is omitted because the authenticity of its settlements has been downgraded by recent industrialization (shipyards, harbour equipment)⁽²⁷⁾.

The cultural-historical region of Kotor is considered to be of outstanding universal value by the quality of its architecture, the successful integration of its cities to the gulf of Kotor and by its unique testimony of the important role that it played in the radiance of the Mediterranean culture on the Balkan territory⁽²⁸⁾.

Lovćen National Park. Located in the rocky region of Dinara Alps, this national park encompasses the central and the highest part of Lovćen mountain massif and covers an area of 6.400 hectares. It was proclaimed a national park in 1952. Besides Lovćen's natural beauties, the national park was established to protect rich historical, cultural and architectural heritage of the area. Mt Lovćen (1,749 m) is the black mountain that gave Crna Gora (Montenegro) its name. Therefore, this location occupies a special place in the hearts of all Montenegrins.

The Park is bordered on South with the highway Budva - Cetinje and on North with old Kotor road. Woods cover two-thirds of the national park surface, particularly the black beech that gives it its moody complexion. Even the rockier tracts sprout wild herbs such as St John's wort, mint and sage. The park is home to various types of reptile, 85 species of butterfly and large mammals such as brown bears and wolves. The 200 avian species found here include regal birds of prey such as the peregrine falcon, golden eagle and imperial eagle. Several species migrate between here and Lake Skadar⁽²⁹⁾. There are around 2,000 plants in the park. Many endemics, rare, medicinal, aromatic and honey are also characteristics. This abundance of life is result of extreme altitudes and under influence of two climate zones: Mediterranean and Continental.

The mountain has two imposing peaks, Štirovnik (1,749 m) and Jezerski Vrh (1,657 m). Although Štirovnik is the highest summit of Lovćen, it has never gained the glory as Jezerski Vrh had.

⁽²⁴⁾ <http://www.expoaus.org/the-kotor-region-uso10>

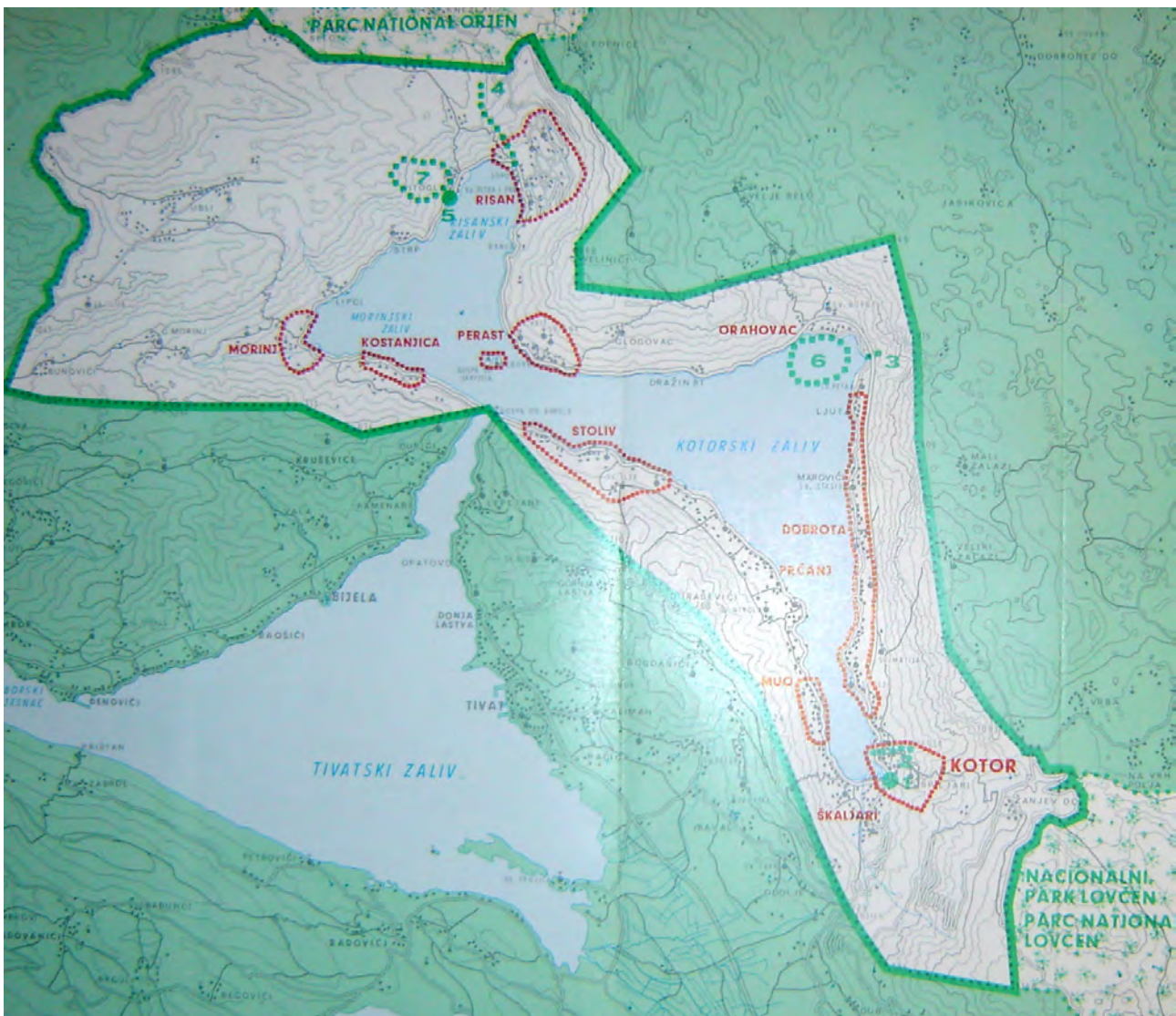
⁽²⁵⁾ Source: <http://www.europarc.org/uploaded/documents/848.pdf>

⁽²⁶⁾ Source: National Biodiversity Strategy with the Action Plan for the period 2010 - 2015

⁽²⁷⁾ Source: http://whc.unesco.org/pg.cfm?cid=31&id_site=125

⁽²⁸⁾ <http://www.sitiunescoadriatico.org/index.php?pg=1073>

⁽²⁹⁾ Source: <http://www.lonelyplanet.com/montenegro/lovcen-national-park>.



Source: http://whc.unesco.org/en/list/125/multiple=1&unique_number=137

Map 7. Natural and Culturo-Historical Region of Kotor - Map of the inscribed property

On the summit of Štirovnik is placed a telecommunication tower and the access to the summit is not allowed. Jezerski Peak is the second highest point of the National Park; there is a mausoleum of the famous Montenegrin poet and ruler Petar II Petrović Njegoš. Its foundations were built into six-meter-deep mountain rock. The Mausoleum can be reached by road or by hiking paths⁽³⁰⁾. At the end of the road, there are 461 steps leading to the monument. From Jezerski Vrh many beautiful panoramas can be sighted - to the huge massif of Orjen mountain, part of Boka Kotorska bay, Prokletije mountain range to the east, Durmitor, Skadar lake and the town of Cetinje.

Lovćen is the most visited park in Montenegro, partly because there are housings on its territory. In 2012

this national park recorded 27.249 visitors, a 19 % increase in comparison to 2011. Entering into Lovćen National Park costs 3 € and Njegoš Mausoleum has an entry fee of 2 €.

Here, the most popular activities practiced are trekking, walking and skiing (even if the ski region was out of use for five years). The mountains are criss-crossed with hiking paths and mountain-biking trails, which can be accessed from Kotor, Budva or Cetinje, and the Coastal Mountain Transversal⁽³¹⁾ runs straight through. The park's main hub is Ivanova Korita (1,261 m), situated on the eastern slope of Jezerski Vrh, where there are a few eateries and accommodation providers and, in winter, a beginners' ski slope. Here you'll also find the National Park Visitor Centre.

⁽³⁰⁾ <http://www.summitpost.org/lov-en-national-park/601473>

⁽³¹⁾ See section 3.2.1 about walking routes

Solila salt marsh (Tivat). This salina was designated in 2007 as Special Flora and Fauna Reserve, the first of this kind in Montenegrin coast since 1968, when a large number of beaches was protected. The site was awarded the status of IBA - internationally, Important Bird Area- in Montenegro and it also enjoys the Emerald status under Bern Convention. In 2013 the Montenegrin government officially declared this ecological jewel a Ramsar Nature Reserve. Together with the delta of the Bojona/Buna River along the Albanian border and the marshlands of Buljarica Bay, the Tivat salina constitutes, in terms of its surface area, the most important wetlands along the coastline of Montenegro⁽³²⁾.

The salt pans of Solila are situated at the south of the city of Tivat, approximately 16 km inland from the entrance to the Bay of Kotor. The salt pans have been used for salt production since the 14th / 15th century. During the early 1960s, the salt pans were renewed and adapted for industrial salt production.

This saline is habitat to species as rare as the Albanian water frog or the purple flowering limonium, otherwise known as sea lavender. These salt marshes offer an important resting place for migrating birds such as the Osprey, the Eurasian Curlew and the Black-tailed Godwit. 47 species of water birds and waders of 111 bird species have been recorded in this saline⁽³³⁾.

In 2006, Solila was an abandoned land full of waste. Then the Coastal Zone Management Authority of Montenegro organized cleaning of this area and removed waste. In addition to this, channels were cleaned and bridges repaired. In 2013, Coastal Zone Management Authority of Montenegro performed reconstruction of Solila in infrastructure such as gates, information boards and bridges. Today, Centre for protection and research of birds of Montenegro (CZIP) are developing in Solila the ORNIBA program with different actions. One of them has been the repair of handrails and benches trenches installed for the purpose of bird watching along the edge of this area.

Currently, this area is open to the public. There are no collection points or person in charge of protection of this area. According to the Law on the Coastal Zone Management Authority in 2014, Solila falls under their competence. However, *Engaging with the Nature on the Area of Tivat's Solila*, another project where CZIP is involved, would employ one person to sell souvenirs, and perform both sale and protection function.

3.1.2. Coastal and marine landscapes

Coastal and marine areas are the best-known touristic sites in Boka Kotorska.

The Bay of Kotor and their islands. This area has some of the most amazing natural landscape in Europe, with its natural fiord-like structure, its beautiful beaches, resorts and historical sites. The Bay of Kotor is the most indented part of the south-eastern part of the Dinaric coast. A unique feature for Boka is the early spring when all surrounding mountains are still covered with snow while the coast flourishes with Mediterranean trees and flowers in blossom. During the winter, one can enjoy the pleasant sun and calm weather on the coast at just 1 hour of slow drive from the mountains. Summer season in Boka is pleasant with a little bit more rain especially in the internal area, than in other parts of the Montenegrin coast, which is on the other hand reflected in dense vegetation. Boka is bejewelled by seven beautiful islands: Mamula, Sv. Marko, Gospa od Skrpjela, Sv. Djordje, Milosrdja, Ostrvo Cvijeca and Mala Gospa.

Beautiful beaches. The most beautiful beaches in Boka Kotorska are Dobrec, Žanjice, Rose and Mirište (Herceg Novi), Trsteno, Risan beach, Morinj (Kotor), Islands of Flowers, The Blue Horizon (Tivat). The following table describes the most beautiful beaches in the Bay (Table 27).

Luštica Peninsula. Reaching out to form the southern headland of the Bay of Kotor, the gorgeous Luštica Peninsula hides secluded beaches and a dusting of idyllic villages scattered amongst the olive groves of its remote southern edge⁽³⁴⁾. The peninsula has an area of 47 km² and is 13 km long. The highest point of the peninsula is Obosnik peak, at 582 m. It has 35 km of coast, which accounts for 12 % of Montenegrin coastline. Luštica is divided between the Herceg Novi and Tivat municipalities.

Within a few minutes' walk, or drive, surrounding the seashore is easily accessible and invites visitors to its numerous beaches, or strolls along its invigorating and dramatic coastline. Tourists can see from olive groves with trees that are more than 1000 years old, a trove of ancient stone houses and untouched village communities still surrounded by original stone walls, pristine beaches, islands, abandoned castles, and hear local legends of famous sea captains and pirates. The stunning views and scenery, clean seas, warm summers and relative isolation make Luštica an attractive tourist destination.

⁽³²⁾ Sackl, P.; Schneider-Jacoby, M.; Stumberger, B. (2006). "The importance of Tivat salina (Montenegro) for migrating and wintering water birds, including some notes on passerines". In: *Annales · Ser. Hist. Nat.* · 16 · 2006 · 2

⁽³³⁾ Sackl, P.; Schneider-Jacoby, M.; Stumberger, B. (2006). "The importance of Tivat salina (Montenegro) for migrating and wintering water birds, including some notes on passerines". In: *Annales · Ser. Hist. Nat.* · 16 · 2006 · 2

⁽³⁴⁾ Source: <http://www.lonelyplanet.com/montenegro/Luštica-peninsula>

Table 27. Best beaches in Boka Kotorska

Beach	Description	Municipality
Trsteno	Trsteno Valley is one of the most beautiful beaches in the region of Donji Grbalj and is one of the nine most beautiful beaches of the Montenegrin coast. It is situated deeply in land and so is protected from high waves, storms and south wind. The beach which is 200m long, with fine sand, clear azure sea water, sandy sea bottom, untouched natural environment presents only a part of what you expect on Trsteno. You can get there by asphalt road that connects Trsteno to the motor way Herceg Novi - Bar.	Kotor
Risan Beach	The Risan Beach is situated on the part of the coast between Risan and Strp. It is a pebbly beach, 1000 m long, 10 m wide, and very convenient for medicinal tourism and recreation.	Kotor / Risan
Morinj beach	This is a sandy-pebbly beach, 1000 m long, 15 m wide, the background of which has a natural attraction canal with a marine inland.	Kotor
Islands of Flowers	The surface of the beach is 1200 m, and it spreads out in the shape of a circle along the whole length of the isle which is 300 m long and 200 m wide. There are many small sandy beaches. The isle is 2 km away from the town. Its very name speaks for itself. It is abundant in vegetation which provides a lot of shade.	Tivat
The Blue Horizon (Plavi horizonti)	This beach is located in Przna cove on the Luštica semi-island. It's a natural sandy beach with a resort. Beach is accessible by local road (5 km) from Adriatic Highway (Jadranska magistrala). From the close village Radovici there's local electric train	Tivat
Žanjice	Žanjice is located in the bay Mirište and is deeply indented in the mainland of the peninsula Luštica. It is about four nautical miles away from Herceg Novi and is placed in the ambient of the azure blue sea and ancient olive trees. The beach, 300m long and 15 meters wide, is composed of white pebbles. This beach attracts up to 1000 people in the height of summer. Neighbouring Mirišta is considerably smaller. Nearby there is Plava špilja (the Blue Grotto) and the island of Mamula.	Herceg Novi
Dobrec	This is a natural pebbles beach located in Dobreč cove on Luštica semi-island in the open sea area. Beach is accessible only by boat. The total surface is 600 m ² . Dobreč is reported to have some of the cleanest waters in Montenegro.	Herceg Novi
Miriste	Miriste valley is between Zanjic valley and Mirište cape. It is the most attractive location of the Herceg Novi Riviera. A public beach located in the Mirište Cave, next to Cape Arza is a combination of concrete and sand, covering an area of 2.000 m ² . The beach rises in grades forming steps separating it from the forest which creates a unique harmony with the sea. Part of the bathing beach is a restaurant where you can taste the specialties of this place.	Herceg Novi
Rose	Rose is a fishing settlement with unique architecture, next to the sea and leaning on a hill at the very tip of the Luštica peninsula, facing Igalo. This is one of the most beautiful spots of the Riviera. Its background is a forest with extraordinary specimens of Mediterranean plants. The beach is rocky, and the sea is deep with sandy and rocky bottom which is a true challenge for divers and underwater fishing lovers. This place used to be a quarantine for the seamen from all over the world. Nowadays the descendants of Portuguese and Spanish sailors can be met here. You can reach Rose both from the sea and land.	Herceg Novi

Source: www.montenegro.travel

From the ecotouristic point of view, Luštica is largely undeveloped with populations of wild boar, mongoose, jackal and edible dormice. Nightingales and Scops-owls can also be heard in abundance. This peninsula is covered with maquis and typical Mediterranean vegetation. Another ecotouristic attraction are the natural beaches, especially quiet and isolated (even in the high season) and only accessible by boat, such as Arza and Dobreč beaches.

The Blue Grotto (Plava špilja). This is one of the most attractive in a series of caves located on the peninsula Luštica, situated between the bay Zlatna luka (Golden Harbour) and cape Mokra gora (Wet Mountain). It was named the Blue Grotto because of its unusual blue colour that is the result of the reflection of sunrays on clear sunny days⁽³⁵⁾. The cave can be reached by boat. Boats head into the 9 m-high cave and usually allow visitors an opportunity for an iridescent swim. The Blue Grotto is accessible through two entrances. One entrance is very wide, but low, while the other one is totally opposite - narrow and very tall. The cave is especially attractive for divers. It is an excellent location for photo safari, both above and under the sea.

Drazni vrt and Strp in the Bay of Kotor and Risan. Inside these diving areas, impressive *Cladocora coespitosa* reefs are present and are associated with a rich assemblage of large-sized sponges and cnidarians, notably massive colonies of the false black coral, the gorgonian and the yellow cluster anemone. RAC/SPA proposes in its *Rapid Assessment of coastal habitats*⁽³⁶⁾ these areas as suitable microreserves to protect the Coralligenous assemblages. What is important here is to protect a small part of the coast (roughly 600 m for the core area plus a buffer area of 300 m at the two sides) down to 30 m, in particular to prevent mechanical damage to the structure, dumping of waste or construction debris, entanglement of fishing gears and any source of organic pollution. Scuba diving should be regulated and the collection of organisms strictly prohibited.

3.1.3. Mountain landscapes

The Boka Kotorska is surrounded by steep, limestone mountains of the Dinaric Alps, with the highest points at Mt. Orjen (1895 m) and Mt. Lovćen (1749 m). As a national park, Lovćen has been described in 3.1.1. section.

These surrounding mountains are of predominantly limestone composition, with numerous karst forms such as caves, sinkholes and pits, while the coastal part is composed of flysch and sedimentary rock. The karst character of the

area has also influenced its hydrology. Numerous karst springs appear at sea level (Škurda, Gurdić, Ljuta) and there are also hidden springs above sea level (Sopot, 33 m) and spring holes on the sea bed. One particular part of the hinterland of Kotor (Crkvice, 1097 m) receives the highest amount of rainfall (5155 mm) in Europe. However, because of the karst configuration, much of that water sinks underground, creating subterranean watercourses that emerge at sea level or below, lowering the salinity of the seawater but also raising the aridity of land.

Mount Vrmac. It is an extension of Mount Lovćen. It is located north of town of Tivat, and encloses town of Kotor from the south. This mountain is part of Vrmac Peninsula, over 10 km long, which divides the Bay of Kotor and the Bay of Tivat. From the top of mount Vrmac you can see on one side Kotor, and on the other side Tivat and Tivat archipelago with the islands of St. Marko and Gospa of Milosti. The highest tops on Vrmac are St. Ilija (785 m) and Velji vrh (712 m), and two of the most beautiful settlements are Gornji Stoliv and Gornja Lastva.

Mount Vrmac, with its craggy outcrops and lush vegetation, provides a striking contrast to the Bay. The ridge route provides mountain bike trails and gentle walks with breathtaking views of the Boka. From just outside Kotor town an old zig-zag Austro Hungarian military road dating from 1860 takes up to the top of the Vrmac Peninsula.

Mountains of Orjen. Mt Orjen (1.893 m) separates Herceg Novi from Hercegovina and is the highest mountain of the east Adriatic coast. Orjen's massif rises above Herceg Novi, reaches its highest peak just 14 km from the sea and descends to the north and west, well into Bosnia-Herzegovina and Croatia. Patches of evergreen maple and white oak can be found amongst the rugged limestone karst on the lower slopes, giving way to firs and beeches above the winter snowline.

The massif of Orjen lies to the Northwest of Risan in Boka Kotorska. From the town of Risan, situated at the innermost protected part of the bay, a well-engineered road, at first metalled, with many hairpin bends climbs to about 1600 m, over to the interior. At the main summit of Orjen and the surrounding ridges and high plateaux, the action of quaternary glaciation is evident. In Ice Age long valley glaciers receded from Orjen to the Bay of Kotor and surrounding poljes, hollowing U-shaped valleys and cirques in their course. Glaciers also shaped jagged peaks and ridges. Glacial and karst type relief combine now in a unique coastal scenery. Elsewhere in the Mediterranean, few places show similar phenomena.

⁽³⁵⁾ <http://www.hercegnovi.montenegro.travel/en/mjesta-kategorije/priroda-i-javne-povrsine>

⁽³⁶⁾ RAC/SPA - UNEP/MAP, 2015. Rapid Assessment Survey of coastal habitats to help prioritize the suitable new areas needing a status of protection for the development of a network of Marine and Coastal Protected Areas in Montenegro. By Badalamenti F., Garcia Charton J.A., Treviño-Otón J., Mačić V., and Cebrian D., 2013. Ed. RAC/SPA - MedMPAnet Project, Tunis. 56 pp. + annexes.

A National Park was planned for a long time on Orjen. The disintegration of Yugoslavia, civil war and standstill of tourism cancelled plans. Today plans have rejuvenated but funding may be a problem. One of the big challenges is to create a transboundary protected area as Orjen National Park could be linked to Orjen and Sniježnica regions in Bosnia & Herzegovina and in Croatia.

3.1.4. Wildlife and vegetation

Wildlife is a general term that technically covers both flora and fauna, although in popular -and touristic-use, wildlife is mostly used to refer to animals in the wild. Perhaps a classic image of wildlife for many people is a large mammal or a flock of birds, but the term is widely used to cover all type of animals, including all kind of insects, and marine life⁽³⁷⁾.

In ecotourism, wildlife watching is one of the main activities. This activity has grown dramatically in recent years, and a quick search on the Internet provides many examples of tourism companies that either market specific wildlife watching tours, or promote their products by highlighting wildlife watching.

The section focus on those wildlife and vegetation that can attract ecotourists of general interest. It is not the main aim to provide a full description about all the species living in natural areas of Boka Kotorska. Knowledge about the biodiversity in Montenegro is rather superficial, with many gaps, lack of inventories for many groups, as well as lack of data on population dynamics, ecology, and the degree of genetic variations for the majority of species⁽³⁸⁾.

In Boka Kotorska, plant cover has traditionally had an extraordinary importance in the life and survival of population of the region (firewood, quarters and shipping timber, medicinal herbs, honey plants, flowers, net colouring, resin, Venetian sumac, pinewood splinter etc.). For this reason, it is reflected in the local nomenclature of settlements and localities (Kostanjica, Odoljen, Kosmač, Glogovnik, Glogovac, Devesilje, Zelenika, Orahovac, Gora, Rasovi, Grabovac and others). Since in Boka Kotorska there are specific events, such as camellia and mimosa days (held in Kotor and Herceg Novi), those species –although they are not wild– stand for attractive ones for tourists.

Coastal and marine wildlife and vegetation⁽³⁹⁾.

Along the whole coastline of the bay, the rich distribution of Mediterranean species coexist with continental and exotic vegetation such as laurels, palms, olive-trees, orange and lemon trees, pomegranate trees, agaves, camellias and

mimosas. Along the rocky shore the lower part of the infralittoral is often covered by well-preserved *Posidonia oceanica* meadows.

Since the middle of the 20th century a number of researchers have studied Boka Kotorska fauna and have contributed greatly to improving knowledge on its biodiversity. In this inner part of the bay we have some of the habitats from the resolution No. 4/96 and some species protected by national and international laws. Because of that this site has a great importance for marine biodiversity.

Due to the calcareous composition of the relief, water from the hinterland flows subterranean and mostly comes up again in the form of springs at the coastline or under the sea level. In such a way specific environmental conditions are created and protection of specific habitat and high diversity of marine life is of great importance.

The benthic assemblages surveyed along the coast of Montenegro are diverse and typical of the infralittoral of Mediterranean hard and soft substrates, with the notable exception of those in the Bay of Kotor, which represent a unique spot. As said above, the areas close to Drazni vrt and Strp in the Bay of Kotor and Risan are suitable micro reserves to protect the Coralligenous assemblages. The megafaunal benthic assemblages within the first 20 metres depth are characterized by the presence of massive cnidarian with madrepores and gorgonians and sponge assemblages.

In Kotor, a film festival on marine life is held in the end of May and the beginning of June. This event can also have a tourist interest for marine wildlife lovers.

Mountain wildlife and vegetation. Maybe, Orjen is the most attractive site for watching mountain wildlife due to its extension and isolation. This area is ideal for the survival of important species (also with ecotouristic attraction), such as bears, wolves, partridges and attractive birds of prey such as the short-toed Eagle. However, the brown bear survives in Montenegro in small numbers and encounters between humans and bears are very rare. The grey wolf inhabits some of the more remote areas, but again, sightings are rare. Therefore, the touristic attraction of these two big mammals is weak. Other mammals include wild boar, rabbits, foxes, martens and squirrels, with less attractiveness.

Karst ecosystem in Orjen is particularly interesting. The numerous endemic species of fauna and entomofauna exist there. There is a great diversity and abundance of subterranean fauna in caves, pits and other forms of underground karst.

⁽³⁷⁾ **Wildlife Watching and Tourism: A study on the benefits and risks of a fast growing tourism activity and its impacts on species.** UNEP / CMS Secretariat, Bonn, Germany

⁽³⁸⁾ **Source:** Porej, D. & Stanišić, N., 2009. *Results of the initial evaluation of Protected Area Management in Montenegro using RAPPAM Methodology*

⁽³⁹⁾ **Source:** RAC/SPA - UNEP/MAP, 2015. *Rapid Assessment Survey of coastal habitats to help prioritize the suitable new areas needing a status of protection for the development of a network of Marine and Coastal Protected Areas in Montenegro.* By Badalamenti F., Garcia Charton J.A., Treviño-Otón J., Mačić V., and Cebrian D., 2013. Ed. RAC/SPA - MedMPAnet Project, Tunis. 56 pp. + annexes.

Lovćen National Park is home of brown bears and wolves, but again very difficult to watch. In return, 85 species of butterfly and birds of prey such as the peregrine falcon, golden eagle and imperial eagle can be very attractive. However, one of the main attractions in Lovćen are the beautiful autumn colours of the beech forests, which also appears in the lower and warmer parts of Orjen. If Karst features are especially prominent on Orjen mountains, forest cover is somewhat more extensive in Lovćen.

On the slopes of Mount Velji Vrh (on Mount Vrmac) another ecotourist attraction is the old pebble road that zigzags up to a peaceful hamlet through chestnut woods and olive groves.

Solila (Tivat salina) wildlife and vegetation.

Birds are the main attraction in this natural site. There are 47 bird species registered so far at Solila, four of which are constantly present, 35 that hibernate, while six probably nest there. Together with other bird groups, singers and predators Solila registers 111 bird species so far, and several new species are registered every year. Particularly significant is the importance of at least 11 species listed in Annex 1 of the EU Bird Directive, several globally threatened species such as Pygmy Cormorant, *Phalacrocorax pygmeus*.

14 representatives of amphibians and reptiles are also recorded in Tivat Salina, 10 of which are vulnerable and 3 endangered species listed on IUCN Red List. Species of special interest for protection on Tivat Salina are Scadar frog *Rana shqipërica* and legless lizard (guivre), *Ophisaurus apodus*.

The vegetation growing in saline wet habitats refers to the genus of *Salicornietea* and *Limonietela*, as well as vegetation from the genus of *Juncetalia* maritime and vegetation of brackish wetlands from the genus of *Phragmitetalia*. Since these complex types of vegetation grow on sludge-clay ground, have largely disappeared on majority of habitats, the preservation appears to be a special environmental challenge⁽⁴⁰⁾.

3.1.5. Cultural monuments

In Boka Kotorska region, the cultural monuments are relevant in terms of sustainable tourism, too. There are 357 cultural monuments in Montenegro, divided into three categories considering their culture-historical value. About one third of monuments (120 in total) are located in Boka Kotorska, as shown in Table 28.

The majority of the monuments are located in Kotor. The most famous is St. Triphun Cathedral, the older than many famous church and cathedrals in Europe. It is under UNESCO protection. The St. Luka Church (consisting two altars- catholic and ortodos one) is famous, to. And when it is about maritime history of the Montenegrin coast, the Maritime Museum of Kotor is particularly interesting.

Under the municipality of Kotor are small urban settlements Perast and Risan. Perast is the best preserved baroque area on the Montenegrin coast. Among the cultural monuments, the St. Nicholas Church, which great cultural treasures, St. George Church and Our Lady of the Rocks (Baroque church of artificially -made island). In Risan, there are the remains of an ancient villa with mosaics that are unique copy of our coast .

Herceg Novi has a rich cultural and historical treasures. The most famous ones are: Kanli Tower, Citadel, Forte Mare Fortress, the St. Anthony monastery complex (which is spiritual center of Catholicism in this area), St. Jerome Church and Savina Monastery (consisting of three churches), and other major institutions such as the city archives, art gallerie public libraries.

Cultural and historical heritage of Tivat is particularly characterized by the following: the Buca – Luković complex, the Renaissance ensemble with a significant number of details of late Gothic, the Verona-Bizanti palace, the six Austro -Hungarian towers around

Table 28. Cultural monuments in Boka Kotorska

City/region	I category – Monuments of exceptional importance	II category – Monuments of great importance	III category – Monuments of local importance	Total
Herceg Novi	1	17	29	47
Tivat	0	4	6	10
Kotor	10	30	23	63
Boka Kotorska	11	51	58	120
Montenegro	35	135	187	357

Source: Publication 'Map of resources', Ministry of economy of Montenegro, 2011

⁽⁴⁰⁾ <http://www.birdwatchingmn.org/index.php?lng=cg&page=65>

Arsenal, St. Srđ, St. Simon and St. Agata Church. The peninsula Prevlaka, located close to Tivat consists of remains of the monastery of St. Michael .

3.2. Infrastructures, buildings and services for ecotourism

Plenty of park areas, walking routes, sightseeing places, national restaurants, and local food stores are supporting the idea of ecotourism in Boka Kotorska.

3.2.1. Hiking trails and walking routes

Walking tour excursions around Boka Kotorska are one of the most famous intangible tourism products from the sea side of Montenegro due to its natural beauty and breath-taking sightseeing points.

“Wilderness Hiking & Biking Montenegro”.

(Map 8) Before presenting the main routes in Boka Kotorska, a project deserves special attention. The “Wilderness Hiking & Biking Montenegro” project was initiated in 2007 and included in the national «Tourism Development Strategy to 2020». It adds attractive adventure activities in the mountainous backcountry to the range of tourist offerings. In 2007, Montenegro had more than 3,000 km paved roads for car traffic, but practically no network of hiking and biking trails. This is completely different now: today, Montenegro has about 6,000 km of attractive routes; the “Top Trails” have already been marked and signposted, and the others shall follow gradually. This project was the winner of EcoTrophea 2011. Since 1987 the German

Travel Association (DRV) (<http://www.driv.de/en.html>) has annually awarded its international prize EcoTrophea for exemplary projects which are committed to environmental protection and social responsibility in tourism around the globe.

According to Wilderness Hiking Montenegro, the four main tours in the coastal mountains, easily accessible from the towns of Boka Kotorska, are the following.

- A. Ascent to the Subra (1,679 m) · 5.30 hr · 950 m in height | Top trail
- B. Mountain hike to the fortress Sv. Andrija (736 m) · 4.30 hr · 750 m in height | Top trail
- C. Ascent to the local mountain of Kotor (1,098 m) · 2.15 hr · 240 m in height
- D. Ascent to the Njegoš mausoleum (1,657 m) · 6.45 hr · 800 m in height | Top trail

Wilderness Hiking Montenegro also includes a panoramic tour over the coastal mountains: **Montenegrin Coast Transversal** (“Primorska Planinarska Transferzala”, briefly PPT). Montenegro’s Mountaineering Association and several mountaineering clubs as well as non-governmental organisations have established the «Montenegrin Coast Transversal”, aiming to expand coastal tourism’s reach into the still unexplored natural beauty of Montenegro’s southern hinterlands. The result is a 182 km transversal hiking trail with 150 km of access paths. This hiking trail was the winner of the Wild Beauty Award 2007⁽⁴¹⁾, and is one of nation’s “Top Trails”.



Map 8. Wilderness Hiking Montenegro. Top trails in Boka Kotorska

Source: Wilderness Hiking Montenegro. Map 1:450,000.

⁽⁴¹⁾ This is the annual award for contribution to the quality, recognition and promotion of tourist offer of Montenegro. The Council of Tourism of the Government in 2005 established the assignment of the prestigious national award WBA

The Transversal Route was inaugurated in 2006 and offers excellent opportunities for active tourists and ecotourists. This transversal hiking trail leads from Herceg Novi at Montenegro's northern Adriatic coast, alongside the coastal mountains of Orjen, around the Bay of Kotor, via Lovćen and through Pastrovska Gora as well as the Rumija mountains to Bar in the southern part of the coast. Even a day-trip along this path lets you enjoy breath-taking views. Furthermore, 150 km access trails offer many options for day hikes.



Source: Wilderness Hiking Montenegro. Map 1:450,000.

Wilderness Biking Montenegro has also selected five "top trails around the country and the "Tour de Montenegro" - "the Mega-Trans-Alp" of the Southern Adriatic. With distances from 262 km up to 1,276 km for the "Tour de Montenegro" these routes offer various daily stretches and make allowances for different levels of fitness. Only one of these five top trails goes around Boka Kotorska. It is the top trail 1 "Salty and Sweet", that begins (and ends) at Herceg Novi. After cross Orjen mountains, this 9 days trail goes to the north to visit Durmitor National Park and other sites. The last days the trail goes on Lovćen National Park and the town of Kotor. The total length is 595 km.

Vrmac walking routes. Mount Vrmac offers several walking and biking routes from Tivat, Kotor and other starting points (Map 9).

The main trails in Mount Vrmac are:

- **Mount Vrmac.** The main walking trail follows the line of crest and is suitable for mount biking, and a whole network of old roads and paths is suitable for hiking and mountaineering.
- **Two bays · Along Medjica⁽⁴²⁾** : From Gornja Lastva you can walk "along Medjica," to Bijeli pijesak (the White Sand). This walking route has breath-taking views

offering vistas of the Bay of Tivat and over Luštica of the open sea.

- **Through chestnut trees in Gornji Stoliv, Tivat.** Gornji Stoliv is a small fisherman settlement from the 14th century located between Prčanj and Kotor. This place is famous in the springtime because of the festival "Days of Camellia" where fish and seafood is offered to the crowd in the beautiful exhibit of camellia flowers. Walking tours goes through chestnut woods and olive groves and end in the church of Saint Ilija, situated on the top of a hill (260 m above sea level).

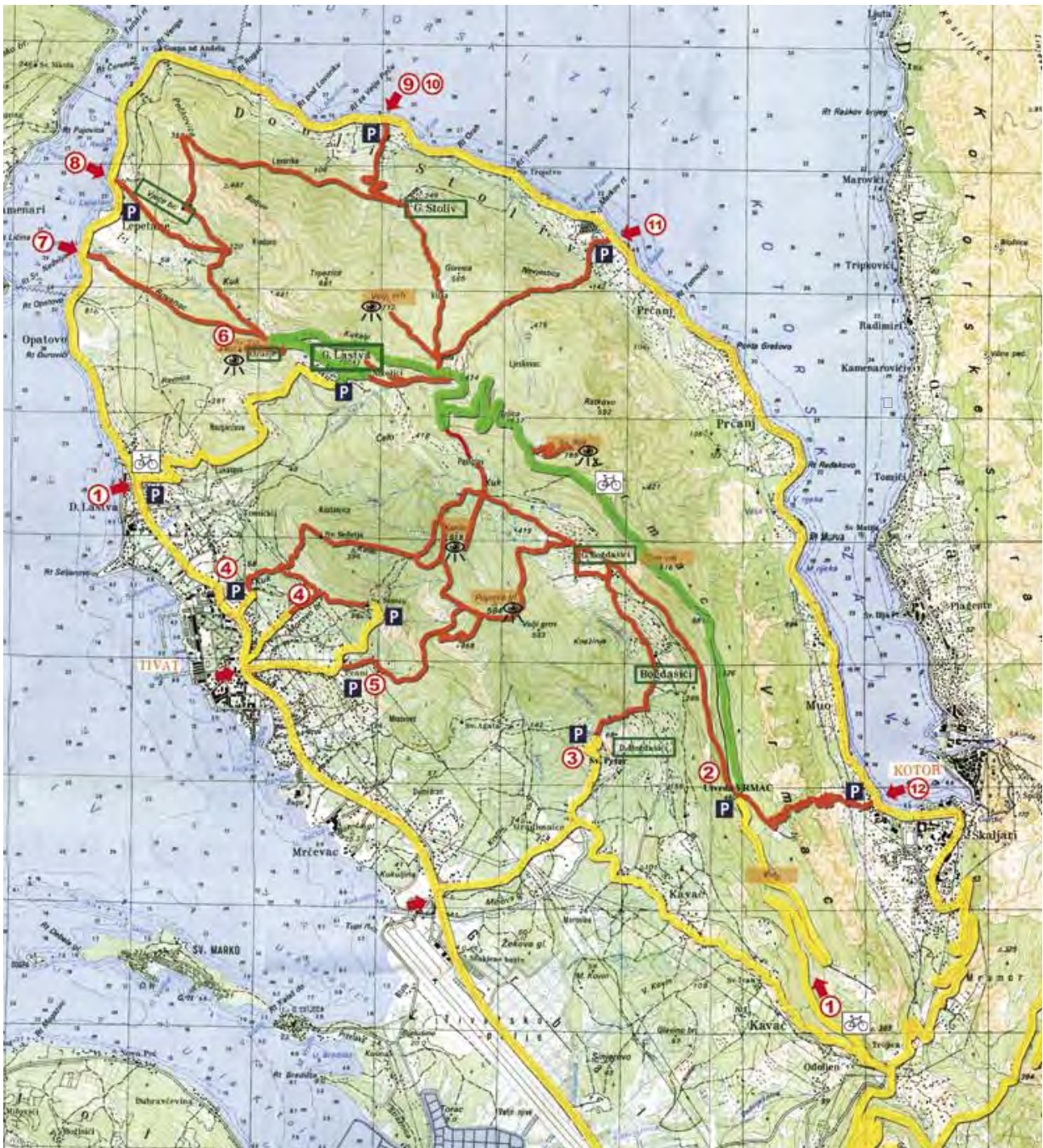
Lovćen walking routes. These mountains are criss-crossed with hiking paths and mountain-biking trails, which can be accessed from Kotor, Budva or Cetinje, and the Coastal Mountain Traversal runs straight through.

All peaks of this national park are quite accessible; you can almost drive to the top of Jezerski Vrh (1,675 m), Štirovnik (1,749 m) and Babljak (1,604 m) are both reached within the hour along marked trails. Various literature on the internet will states that Štirovnik is military area and not accessible. This does not seem to be the case any longer. If you want to visit a Lovćen high top with a minimal human footprint, Babljak is the best; there is a -partly- marked route to the top, and the path is hardly visible. From the top, you have a great view towards the other high peaks in the national park.

From Kotor to Cetinje is the best trail to cross Lovćen National Park by foot. This walking tour starts beside the wall of the old fortifications of Kotor. The path winds up the mountain all the way before levelling out as a visitor walks through the hamlet of Krstac and then on to Njegusi. Njegusi is a famous village because here born all the Kings of Montenegro and for its production of cheese and smoked ham. In the walking route it is possible to visit the mausoleum of the most revered King in Montenegro, at Stirovnik. The path ends in the Old Royal Capital of Cetinje going through beautiful wild countryside via the old traders' route.

Orjen walking routes. Roads from Herceg Novi, Morinj, Risan and Trebinje can access the massif of Orjen. On the mountain, there is a number of well-marked hiking trails. Easy hiking routes follow the former Austro-Hungarian military roads, such as the route Krivošije - Ledenice - Crkvice, or lead to some of the peaks of the mountain of Orjen. The following climbs are spectacular: Subra, Zubački kabao and Reovačka greda. In fact, ascent to the Subra (1,679 m) is one of the top rails according to Hiking Montenegro. Orjen is also the point where the Montenegrin coastal transversal begins and stretches along the ridges of the coastal mountains.

⁽⁴²⁾ The trail brochure is available: http://www.montenegro.travel/sites/montenegro.travel/files/multimedija/gallery/files/2014/06/1_tivat_vrmac_two_bays_trail_eng.pdf.



<http://www.gornjalastva.org/images/karta-web.pdf>

Map 9. Network of itineraries and walking routes in Mount Vrmac

3.2.2. Signals, sightseeing points, visitor centres and other interpretation infrastructure

One of the main characteristics of ecotourism is that contains educational and interpretation features. Therefore, ecotourism is an interpretation and learning experience. Local guides are the best way to interpret the cultural and environmental settings that visitors are coming to discover.

They also focus on helping travellers develop better instincts on how to travel and how to properly contribute toward environmental conservation, cultural survival other sustainable development issues. Local guides, or in case that ecotourists travel by themselves, usually need equipment to undertake this interpretation experience. Interpretation signals and panels, lookouts, hides, sightseeing points and visitor centres are the main examples of these interpretation infrastructures and equipment's.

According to the article 8 of the Law on Walking Routes, walking routes are marked with standardized tourism signalization, marks and other signalization intended to provide information and better orientation to the visitors. Size, dimension and content of touristic signals is regulated by the Ministry of Sustainable Development and Tourism. Depending on what type of walking routes, for the maintenance is in charge of the National Hiking club and the National Biking Club.

The old town of Kotor has plenty of interpretation signals. On every entry to the old town, there are maps with a short description. However, this signals focus on cultural settings.

There is no official list of sightseeing points. Majority of sightseeing points are located on the uplifted area above cities of Herceg Novi, Kotor and Tivat (Table 29).

Another interesting initiative by National Tourism Organisation of Montenegro is **Panoramic roads around Montenegro**⁽⁴⁴⁾. Four panoramic roads have been promoted

in Montenegro, one of which is “Sea and Heights”⁽⁴⁵⁾. This road, 590 km length, begins from the old walls of Herceg- Novi, and then down the coastline eastwards, all the way to the islands of Perast - St. George and Our Lady of the Rock. Then, it makes a turn towards the heights. In this road, the climb to the Saddle Krstac is an iconic experience because almost every metre of the asphalt road, scratched into the immense wall of Lovćen, is a viewpoint. Yet it is a narrow road, with a slope of up to 11%, and with very dense traffic.

Tourism visitors’ centres are available in every town but there is no specific ecotourism visitor centre. The only specific ecotourism visitor centre is in Ivanova Korita, the main hub in **Lovćen National Park**, where the National Park Visitor Centre is located. This visitor centre displays a wolf room – room dedicated to the characterized animal species of the region and the herbarium room naturalistic setting. Also there is a guide service which organizes groups of guests and visitors. Tourists can obtain guiding map with marked walking and hiking routes with diverse advertising materials.⁽⁴⁶⁾

Table 29. Existing and planned sightseeing points and lookouts in Boka Kotorska

Sightseeing points and lookouts		Description	Municipality
Existing	Kotor old town serpentines	The main sightseeing point in municipality Kotor is on old town serpentines where a visitor can see the entire bay of Kotor.	Kotor
	Lovćen National Park	In Lovćen National Park there are numerous sightseeing points and hides for wildlife watching complemented with telescopes for observation, some of them arranged recently ⁽⁴³⁾ .	Tivat
	Lovćen National Park Jezerski Vrh	From Jezerski Vrh (Jezerski Peak, 1,657 m) you can enjoy in many beautifully panoramas - to the huge massif of Orjen mountain, part of Boka Kotorska bay, Prokletije mountain range to the east, and many other mountains of Montenegro as are Durmitor, Skadarsko jezero (Scutari lake) and the town of Cetinje. In this peak, there is a mausoleum of the famous Montenegrin poet and ruler Petar II Petrovic Njegoš.	
	Vrmac hill	Many viewpoints are in this mountain. The best known is Gornja Lastva, a rural village situated far from the coast; in the silence of olive groves, it provides visitors a beautiful view of the Tivat bay.	Tivat
Planned	Solila salt marsh	In May 2013, Coastal Zone Management of Montenegro performed reconstruction of Solila in infrastructure such as gates, information boards and bridges. So far, there are information boards at the two main gates of the site, and the construction of a birdwatching tower close to the north gate is being planned.	Tivat
	Project of cable car Kotor-Lovćen-Cetinje	This project was presented in the summer 2013 by the side of municipalities of Kotor and Cetinje, Ministry of Sustainable Development and Tourism and European Bank for Investment and Development. Entire project is worth of 46.5 million of Euros. Cable car will be 15 km long and will have 4 stops (Dub, Kuk, Lovćen and Cetinje). This project will be promoted as the main sightseeing attraction for this region.	Kotor and Cetinje

Source: compiled by authors

⁽⁴³⁾ Source: National Parks of Montenegro

⁽⁴⁴⁾ More information: <http://www.panoramic.roads.montenegro.travel>

⁽⁴⁵⁾ More information http://www.montenegro.travel/sites/montenegro.travel/files/multimedia/www_montenegro_bild_studio_me/stranice/fajlovi/2012/02/panoramski_putevi_3_sea_and_heights_eng.pdf

3.3. Ecotourism supply and complementary activities

Ecotourism as a tourism segment is carried out by businesses that offer specialised products and services, especially tours and lodging. This chapter describes the main ecotourism supply that is present nowadays in Boka Kotorska. The chapter also presents complementary activities such as transport, local food production and other rural activities.

In those regions with a mature ecotourism market, most of the ecotourism products, activities and lodgings are certified by authorised organisms. In Boka Kotorska, though, there are no certifications such as European Charter for Sustainable Tourism as well as The European Ecotourism Labelling Standard in Montenegro or in Balkan.

3.3.1. Ecotourism products & activities

According to the National Tourism Strategy, Boka Kotorska is suitable for high-yield individual tourism. Its culture and landscape resources are immense and eminently suitable for various types of tourism: bathing and sports tourism, all kinds of regattas, rowing training in winter, diving, hiking, climbing, etc.

Specific ecotourism actions organized in Boka Kotorska are:

Bird watching. Tivat salina is the main ecotouristic attraction for bird watching in Boka Kotorska. Although the site is currently open to the public, there are no guided tours for tourist. However, many workshops with a topic of bird watching and energy preservation have been organized on this location. Moreover, the agency Montenegro+ features Stand-Up-Paddling (SUP), an eco-friendly way to explore this area but self-guided⁽⁴⁷⁾.

Cave visits. There is an offer of visiting Blue Grotto (Luštica Peninsula) with kayak⁽⁴⁸⁾. On boats its way to this location, local taxi boats make several trips to the Blue Grotto every day. There are many caves in the rural areas of Boka Kotorska but there are no organized sightseeing by tourist agencies or hiking clubs.

Hiking tours and mountain trekking. Walking tour excursions around Boka Kotorska are one of the most famous intangible tourism products from the seaside of Montenegro due to its natural beauty and breath-taking sightseeing points. As presented in section 3.2.1., there are several hiking routes in Boka Kotorska. So far, there are only three hiking clubs in

Boka Kotorska: Pestingrad and Vjeverica from municipality Kotor and Subr from municipality of Herceg Novi. Each hiking club has their own official web page with information on any of the planned tours. On the other hand, some travel agencies as Adventure Montenegro and Miro & Sons offer walking tours around Lovćen National Park that usually depart from Kotor. Moreover, in the Lovćen National Park visitor's centre, ecotourists can arrange guided tours.

Cycling through landscapes of natural interest. This activity is organized in the hiking and mountain trails described in the previous section. Also there is an old concrete road from Kotor along the mountain Lovćen which is perfect for this activity but most of these actions were organized individually.

Kayaking. As part of touristic offer, almost on every beach there is a possibility to rent pedal and small plastic boats and small kayaks. These water "vehicles" are mostly used for visiting neighbouring places that cannot be reached by foot such as caves, points for diving, etc. Kayak activities are spread along Boka Kotorska, especially to visit the Blue Grotto in Peninsula Luštica and the Solila salina in Tivat.

Scenic boats. In every harbour there are numerous boats offering the service of transportation to different location which can be reached by foot or car as well as sightseeing of the coastal zone from the sea.

Diving. There are several diving clubs in the coastal area of Montenegro. In Boka Kotorska they are: «Neptun - Mimoza» Tivat and "Diving Montenegro" Herceg Novi. Clearness of the sea, diversity of marine flora and fauna, beauty of underwater relief, unexplored underwater territory is everything that appeals to the diving enthusiast and every this can be found in Boka Kotorska bay area. These clubs offer diving lessons no matter on the previous experience as well as renting the equipment and boat for this type of activity. They also organize the sightseeing excursion where they dive and examine the boat wrecks, underwater caves and other locations included in the marine depth of Boka Kotorska⁽⁴⁹⁾.

3.3.2. Eco-lodges and other kinds of lodgements

The expression "Ecolodge" identifies a building designed to house ecotourists, typically built and supported by local labour and with respect for the environment. The document "ECO Lodge concept for Montenegro"⁽⁵⁰⁾ discusses the principles of ecotourism and their implementation in Montenegro.

⁴⁶ <http://www.nparkovi.me/sajt/>

⁴⁷ More information here: <http://montenegroplus.me/solila-stand-up-paddling-sup/>

⁴⁸ Source: <http://montenegroplus.me>

⁴⁹ Montenegroholiday.com, divingmontenegro.com

⁵⁰ GTZ, the German Technical Cooperation (2008). *ECO Lodge concept for Montenegro*. Ministry of Tourism and Environmental Protection. Ministry for Economic Development. Available here: http://www.montenegro.travel/sites/montenegro.travel/files/multimedija/gallery/files/2013/02/eco_lodge_gtz_montenegro.pdf

ECO Lodge is an accommodation with low impact on environment, designed and constructed to be ecologically and socially acceptable. The objects are constructed with numerous ecologically acceptable options like: water heating using a solar energy, systems for rainwater collection, composting toilets and renewable energy sources like wind power. On the other hand, each ECO Lodge has to be materialized so that it suits environmental characteristics of the location and that it is in harmony with the environment. Having in mind all the ECO Lodge characteristics, they are most suitable for national parks and other protected areas.

Only one eco-lodge has been identified in Boka Kotorska: **the Eco hotel Carubba**⁽⁵¹⁾ in the village of Donja Lastva, municipality of Tivat. Nestled in a 19th century building, the hotel was refurbished and fitted with advanced green technologies such as solar panels, modern waste-water treatment system and geothermal heating. Marble, wood and granite were used in refurbishing. With the implementation of the energy efficiency measures in the object operation and fitting into a landscape environment, this hotel can certainly serve as a good example of eco practice in the coastal zone. However, this facility still has poor sewage and water disposal system and poor promotion of eco-tourism in Montenegro.

In other part of the country, resorts of bungalows offering outdoor activities are quite developed, under the name of **ethno-villages**, being the first of them the Montenegro ethno-village, founded in 2006 at the Komarnca river. No ethno-villages have been identified in Boka Kotorska, although there are several camp places where visitors can stay and enjoy the nature. In Herceg Novi, there are 12 camp sites located along the road and in the rural areas while in Tivat are 5 and Kotor only 2.

3.3.3. Public and sustainable transport

So far, use of public and sustainable transportation in Boka Kotorska has been limited when it comes to the ground transportation, as there are no railroads reaching this part of the Montenegrin coast. The closest train station is in Bar, in the Montenegro Riviera. Local and regional buses, as well as taxis, are easily found in the main cities.

Electrical bicycles can be only seen in small village called Perast, part of municipality Kotor, as part of Car Free village initiative⁽⁵²⁾. Tivat has also developed a project of public bikes⁽⁵³⁾, which at the moment is having some problems of maintenance. In any case, it is not strange that hotels offer bicycles to their customers. Certain ecotouristic

attractions, such as the beaches of the bay, mount Vrmac and Solila are easily accessible by bike.

Horseback riding is not recognized so far by the locals as an interesting and interactive sport so there are no horseback riding clubs in Boka Kotorska. Marine transportation is mainly used by the local population for the purpose of fishing and transportation to the neighbouring areas. An important project which should contribute to the overall tourism in Boka Kotorska is the construction of cable car between Kotor and Cetinje.

3.3.4. Local food production and restaurants

When it comes to the agriculture and production of local food, this area has a very favourable climate and excellent geomorphologic characteristic. Agriculture of the Boka Kotorska region is mainly focused on the fruits, vegetable, olives, beekeeping and vine. Boka Kotorska's traditional gastronomy is very representative of the Mediterranean cuisine, with seafood being a common dish.

Even though in this region there are favourable natural conditions for agriculture, cooperation with tourism as a main economic branch is not strong enough, and it is only demonstrated by providing local food and supplies to the small restaurants and groceries stores. Local agriculture and food product could be more presented to the foreign tourist in the local restaurants and hotels. An interesting example is the "honey trails and tales" near Cetinje. Other barriers for development of this economy are:

- Old technology and capacity for agriculture production, including manufacturing and packing;
- Lack of product standardization and poor competition;
- Lack of institutional cooperation between agriculture manufacturers;
- Lack of motivation within local population.⁽⁵⁴⁾

Main restaurants with local cuisine are Prova, Tri Lipe, Zotto Cappelino, Stari Milini, Tramontana, etc. List of restaurant with local cuisine is provided on the official website of Montenegrin tourism⁽⁵⁵⁾.

The development of handicrafts and traditional products are even less developed in the region, and the main souvenirs that tourists buy in the main touristic sites are produced outside of Boka Kotorska, even outside of Montenegro.

⁽⁵¹⁾ <http://www.septemberhotels.com/en/hotels/carruba-tivat>

⁽⁵²⁾ <http://www.kotor-bay.com/perast/>

⁽⁵³⁾ <http://www.biketivat.com/>

⁽⁵⁴⁾ Ministry of Economy.

⁽⁵⁵⁾ <http://www.montenegro.travel/en/mjesta-kategorije/wine-and-dine>

3.3.5. Rural activities

According to the claims of Ministry of Agriculture and Rural development, tourism is the opportunity that will help developing rural areas in Montenegro. When it comes to Boka Kotorska, possible activities which can be offered to the tourist who are interested to visit rural area are: accommodation and interactive services such as fruit picking, going on fishing tours, collecting and cooking mussels, wine tasting and visits to wineries, cooking lessons, traditional entertainment in a local tavern, etc. Having interactive offer of activities with tourists helps in service distinction.

It is important to mention that rural heritage is an important segment of cultural-historic heritage and unique history record of the society. Rural heritage is currently under big risk: migration from rural areas and intense urbanization of city areas that is destroying cultural heritage and natural scenery. In order to attract attention to this problem, the "Heritage" project organized a conference on "Rural heritage in south-eastern Europe" in April 2013.⁽⁵⁶⁾

On the other hand, no ecotourism facilities have been identified in the rural area of Boka Kotorska.

3.4. Ecotourism destination marketing initiatives

This section tries to identify the main marketing tools and initiatives to promote Boka Kotorska as an ecotourism destination and to promote the main ecotouristic sites, attractions and activities.

3.4.1. Websites and social networks

There are no specific websites for Boka Kotorska as a tourism destination. In addition, there is not a specific website to promote ecotourism in the bay.

However, Montenegro is actively working on online promotion of tourism. Tourist offer is promoted through campaigns on TripAdvisor, in WAYN, Krstarica, as well as on other social networks such as Facebook, Twitter, blogs, mobile platforms etc.⁽⁵⁷⁾, Montenegro as a tourist destination has its place on: Booking.com, YourTour, Appnestic, TrustYou, National Geographic, Lonely Planet and other websites aimed to travelling.

Important websites that are promoting tourism in general and ecotourism in Montenegro are mentioned in the following table (P. 68).

Besides these websites, each municipality in Boka Kotorska has its own web page of the local Tourist Organization (Kotor - <http://www.tokotor.me/en>, Tivat - <http://tivat.travel/en/> and Herceg Novi - <http://www.hercegnovi.travel/>) where all relevant touristic information is posted.

Other national websites where you can find specific (but poor) ecotourism information in Boka Kotorska are:

- Montenegro National Parks: <http://www.nparkovi.me/sajt/> (only in Montenegrin).
- Montenegro's Mountaineering Association: <http://www.pscg.me/en/>.

Finally, it is interesting to look at Trip Advisor, one of the main travel website of the world with user-generated content. Kotor is the second most popular destination in Montenegro, Herceg Novi the fourth and Tivat the fifth.

3.4.2. Promotional materials: brochures, leaflets and others

Besides websites, there are also brochures, leaflets and maps on the ecolodges, national parks, hiking routes, national products and cuisine, etc.

Promotional materials edited by National Tourism Organisation of Montenegro. National Tourism Organisation of Montenegro has edited and published several promotional materials that can be related to ecotourism in Boka Kotorska:

- Montenegro Wilderness Hiking & Biking Factsheets and update ⁽⁵⁸⁾
- Montenegro Wilderness Biking 17 trails road book Mapflyer ⁽⁵⁹⁾
- Tivat Vrmac two bays hiking trail ⁽⁶⁰⁾
- Panoramic roads around Montenegro ⁽⁶¹⁾
- Map of beaches ⁽⁶²⁾
- Montenegro Wilderness Hiking Map ⁽⁶³⁾

⁽⁵⁶⁾ Official web page of NGO EXPEDITIO (www.expeditio.org/en.html) and "Heritage" project (www.bastina.eu)

⁽⁵⁷⁾ <http://m.vijesti.me/vijesti/divlja-ljepota-se-slabo-vidi-internetu-clanak-138182>

⁽⁵⁸⁾ http://www.montenegro.travel/sites/montenegro.travel/files/multimedija/gallery/files/2014/06/montenegro_wilderness_hiking_biking_factsheets_2011.pdf

⁽⁵⁹⁾ http://www.montenegro.travel/sites/montenegro.travel/files/multimedija/gallery/files/2014/06/roadbook_montenegro_biking_flyer_2009.pdf

⁽⁶⁰⁾ http://www.montenegro.travel/sites/montenegro.travel/files/multimedija/gallery/files/2014/06/1_tivat_vrmac_two_bays_trail_eng.pdf

⁽⁶¹⁾ http://www.montenegro.travel/sites/montenegro.travel/files/multimedija/gallery/files/2014/02/panoramic_roads_around_montenegro_2014-1.pdf

⁽⁶²⁾ http://www.montenegro.travel/sites/montenegro.travel/files/multimedija/gallery/files/2013/02/maps_of_beaches.pdf

⁽⁶³⁾ http://www.montenegro.travel/sites/montenegro.travel/files/multimedija/gallery/files/2013/02/wilderness_hiking_map_eng_0.pdf

www.montenegro.travel is the official website of the National Tourism Organisation of Montenegro. Commercial entities, under the umbrella brand «Montenegro-Wild beauty», represent their offer to the Internet users worldwide.

From the ecotourism point of view, information provided through this website is the following:

- > Ecotourism activities in Montenegro: places where you can practise and travel agencies that offer each one. The activities promoted are **photo safari, biking, kayaking, mountaineering, bird watching, diving and hiking**.
- > **Ecotourism lodges** located on the north of Montenegro.
- > **Nature and public areas**: national parks, rivers, caves, panoramic views, beaches, etc. that can be filtered by municipality.
- > **Panoramic roads**: one of which, **Sea and heights**, begins at Boka Kotorska.

Montenegro Travel has also a **Facebook page, Twitter channel, Pinterest, Youtube, Flickr** and **Google Plus**.



www.visit-montenegro.com provides information on the accommodation, how to get in Montenegro, transportation and important attractions.

Regarding ecotourism, it presents information on ecolodges located in North Montenegro, activities such as hiking and biking, weather conditions, cultural attractions, etc.

Visit Montenegro has also **Facebook page, Twitter channel** and **YouTube page**. In addition, it has developed a blog titled “**Best of Montenegro**”.



www.reciklirajte.me is the first ecology portal in Montenegro where relevant topics such as environment preservation are discussed. This portal, only in Montenegrin, also provides information on ecolodges in Montenegro where a person can relax, away from crowded city.



- Montenegro Wilderness Biking Map ⁽⁶⁴⁾
- Unique Guidebook to “Wilderness Biking Montenegro” ⁽⁶⁵⁾

In addition, Montenegro Travel has published in Trip Advisor a short video⁽⁶⁶⁾ related to Montenegro Wilderness Hiking & Biking.

Promotional materials edited by NGO and other institutions

The non-profit organisation “Gornja Lastva” regularly edits maps and leaflets about walking and biking itineraries in mount Vrmac. The last one is the leaflet “Vrmac Hiking paradise” that includes a map.

Visit-Montenegro.com has edited a brochure⁽⁶⁷⁾ with information about Lovćen National Park.

Tourist Board of Kotor, Port of Kotor and Maritime Museum of Montenegro have been sponsored “Kotor for all seasons” ⁽⁶⁸⁾, a promotional film of Kotor focused on history and culture and filmed from June 2012 to May 2013.

3.4.3. Promotional events

There are no specific ecotourism promotional events in Boka Kotorska and Montenegro. The promotional events organised in Boka Kotorska are mainly focused on promoting local products, culture, cuisine and history. So far there are no events focused only on the promotion of ecotourism but they may be incorporated through different festivals, carnivals, etc. Events in Kotor that may be related to ecotourism:

Underwater Film Festival (Kotor): for several years in Kotor, during June, a festival oriented to underwater films is held to promote the richness of the marine waters of Montenegro and through the screen to depict underwater, diving and surveys of the seabed. Besides movies from Montenegro, the visitors can see movies on the seabed of the countries from the region and some of the European countries.

Days of Camellia (Kotor): a manifestation held in March, for which Kotor housewives and flower growers

⁽⁶⁴⁾ http://www.montenegro.travel/sites/montenegro.travel/files/multimedija/gallery/files/2013/02/wilderness_biking_map_eng_0.pdf

⁽⁶⁵⁾ <http://www.montenegro.travel/en/content/unique-guidebook-wilderness-biking-montenegro>

⁽⁶⁶⁾ <http://www.tripadvisor.es/LocationPhotoDirectLink-g635648-i58406077-Montenegro.html>

⁽⁶⁷⁾ <http://www.visit-montenegro.com/downloads/brochure/NP-LOVCEN.pdf>

⁽⁶⁸⁾ <https://vimeo.com/68085730>

in the Bay of Kotor are preparing during all year. In honor of a beautiful flower, camellia, which during the spring adorns all Kotor gardens, there is an exhibition of flowers, art exhibitions, theater performances on the day. However, the most important thing to point out is the «Camellia Ball» and the selection of ladies of camellia. This is usually a famous female person, that social engagement, sacrifice and the achievements of the previous year candidate for the title «Lady of camellia.»

«**Mimosa days**» (Herceg Novi): the most important tourist manifestation organized from 1969. It last for whole February. Mimosa Festival is a celebration honoring the mimosa flower. What is special for this manifestations are young Novljanke called majorettes and brass music. A numerous touristic, entertainment, cultural and sport programmes are organized within the festival.

«**Ekofest**» (Herceg Novi): only Ecological Cultural and Educational festival in Montenegro festival was organized in 2011 with a goal of ecology promotion and environment preservation.

3.4.4. Communication through mass media

Media in Montenegro devote a lot of attention to tourism. Their repertoire includes primarily various tourism promotional materials, and they regularly report on developments in this area: the organization of events, the Montenegrin delegation visits to tourist markets and fairs, signed contracts with tour operators, investments in tourism... Also, usually on a monthly basis, during the season, data are reported on guests and overnight stays, indicating a trend (increase/decrease) in comparison with the same period last year.

There is no specific ecotourism communication in Boka Kotorska and Montenegro. With an exception: on radio Jadran there is a show called “Eco minute” which focuses on the eco villages and ecotourism in Montenegro. On the other hand, any tourism activity that is promoting organic food, healthier lifestyle and sustainable energy in a way promotes all ecotourism implementation projects in Montenegro.

3.5. Ecotourism stakeholders

Ecotourism stakeholders are organisations and entities, both public and private, which by themselves or because of their capacity of influence can have a strong impact in the development of ecotourism. This section describes the main stakeholders in the tourist sector in the region of Boka Kotorska.

Five great groups of stakeholders have been identified, plus a sixth unorganised group which is formed by ecotourists themselves. The figure 6 presents a sociogram of the ecotourism stakeholders in Boka Kotorska.

Ecotourism stakeholders are described below. As we explained in the methodology section (1.3), some of these stakeholders have been interviewed (those marked with a (*) sign) during the elaboration of this Feasibility Study.

3.5.1. Private sector

The private sector involved in ecotourism is represented by all those private agents that carry out their tourist activity (or could potentially do it in the future) such as: guiding and specialized hiking companies, providers of active tourism, operators and travel agencies of specialized travel activities, small hotels and guesthouses in rural areas, investors, transportation services providers, local entrepreneurs ,etc.

A number of travel agencies, dealing with organized visits to various sites, are acting in Boka Kotorska (Table 30).

Listed agencies are specialized in organizing excursions, accommodation and transportation services. There is no agency in the seaside region of Montenegro that is oriented only toward ecotourism. Most agencies are small- and medium-sized and have insufficient capacity to promote new initiatives on ecotourism. In addition, there is an irregular language proficiency in some foreign languages (English, Russian, Italian...).

Other relevant stakeholders in the private sector are accommodation services (Amongst all accommodation services, Hotel Cattaro (in Kotor) was interviewed.), restaurants, commerce, and yacht clubs in the marinas. More information about these stakeholders is available as an annex to the Feasibility Study.

3.5.2. Public sector

In the area of the natural environment, the organisms responsible for the conservation of nature and landscape have an obvious leading role. These organisms include the management bodies of protected nature reserves, nature protection and the universities –that contribute with knowledge and research. In the area of tourism, the leading role is for the organisms that are responsible of tourist planning, rural development, and the numerous organisms that help promote tourism.

A number of public bodies deal with issues of tourism. Among them, the most important are mentioned in the Table 31.

3.5.3. Educational institutions and research centres

University of Montenegro. The University of Montenegro (Official web page: <http://www.ucg.ac.me/eng/>) was founded in 1974 and has been developed in accordance with the growing needs of Montenegro.

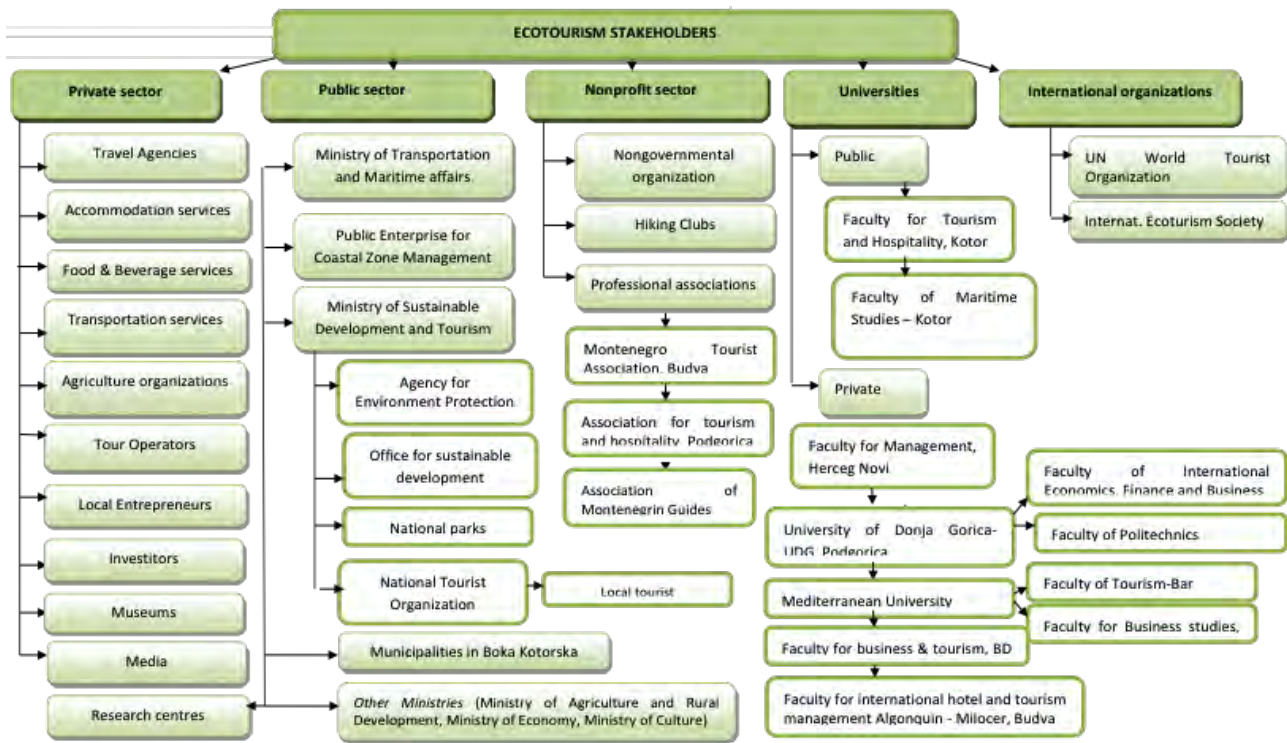


Figure 6. Tourist's Ecotourism stakeholders in Boka Kotorska

Table 30. Travel agencies

Adventure Montenegro* (Kotor)	Active Holidays Specialist that offers multi day and single day active tours at Adriatic sea and Montenegro mountains: walking, sea kayaking, rafting, hiking, fishing... They offer guided visits to Lovćen and Vrmac.
Miro & Sons* (Kotor)	Guiding agency Miro & Sons providing experienced and professional tour guides in English, German, Russian, Italian, French, Spanish, Albanian and Montenegrin.
Adria travel	Agency dealing with bookings in all categories of accommodation organization of one day trips or tailored tourist packages for groups (companies, organisations, sport associations, holidays for school children), etc.
Perfect Travel	Engaged in the sale of air tickets for the whole world, selling travel arrangements both in Montenegro and abroad, and providing hotel and private accommodation. Organizing transfers, car rental and rent-a-boat services, insurance, language courses, as well as organizing attractive trips.
Globtour Montenegro	One of the oldest tourist agencies in Montenegro. It was formed in 1977 and for almost 35 years, it has been providing travel services and representation of foreign tour operators in Montenegro. The agency organizes excursions and cruise tours, transfers, individual arrangements, congresses and conferences, and special events.
Labosta	Travel agency that operates since 1997 and organizes day trips to Montenegro and the region.
Montenegro Travel Idea	Travel agency offering a wide choice of holidays in Montenegro, with great value excursions and accommodation as well as variety of tourist services.
Montenegro +	Montenegro+ offer adventure sports tours around Montenegro and especially in Boca Kotorska: SUP and Kayak around the Bay of Kotor, rock climb above Tivat, Mountain Bike in Mount Vrmac. They also do kayak trips to the Blue Cave in Luštica peninsula and Solila.
Cipa	On-line agency that books activities and accommodation in Montenegro

Today it is situated in Podgorica, Nikšić, Cetinje, Kotor, Herceg Novi, Bar, Bijelo Polje, Budva, Pljevlja and Berane. It includes 20 faculties, three institutes and two independent study programs. Almost every faculty besides undergraduate studies offers post graduate, master and PhD studies (Table 32).

University "Mediterranean". Located in Podgorica, was founded in 2006 and at that time, was the first private university established in Montenegro. The university is member of the Balkan Universities Network. It is organized in 6 undergraduate faculties, 5 postgraduate and 1 PHD studies (Table 33-34).

Table 31. The most important public bodies dealing with issues of tourism

Ministry of Sustainable Development and Tourism (MSDT)*	MSDT is in charge of Environmental policy (horizontal issues, air, climate change, nature, waste, industrial pollution and risks control, chemicals, noise), communal affairs, spatial planning (national, special purpose and detailed spatial plans, state studies of locations) and construction (issuance of construction permits for objects based on spatial plans under its competence); tourism development. MSDT includes inspections for all the areas under its competence except environment (environmental inspection is under EPA). MSDT however coordinates implementation of master plans for water supply and wastewater collection and treatment and work of communal enterprises/ service providers – local and regional).
Ministry of Agriculture and Rural Development*	Ministry of Agriculture and Rural Development is responsible for measures of current and development policy in agriculture, protection, utilization and improvement of agricultural land, crop production (agriculture, horticulture and viticulture and plant protection), farming (production, cultivation, protection and development of all types of livestock); development of beekeeping; freshwater and marine fisheries, rural development, financing of production and development; balance of basic agricultural products, agro-industry, development, economic exploitation and improvement of forest hunting and hunting ground, plant protection from plant diseases and pests; regime of water use and water supply, protect water from pollution, use of water resources, economic relations and public companies in these areas; administrative control of the areas for which the Ministry has been established, as well as other activities that are defined in the jurisdiction.
Coastal Zone Management Authority	The Coastal Zone Management Authority of Montenegro was established in 1992 with the aim to manage the coastal zone in order to provide the protection of the area and to ensure its proper arrangement and sustainable development. Main activities are: renting of the beaches and locations for seasonal tourist and service objects during the summer season, building and maintenance of the coastal infrastructure such as sea walls, ports, docks, and other public areas, management of the local ports, monitoring of the bathing water quality on beaches, international cooperation and participation in international projects, promotion of environmental protection, participation and cooperation with local municipalities and national agencies in management of protected areas (such as Solila site in Tivat) and other environmental issues.
Agency for environmental protection	The Environmental Protection Agency is competent for environmental protection affairs such as licensing, monitoring, Environmental inspection, communication with relevant domestic and international bodies and organizations, as well as with the public.
Office for Sustainable Development	The Office operates within the General Secretariat of the Government of Montenegro, outside ministries and deals with all pillars of sustainable development. Office is responsible directly to the Prime Minister, who also chaired the work of the Council. It prepares and implements plans and projects in accordance with the purposes and principles of sustainable development and the priorities established by the document «Directions of Montenegro as an Ecological State,» co-operation with international organizations to provide overseas assistance for priority projects for sustainable development, spread awareness and encourage activities in the field of sustainable development at all levels.
National parks of Montenegro*	National Parks of Montenegro is responsible for the protection and management, preparation and implementation of protection; control the use of natural resources, establishing internal policies and promotion, in accordance with relevant laws and regulations. This organization is a member of the European Federation, an international organization of national parks.
National Tourism Organisation of Montenegro*	They plan and carry out the tourism informational and promotional activities of Montenegro both in the country and abroad, create the annual program for informational and promotional activities of the state; follow and analyse trends on the domestic and international tourism markets and carry out tracking studies; create the conditions and provide the means for affirmation of tourism values and potentials by way of publications, exhibits at tourism shows, presentations etc.; create and develop a tourism information system in Montenegro and enable it to be connected with other information systems in the country and abroad; co-ordinate and unite the informational and promotional activities of all tourism subjects and co-operate with tourism organizations in the country and abroad.
Local municipalities*	Boka Kotorska municipalities (Herceg Novi, Kotor and Tivat) have competences on urban planning and economic promotion. In fact, each municipality has its own local Tourism Organisation (TO Kotor*, TO Herceg Novi, TO Tivat), operating on the local level. By now, they are not officially coordinated amongst them.

Table 32. Some faculties of the University of Montenegro

Faculty for Tourism and Hotel Management, Kotor*	Its mission states that through scientific- educational unit and teaching curriculum, educates youth population by creating knowledgeable human resources in the area of social science, capable for implementing the knowledge gathered in this Faculty in Montenegro and entire world.
Faculty of Maritime Studies – Kotor	Educational curriculum is organized as part of academic studies (nautical science and nautical management contains both of basic postgraduate and master studies) and Applied studies (nautical, machinery, naval electro technology). Faculty of Maritime studies in Kotor is the first higher education facility in Montenegro which for 200 years is in accordance with ISO 9001 standards.
Faculty for Management in Herceg Novi	Founded in 2009. After finishing third year education studies, their student acquires bachelor degree in management as well as Supplement Diploma. Faculty is located in Igalo, municipality of Herceg Novi. As part of basic studies there are four orientation courses: Tourism and hospitality; Finances, accounting and banking; Taxes, custom and insurance; Business informational system and e-business.

Table 33. Some faculties of the University «Mediterranean»

Faculty of Tourism Bar – MTS – "Montenegro Tourism School"	Founded in 2004 as a first privately owned high education faculty in Montenegro. This faculty is organized in two orientation courses: Tourism management and Hotel management.
Faculty for Tourism and Business from Budva	Its mission is the scientific research of tourism and accommodation, education of managers with leadership characteristic, creating the balance of general education, professional knowledge and managerial skills, lifelong education in the area of hospitality and tourism. This faculty offers one course for the undergraduate studies, one course for the postgraduate studies and one course for the master studies. Entire curriculum of this educational institution is focused towards Hospitality and Tourism Management.
Faculty for International Hotel and Tourism Management Algonquin - Miločer	<i>Budva</i> has a mission of becoming globally recognizable as the Hotel Educational Centre, a place to educate students, employees, employees and future leaders. By providing knowledge on the general skills, qualification and working experience required by the tourism and accommodation industry, their programs are designed to provide the knowledge in theory and practical use which is always defined as a good start of professional career. Besides the courses of International management in hotel business, this college offers the courses for specific job positions such as cook, waiter, hotel butcher, baker, chambermaid, supervisor, general hotel supervisor, receptionist, wellness employee, animator, pizza maker and bartender.

Table 34. Research centres

Regional Centre for Divers Training and Underwater Demining	Trains divers all around the world to properly handle and dismantle weapons located underwater. Since the 2002, when this organization was formed, they have removed more than 120 tons of explosive materials. This research centre is also in charged for observation of marine ecosystem as well as their preservation.
Marine Biology Institute	Located in Kotor, is in charge for observation of the marine fauna in Boka Kotorska bay area as well as in the entire coastal region of Montenegro. Besides observation, they are making numerous testing in the areas of chemical, biochemical and molecular biology; Fish observation and fishery; General biology and sea protection; Exploratory research and mariculture; and marine studies
Institute for entrepreneurship and economic development*	Institute for entrepreneurship and economic development (IEED) is an economic think tank established with the aim to provide support in development of entrepreneurship and private sector in Montenegro. It was founded in 1993 at the Faculty of Economics of University of Montenegro.

3.5.4. Non-profit organisations

There are several non-profit organisations involved in environmental preservation, protection of historic monuments, promotion of healthier life styles, etc. A table with a list of NGOs and description of its activity is available

as an annex to this study; however, the main NGOs in the region are listed in the table 35.

So far, there are no proposals concerning ecotourism, but some of the NGOs are promoting and organizing ecotourism related activities such as hiking and biking.

Table 35. Main NGOs in the region

NGO Expeditio*	Their action is referred to environmental policy, planning, protection of cultural and natural heritage, energy efficiency in buildings and enhancing cooperation between coastal municipalities. It has developed a project of Benefit Living /a new layer of creative building and planning in Montenegro. Information on the project can be found on the website of this organization.
Delfin (Kotor)	Is involved in environment preservation from illegal trash disposal.
Gornja Lastva*	Gornja Lastva is a nongovernmental organization founded for the sake of preservation and improvement of cultural identity, preservation of traditional customs and architectural heritage, especially related to the recuperation of the old village of Gornja Lastva in Mount Vrmac through sustainable tourism and ecotourism initiatives.
Ekoboka	Performs estimate on the environment and helps in making of planned documentation for spatial planning.
Nautilus	Organisation focused on marine issues.
National Hiking Club	Organisation focused on hiking activities.
National Biking Club	Organisation focused on biking activities.
Pestingrad Hiking Club	Organisation focused on hiking activities, situated in Kotor.
Vjeverica Hiking Club	Organisation focused on hiking activities, situated in Kotor.
Subra Hiking Club	Organisation focused on hiking activities, situated in Herceg Novi.
CZIP (Centre for Protection and Research of Birds of Montenegro)*	Founded in Podgorica in December 2000, their mission besides bird watching and protection of their habitat is also monitoring of the fauna, civil education and cooperation with other organization from Montenegro and abroad in the area of environment protection. So far, they have realized several projects from numerous institutions, and they are participating in the restoration of Solila (Tivat Salina) through the project ORNIBA. They are members of International Union for Conservation of Nature and Bird Life International.

3.5.5. International organisations

Table 36. Main International Organisations acting in the region

United Nations Environment Programme (UNEP)	The United Nations Environment Programme (UNEP) has developed the Mediterranean Action Plan (MAP), related to the Barcelona Convention. Through the MAP, the Contracting Parties to the Barcelona Convention and its Protocols are determined to meet the challenges of protecting the marine and coastal environment while boosting regional and national plans to achieve sustainable development. Montenegro is one of the contracting parties of the Barcelona Convention. The UNEP-MAP is structured in Regional Activity Centers, amongst which The Regional Activity Centre for Specially Protected Areas (RAC/SPA) and the Regional Activity Centre for Sustainable Consumption and Production have been actively involved in CAMP Montenegro, and especially in the development of this Feasibility Study.
World Tourism Organization (UNWTO)	United Nations agency responsible for the promotion of responsible, sustainable and universally accessible tourism. As the leading international organization in the field of tourism, UNWTO promotes tourism as a driver of economic growth, inclusive development and environmental sustainability and offers leadership and support to the sector in advancing knowledge and tourism policies worldwide. UNWTO's membership includes 156 countries, among which is Montenegro, since 2007.
The International Ecotourism Society (TIES)	Non-profit organization dedicated to promoting ecotourism. Founded in 1990, TIES has been on the forefront of the development of ecotourism, providing guidelines and standards, training, technical assistance, and educational resources. TIES' global network of ecotourism professionals and travelers is leading the efforts to make tourism a viable tool for conservation, protection of bio-cultural diversity, and sustainable community development. Through membership services, industry outreach and educational programs, TIES is committed to helping organizations, communities and individuals promote and practice the principles of ecotourism. TIES currently has members in more than 120 countries, representing various professional fields and industry segments including: academics, consultants, conservation professionals and organizations, governments, architects, tour operators, lodge owners and managers, general development experts, and ecotourists(http://www.ecotourism.org/ties-overview). Montenegro is not member of TIES, so far.

3.5.6. Ecotourists

According to the report “ECO Lodge Concept for Montenegro” (Ministry of Economy in partnership with Ministry of Tourism and Rural Development, 2008. More information here: http://www.velikaplaza.info/gallery/brosure/ECO_Lodge_Concept_for_Montenegro.pdf), ecotourists are coming from all over the world. They are of all ages, with a significant component of middle-aged travellers and tend to be more highly educated professionals with moderate to high income. When it comes to the gender differences, slightly more ecotourists are women than men. According to that report, “Tourists are seeking a more interactive tourism, with greater respect for social- cultural and ecological interests of the local communities, higher standards of service along with the ability to protect and regenerate the natural environment and local customs”. Most important motivations for the ecotourists around the world is to enjoy natural environment, have

“experiential” vacation and to learn while traveling. When it comes to specific action, majority of eco tourists will decide for admiring scenery, viewing wildlife, hiking and taking guided interpretive tours and visiting parks and protected areas. Characteristics of potential ecotourists in Boka Kotorska are similar to those given by the definition of the International Ecotourism Society: like to travel, involved in environment preservation, interested to experience other cultures, like active holidays, different ages, highly educated, have moderately to high income, etc.

3.5.7. Role of the main stakeholders of ecotourism in Boka Kotorska

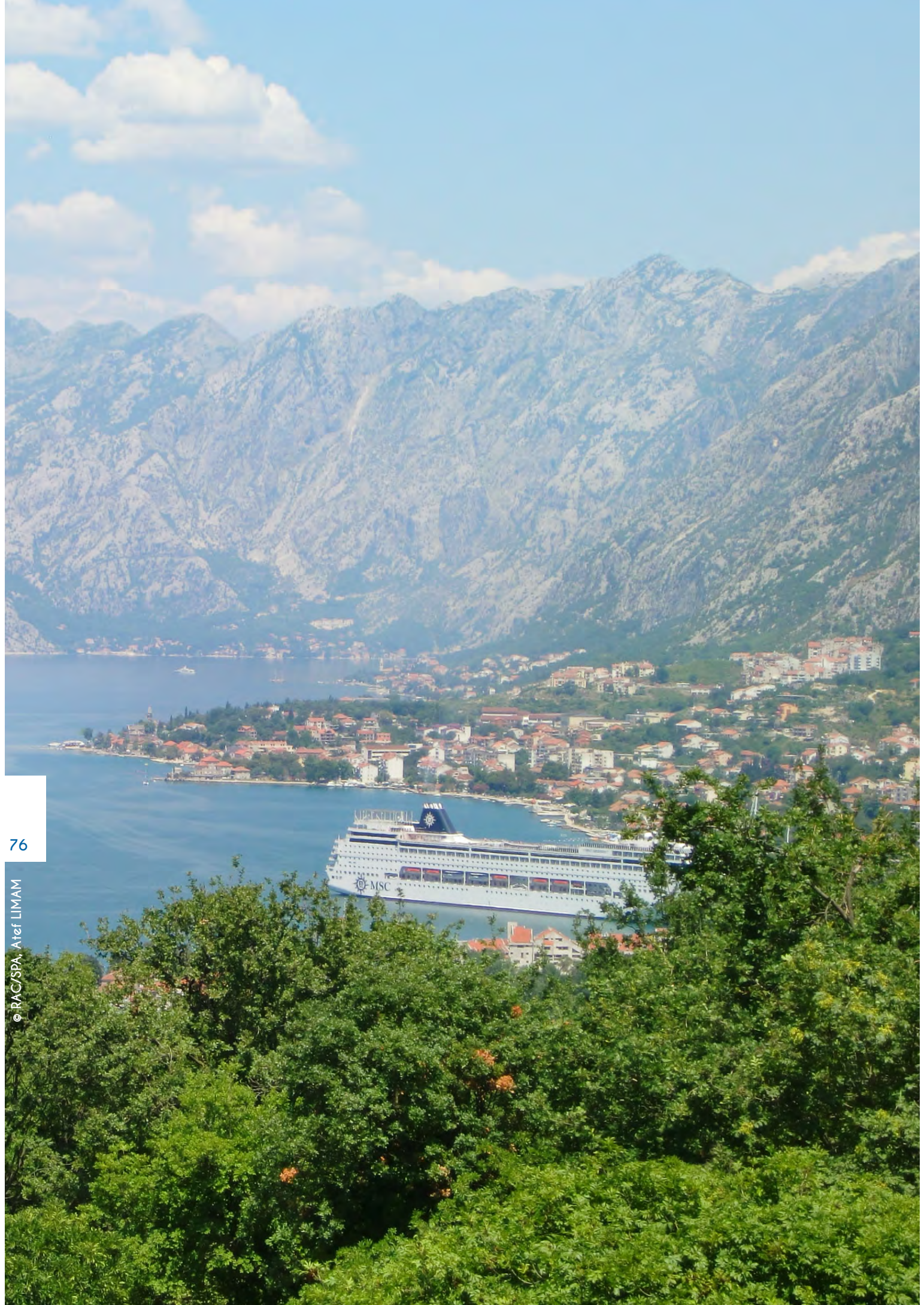
Having described the various stakeholders involved in ecotourism, the Table 37 summarises their main roles. Some of them are currently undertaken by the stakeholders, some others are potential roles yet to be developed.

Table 37. Role of the main stakeholders of ecotourism in Boka Kotorska

Stakeholders	Role
Private sector (travel agencies)	<ul style="list-style-type: none"> • Creating new ecotourism products. • Creating new jobs. • Demanding proper information on resources. • Providing information on their own activities. • Having direct contact with ecotourists (customers). • Identifying potential for business in ecotourism. • Identifying needs for entrepreneurs. • Build environmental and cultural awareness through information and education for customers. • Minimise the impact on the environment and provide benefits for conservation. • Support parks and protected areas, and avoid over-exploited destinations to develop lesser-known sites.
National government	<ul style="list-style-type: none"> • Laws and strategies creation. • Facilitation of proper conditions for ecotourism and exchange amongst stakeholders. • Capacity building. • Creating ecotourism strategies and campaigns at a National level. • Developing policies to protect and manage natural areas.
Local governments	<ul style="list-style-type: none"> • Coordinating actions in the municipalities and promote activities. • Providing administrative services. • Environmental protection through spatial planning. • Creating professional advice and practical training to entrepreneurs. • Mediation between individual stakeholders and other stakeholder groups (National government, etc.). • Offering services to eco-entrepreneurs (information, training, lobbying).
Educational institutions and research centres	<ul style="list-style-type: none"> • Knowledge support to all stakeholders in all academic fields. • Baseline information (inventories, compilations). • Bridging gaps between stakeholders. • Offering training and skills, more in a theoretical level.
Non-profit organisations	<ul style="list-style-type: none"> • Lobbying to promote nature. • Provide training, information and traditional knowledge to travel agencies. • Involvement and engagement of society with nature. • Contributing to ecotourism programs through research, best practices, stakeholder meetings, etc. • Promote new ecotourism initiatives in collaboration with the private sector.
International organisations	<ul style="list-style-type: none"> • Offering services, studies, funds (related to certain projects). • Entrepreneurship promotion. • Generating and facilitating networks. • Coordination with the National government to promote ecotourism policies. • Monitoring the development of these policies. • Facilitate and set the framework for the promotion of ecotourism.
Ecotourists	<ul style="list-style-type: none"> • Consuming ecotourism products and services by travel agencies and other ecotourism businesses in the region. • Providing feedback on the ecotourism offer in Boka Kotorska.

Source: Compiled by authors





4. DIAGNOSIS: IS ECOTOURISM FEASIBLE, VIABLE AND SUSTAINABLE IN BOKA KOTORSKA?

As we described in previous chapters, Boka Kotorska has a significant potential to become a new kind of destination focused on nature, culture, conservation and agriculture rather than just sun and sand. Large rural areas with small villages and churches provide the great opportunity for environmental enthusiasts to enjoy hiking through untouched environmental scenery. In addition, promoting culture and nature-based activities and services of ecotourism in Boka Kotorska can help promoting sustainable tourism, the creation of economic opportunities for local communities and above all, a balance between local development and sustainability.

Nevertheless, beyond the potential of assets and context, **could ecotourism be socio-culturally feasible, economically viable and environmentally sustainable in Boka Kotorska today and for the next future?** To answer that controversial question we need to highlight the strengths and opportunities as well as the weaknesses and threats of the implementation of this sector in Boka Kotorska and its area of influence.

Considering all the information gathered, we will focus the diagnosis of positive and negative aspects on **six main issues**: the conventional tourism; public tourism strategies, land planning and laws; natural resources with touristic attraction; infrastructures, buildings and services for ecotourism; ecotourism supply and complementary sectors; and stakeholder collaboration.

4.1. Conventional tourism sector in Boka Kotorska

Strengths & Opportunities

Boka Kotorska has the conditions to become a top Mediterranean destination all year round

Its good geographical position in the Mediterranean, close to major European capitals, its political stability, its good environmental conditions (pleasant Mediterranean climate and clean air due to the absence of industry in the area) and cultural values such as Boka Kotorska declaration as an UNESCO Heritage Site since 1979, local people hospitality, and its valued local and traditional food & products make of Boka Kotorska a very attractive destination in the Mediterranean.

Boka Kotorska presents a well-developed tourism sector

The destination offers diversified touristic activities and products (most important are culture, cruises, nautical activities and excursions) and some well-developed travel

infrastructure. Promotion of Boka Kotorska is present on every important event, fair, web pages, media, etc. in the region with a remarkable and constant flow of visitors, most of them throughout Kotor-Tivat gateways.

Mass tourism and foreign investments if reoriented can be an opportunity for ecotourism

Big tour operators may desire to offer ecotouristic products to their costumers (hotels and cruises). Ecotourism can be a good complement to the mainstream tourism -3S tourism (sand, sun, sea)- and in this way also contributes to the sustainability of these other forms of tourism. In addition, there is a growing sector of foreign direct investment which is seeking for opportunities. Ecotouristic high-standard facilities would be a desirable niche to explore.

The accession process of Montenegro in the EU may help reinforcing the EU market of tourists

Ongoing EU integrations with the objective of Montenegro being a new member state of the EU may help attracting tourists from the EU. It will also help standardising processes and improving standards of quality in tourism.

Weaknesses & Threats

Some deficits in the tourism infrastructure have been identified

Few airport direct connections to Tivat or Dubrovnik airport, insufficient hotel beds (especially in Herceg Novi), no proper waste water system, and irregular professional skills and foreign language proficiency may pose serious limitations to the development of a high-quality tourism in Boka Kotorska.

Massive touristic flux may pose environmental challenges to the region

The pronounced seasonality of tourism, with high traffic frequency (cruises) and overpopulation during the summer season leads to high amount of pollution in urban areas and a loss of attractiveness to the tourists. Marine tourism concentration may create new risks such as leakage from the marines (gas, flammable liquids, etc.). Finally, new resort developments and urban sprawl boosted from massive tourism in coastal areas may spoil a natural and cultural landscape with outstanding values.

External threats can determine the future of tourism in the region

Climate change impacts on natural and built environment, the evolution of transport costs and food prices due to the increasing cost of fuels, and the evolution

of competitor countries may compromise the development of tourism in Boka Kotorska in the mid-long term.

4.2. Public tourism strategies, land planning and laws

Strengths & Opportunities

Montenegro is the first declared Ecological State in Europe

Montenegro declared itself an Ecological State in 1991 and in 2007 issued a National Strategy of Sustainable Development, based on the principles and recommendations stated in the Rio Declaration and Agenda 21, as well as in the Declaration and Implementation Plan from Johannesburg. Ecotourism fits perfectly into these principles.

Montenegro has developed strategies for tourism development

In 2008, the Montenegro Ministry of Tourism and Environment issued the Montenegro Tourism Development Strategy to 2020. Although it does not actually use the term “ecotourism”, this Strategy identifies activities related to ecotourism, mainly focused for the coastal and mountain region of Montenegro and also promotes sustainable tourism. Boka Kotorska has its own tourism Master Plan, issued in 2003.

The CAMP project is an opportunity to boost ecotourism in Montenegro

To integrate ecotourism in the coastal area management of Boka Kotorska and at the same time control the unplanned urban growth should be one of the priorities of the CAMP project implementation. It should also be focused on preserving nature and promoting eco-entrepreneurship. The international scope may help mobilise funds to foster sustainable activities in the region. Ecotourism initiatives will find support from the green economy promotion deriving from the CAMP project.

Weaknesses & Threats

There is not an Integrated Coastal Zone Management implemented in the region yet

Despite some recent pilot projects by CAMP Montenegro, the coastal area of Montenegro has not yet ICZM as a unified and compact management system. On the contrary every coastal municipality is planning activities individually, and local, regional and national land planning have not been properly integrated and controlled.

There exists a risk of miss-planned management

Although there are relevant plans and strategies for the development of tourism in the region, there is the risk that these plans may not be followed properly by public authorities. A more strategic, long term and responsible planning is needed, to be applied rigorously.

Land planning and management sometimes prioritise short-term and private benefits instead of ensuring public interest and long-term scope

Public authorities may be moved to take decisions favouring private interests obeying a short-term logic, while public interest and a long-term and global vision is put in danger. This risk is aggravated by the financial and economic context of crisis.

There is a low level of citizen engagement and participation in public affairs

Probably due to its particular history, Montenegro has currently low levels of public participation and empowerment regarding public affairs, and most of the responsibility of managing public issues is transferred to the public authorities. However, some non-profit organisations achieve to engage citizens in their task.

4.3. Natural and cultural resources with touristic attraction

Strengths & Opportunities

Boka Kotorska has unique natural resources in the region

Boka Kotorska hosts a unique geomorphology (coast and mountains) and a remarkable biodiversity (flora, fauna). Though some of them are recognised and protected through the UNESCO protection area, National Parks and Natural monuments, action must be done to protect them from urban sprawl. Also in some areas, re-naturalisation is still possible. All these assets allow ecotourism projects to grow.

The key ecotouristic attractions to boost ecotourism in Boka Kotorska in the next years are the link of cultural heritage under UNESCO protection, with landscapes, flora and fauna particularly attractive in national parks (Lovćen and future Orjen) around Boka Kotorska. The area of Vrmac and Luštica and rural hinterland with Mediterranean rural landscapes (olive trees, vineyards, orange trees, etc.) are also significant resources. The sea floor and coastline is another important ecotourism attraction with unique species (e.g. gorgonian and yellow cluster anemone) as well as places and sites of high geomorphologic and hydrographical interest.

Boka Kotorska offers a good combination of sea and mountain attractions

A complementarity between coastal and hinterland attractions should be sought. Future Orjen Mountains National Park declaration offers a good opportunity for ecotourism in Boka Kotorska, through the development of mountain tourism background of Boka Kotorska, which would be added to the offer by the Lovćen National Park.

The rest of Montenegro also offer natural sites with ecotouristic interest

Ecotourism entrepreneurs in Boka Kotorska should consider a bigger area than Boka Kotorska itself, such as Skadar Lake or Durmitor mountains National Parks, as a complement to the ecotouristic offer of Boka Kotorska.

Ecotourism can contribute to reduce pressure to the coastal habitats and to recover values in the hinterland

Ecotourism activities in the hinterland (rural part of Boka Kotorska) may have a double beneficial effect: on the one hand, it can reduce the human pressure on some coastal habitats (preserving those more fragile), and on the other, by generating economic activity in the rural areas, it may contribute to its revitalisation and the conservation and improvement of its values, both from a natural and cultural point of view.

Weaknesses & Threats

Environmental pollution is a major threat to the region

Pollution of the natural environment upon the exploitation of its resources is one of the main impacts to the environment, especially solid waste production and waste water in urban areas.

Massive urbanisation provoke irreversible habitat loss in the region

Property speculation and soaring real estate prices, ongoing urbanisation projects in certain areas, new infrastructures and illegal construction provoke habitat loss that could jeopardise the conservation of very important ecotouristic assets. These projects are planned in the short term and have an evident impact on the land. Municipalities are contributing to this through liberal land-use planning, construction permits, etc. in order to increase economic activity in the depressed rural communities. These activities are not compatible with ecotourism, which needs time and investment in the long term, with a strategic view.

Insufficient management of protected areas

There are few economic resources available for the management of a large extension of land. Insufficient financial allocations from state budget and with no financial participation of private sector, this is causing biodiversity conservation activities (monitoring, scientific inventories and databases, management plans for protected areas of nature, etc.) being not implemented with required efficiency, or not implemented at all. National parks are increasingly forced to sell timber from their forests in order to meet financial needs. In some national parks, the pressure of increased tourism is threatening biodiversity.

There are lacks of knowledge and awareness regarding natural resources

Some of the natural resources of Boka Kotorska are yet to be discovered or studied. On the other hand, some of the available information is yet very scattered and there is not a global vision. That provokes a low level of awareness on the heritage in the region by local population.

The traditional rural settlements and communities are being lost

Migration of people from hinterland to coastal areas is provoking the loss of traditional landscapes and other rural assets. Entire villages (as Gornja Lastva in Vrmac) are abandoned and being lost at an alarming rate.

4.4. Infrastructures, buildings and services for ecotourism

Strengths & Opportunities

Montenegro has about 6,000 km of attractive routes thanks to the “Wilderness Hiking & Biking” project

The “Wilderness Hiking & Biking” project was initiated in 2007 and included in the national «Tourism Development Strategy to 2020». The “Top Trails” have already been marked and signposted, and the others shall follow step by step. One of the features of the project is the participation of a diversity of stakeholders in its development.

The Montenegrin coast transversal route offers an attractive infrastructure for hikers

Montenegro’s Mountaineering Association and several mountaineering clubs as well as non-governmental organisations have established the «Montenegrin Coast Transversal», aiming to expand coastal tourism’s reach into the still unexplored natural beauty of Montenegro’s southern hinterlands. The result is a 182 km transversal hiking trail with 150 km of access paths: winner of the Wild Beauty Award 2007 and one of nation’s “Top Trails”. The Transversal Route was inaugurated in 2006 and offers excellent opportunities for active tourists and ecotourists. It starts from the coastal mountains, from Orjen, through Lovćen, south to Rumija. Even a day-trip along this path lets the visitors enjoy breath-taking views.

Some best practices of facilities for wildlife watching to be promoted

In Lovćen National Park there are many sightseeing points and hides for wildlife watching complemented with telescopes for observation, some of them arranged recently. It could be also highlighted the Special Nature Reserve of Solila (Tivat salina) where ORNIBA project promoted trenches installed for bird watching along the edge of this area, and where other ecotouristic infrastructures are being planned.

Project of cable car Kotor-Lovćen-Cetinje can boost ecotourism in Lovćen Mountain National Park

The construction of the cable car Kotor-Lovćen-Cetinje is a project that would contribute to improve accessibility to Lovćen, and consequently a new opportunity to discover its natural and cultural richness, and to promote the construction of eco-villages to accommodate tourists from cruisers. Nevertheless, the risk of jeopardising some natural and landscape values advises to be extremely careful with environmental issues into this project. It is crucial to evaluate properly not only the threats of the infrastructure itself, but also the carrying capacity and new possible settlements.

Weaknesses & Threats

There is no technical and financial support for the development of infrastructures, buildings and services for ecotourism so far

Technical and financial support is needed to promote ecotouristic activities in Boka Kotorska. Public support is needed to boost private investment. Some preconditions should be present so individual investors would go into ecotourism.

One of the biggest infrastructure deficiency for ecotourism is felt in the interpretation signals

Signalisation such as educational paths, tables, visitors centres, signposts, etc. are often destroyed and damaged by vandals, not maintained properly and in general insufficient in volume and structure. Unfortunately, possibilities of internet technology to have a single data base and have access to information on specific location, QR code, and other means of communication are still not used. Sightseeing places (lookouts) exist, but due to poor environmental awareness, it is often used for disposal of waste and other materials. Observation towers are missing as well as other structure (marked paths, hiking club homes, etc.) and requires significant investments and high awareness of local population to maintain them.

4.5. Ecotourism supply/demand and complementary sectors

Strengths & Opportunities

There is a growing International market for ecotourism

According to the World Tourism Organisation (WTO), in 2020 ecotourism will be the tourist sector with the highest increase rate. It could mean around 30 % of world tourism activities. Beyond that, it is considered the fastest growing sector in the world's largest industry. Therefore, today's savvy travel consumers are demanding environmentally conscious and socially responsible options.

Northern Montenegro has already consolidated some ecotourism supply

Most of the ecotourist activities in Montenegro happen in the North, but some public support to entrepreneurs could help distribute the ecotouristic offer in the country for the benefit of both South and North ecotourism businesses, since they have a complementary offer.

Kotor could be a hub to connect different ecotouristic spots in Montenegro

A circular tour of 6-9 days around different ecotouristic hotspots in Montenegro could be promoted: Boka Kotorska, Skadar Lake, Durmitor, Biogradska Gora and Orjen mountains, even considering places in neighbouring countries (Bosnia-Herzegovina and Croatia).

Montenegro's diversity is an asset for the development of a strong ecotourism entrepreneurship

Not only natural values must be considered, but also other attractions and assets, such as agriculture products, cultural heritage, sports... that are widely distributed around the country. Ecotourism should take advantage of the diversity in Montenegro.

Weaknesses & Threats

There is a lack of promotion of ecotourism products

Ecotourism products in Boka Kotorska and Montenegro as a whole are not properly promoted and thus they are vastly unknown by general tourists. Even Eco-villages, which are a step forward in the development of ecotourism, are not putting wild nature and local culture into value as the main key resource and attraction to these areas. A map of ecotouristic activities in Montenegro could offer a good promotion material, and show how activities could be complemented amongst regions.

Complementary and specialized services, a necessary offer to be improved in Boka Kotorska

In order to improve the quality and specialization of the service it is necessary to raise the standard of local food, accommodation, local businesses, and reduce barriers to those entrepreneurs who are willing to initiate a new ecotourism business or to be a complementary and specialized offer to this sector.

Scarce available accommodation out of the summer season appropriate for ecotourists

Despite rare exceptions like several bungalows and children's accommodation facility in Lovćen National Park, there is a common lack of accommodation for ecotourists, operating all year round in close areas. In the Special Nature Reserve of Solila as far as accommodation is concerned, they exist, but it is in the city of Tivat, several km away from the area.

Private stakeholders on ecotourism do not have sufficient investment capacity

Ecotourism is promoted by small and medium enterprises, which have insufficient capacity to invest on ecotourism. These stakeholders fear the risk that an investment on ecotourism implies. The lack of entrepreneurship promotion by public bodies contributes to the difficulty of making the first step to ecotourism.

There are not ecotourism activities or services certified by any ecotourism or environmental friendly standard or certificate

Indeed, in the most cases tourism stakeholders and providers consider that current tourists in general did not look for eco-services.

4.6. Stakeholder collaboration

Strengths & Opportunities

Most of the stakeholders are ready for the promotion of ecotourism; they only need to do the first step forward.

It is not necessary to have a full consensus on ecotourism promotion, but an initial phase of development could be started as early as possible, especially through public investment.

Several NGOs are promoting and organizing ecotourism related activities such as hiking and biking.

There are several non-profit organisations involved in environmental preservation, protection of historic monuments, promotion of healthier life styles, etc. The aims of these organisations are compatible with ecotourism goals and most of these organisations show a good dose of entrepreneurship. Being Montenegro a small country, it can be concluded that NGOs may act as national marketing representatives of ecotourism in Montenegro.

Collaboration amongst stakeholders is on the epicentre of ecotourism promotion.

Ecotourists tend to look for a very specific offer so competence in ecotourism is not as present as in other tourism sectors. Collaboration amongst complementary companies will be very important to have a more complete offer. NGOs may play an important role if they get involved in Ecotourism by collaborating with promotion and knowledge sharing.

Most of the stakeholders in Boka Kotorska already know each other.

Boka Kotorska is relatively small regarding population numbers (about 67.500 people in the entire Bay) and most of the people know each other. That is a strength that may help boosting collaboration amongst the

main stakeholders, as there is a limited set of stakeholders and communication can flow faster. Of course, this may also be a weakness in case some personal conflicts may persist among stakeholders.

Weaknesses & Threats

There is a low culture of networking and cooperation between stakeholders

There is a lack of a coordinated management system providing an integrated touristic offer, and ecotourist services are promoted individually. There is also poor collaboration between agriculture and tourism sector.

No land stewardship initiatives have been identified in the region so far

Land stewardship is a strategy that involves landowners and users in the conservation of nature and landscape, with support and inputs from a wide range of civil society groups. Through voluntary agreements between land owners/users and land stewardship organisations, nature, biodiversity, ecological integrity and landscape values will be maintained and restored. Today, land stewardship is used in most continents of the world as a nature and biodiversity management and conservation tool. However, it is still not widely applied in the Boka Kotorska region.

Ecotourism is not fully understood by all stakeholders

Few stakeholders fully understand the concept and application of ecotourism and it is seen as a low added value activity. This has to do with a low environmental awareness in the society.

4.7. Diagnosis conclusions: feasibility and sustainability assessment

Feasibility assessment

To assess each of the ecotourism sector opportunities identified in section 4 a set of key issues were determined. The topics are outlined in the table below and have been applied to each of the strengths and opportunities versus the threats and weaknesses. The assessment shows that nowadays we find in Boka Kotorska both positive and negative pre-conditions to implement ecotourism. Despite the rich natural and cultural heritage and to be an appealing tourist destination, the fast degradation of landscape and natural resources and the abandonment of hinterland require a rapid and forceful response. Namely, scarce infrastructure to observe nature, limited skills of local entrepreneurs and low level of involvement and participation of stakeholders in networking among others, are some of the challenges to be faced for a successful future of the sector.

A description of feasibility by key issues is detailed in the Table 38:

Table 38. Feasibility assessment of Ecotourism in Boka Kotorska (BK)

KEY ISSUES FOR ECOTOURISM IMPLEMENTATION	FEASIBILITY ASSESSMENT: <i>Strengths & Opportunities vs Weaknesses & Threats</i>	
Conventional tourism	<ul style="list-style-type: none"> BK presents a well-developed tourism sector & the conditions to become a top Mediterranean destination all year round. Mass tourism and foreign investments if reoriented can be an opportunity for ecotourism. The accession process of Montenegro in the EU may help reinforcing the EU market of tourists. 	😊
	<ul style="list-style-type: none"> Some deficits in the tourism infrastructure have been identified. Massive touristic flux may pose environmental challenges to the region. External threats (climate change, competitors, cost of fuels, etc.) can determine the future of tourism in the region in the mid-long term. 	😞
Public tourism strategies, land planning and laws	<ul style="list-style-type: none"> Montenegro is the first declared Ecological State in Europe (1991). Montenegro has developed strategies for tourism development. The CAMP project (Integrated Coastal Zone Management) is an opportunity to boost ecotourism in Montenegro. 	😊
	<ul style="list-style-type: none"> There exists a risk of miss-planned management and lack of integration/coordination across different scales of planning. Land planning and management sometimes prioritise short-term and private benefits instead of ensuring public interest and long-term scope. There is a low level of citizen engagement and participation in public affairs. 	😞
Natural and cultural resources with touristic attraction	<ul style="list-style-type: none"> BK offers a good combination of sea and mountain attractions, jointly with the rest of Montenegro which also offer natural sites with ecotouristic attraction. The key ecotouristic attractions to boost ecotourism in BK are the link of cultural heritage under UNESCO protection, with landscapes, flora and fauna: protected areas, rural hinterland, and coastal/sea bed habitats. Ecotourism can contribute to reduce pressure to the coastal habitats and to recover values in the hinterland 	😊
	<ul style="list-style-type: none"> Environmental pollution and massive urbanisation is a major threat in the region and in some cases provoke irreversible habitat loss . Insufficient management of protected areas. There are lacks of knowledge and awareness regarding natural resources. Traditional rural settlements and communities are being lost. 	😞
Infrastructures, buildings and services for ecotourism	<ul style="list-style-type: none"> Montenegro has about 6,000 km of attractive routes thanks to the “Wilderness Hiking & Biking” project. There are several good examples of public facilities for wildlife watching to be promoted. Project of cable car Kotor-Lovćen-Cetinje can boost ecotourism in Lovćen Mountain National Park. 	😊
	<ul style="list-style-type: none"> There is no technical and financial support for the development of infrastructures, buildings and services for ecotourism so far. One of the biggest infrastructure deficiency for ecotourism are the interpretation signals. 	😞
Ecotourism supply/demand and complementary sectors	<ul style="list-style-type: none"> There is a growing International market for ecotourism. Northern Montenegro has already consolidated some ecotourism supply. Kotor could be a hub to connect different ecotouristic spots in Montenegro. Montenegro’s diversity is a key asset for the development of ecotourism entrepreneurship. 	😊
	<ul style="list-style-type: none"> There is a lack and misunderstanding of promotion of Ecotourism products. Complementary and specialized services, a necessary offer to be improved. Scarce available accommodation out of the summer season appropriate for ecotourists. Private stakeholders on ecotourism do not have sufficient investment capacity. 	😞
Stakeholder collaboration	<ul style="list-style-type: none"> Most stakeholders are ready for ecotourism, they only need to do the first step forward. Collaboration amongst stakeholders is on the epicentre of ecotourism promotion. Most of the stakeholders in Boka Kotorska already know each other. 	😊
	<ul style="list-style-type: none"> There is a low culture of networking and cooperation amongst stakeholders. No land stewardship initiatives have been identified in the region so far. Ecotourism is not fully understood by all stakeholders. 	😞

Sustainability assessment

To evaluate the sustainability (in a broad sense) of a brand new economic sector is a complex work. In order to consider all the dimensions of sustainability (environmental, economic and socio-cultural) we have determined the 4 main sustainability principles of ecotourism. Each of them is divided in 3 levels (high, medium, low) that synthesize 3 degrees of sustainability. So, the assessment highlights the degree of sustainability for the principles, in current situation (today assessment) and for the next future in 2 scenarios (trends business-as-usual, and trends with ecotourism strategy). The purpose of this assessment is merely to have a qualitative vision of the challenges to be faced for the

sustainability of ecotourism when implementing the sector.

Generally speaking, sustainability of ecotourism is possible and desirable because it refers to a sector that tends to avoid seasonality, with high growth tendency especially as a tool for differentiation and destination positioning on the international market. In addition, it is highly important for business and entrepreneurship development in local community, particularly in rural areas, where development options are limited in comparison to the urban agglomerations.

Table 39 shows the degree of sustainability of ecotourism today and for the next future.

Table 39. Sustainability assessment of ecotourism in Boka Kotorska: current assessment; trends Business-as-Usual; and trends with an adequate ecotourism strategy.

Sustainability principle	Degree of sustainability of ecotourism		Current situation	Trends Business-as-Usual	Trends with ecotourism strategy
Contributes to preserve natural and cultural diversity	High	Generation of economic resources directly reinvested in conservation actions of the natural area visited by ecotourists.			😊
	Medium	Contribution to conservation through several public strategies, NGO projects and research activities.	😐		
	Low	Low contribution to preserve natural and cultural diversity, more passive and indirect based only on some public policies and few stakeholders interested.		😞	
Contributes to improve economy and quality of life of local population and promotes the participation of small businesses and local entrepreneurs	High	Local businesses and entrepreneurs lead sector. It boosts other related local services (accommodation, restaurants, local food production, etc.) all year round.			😊
	Medium	Contracting services offered by foreign companies, but the execution of activities is performed partially by local ones. Moreover, the activity has little potential to generate economic activity through related services (peak season).	😐		
	Low	Sector is led by foreign companies, and all the complementary services are also controlled by foreign companies (extreme seasonality).		😞	
Minimising negative impacts on natural environment	High	Avoid mass activities. Preparation and development of the activities/services includes several measures to minimise environmental impact.			😊
	Medium	Activities can be massive in peak seasons. Preparation and development of the activities/services includes some environmental measures but are not sufficient.			
	Low	Activities are usually in big groups and generate agglomerations. Scarce measures to reduce environmental impact.	😞	😞	
Incorporates raising awareness and environmental education activities	High	Highly skilled professional guides that convey values and challenges of natural conservation. Ecotourists also receive high quality information (guides, brochures, etc.). Sometimes they also participate in conservation or research activities.			😊
	Medium	Ecotourists can be informed by some signposts on the field. If they are not, they can be informed with some general information about natural and cultural values and their challenges.	😐	😐	
	Low	Ecotourists do not receive any information or explanation about the values and challenges of the area. The only input about the context is the experience of the visit.			

In conclusion, Boka Kotorska has extraordinary heritage values, both natural and cultural, enough to attract ecotourists from around the world. It also has the basic tourism infrastructure (though it could improve when it comes to accommodation facilities and specific ecotouristic facilities). But we are afraid that this is hardly enough to make ecotourism feasible as an economic activity in the region.

Some further conditions should be set before ecotourism could experience a real boost in the region, such as political will, training, public awareness, stakeholders networking and private entrepreneurship. Action should be taken following a general ecotourism strategy for Boka Kotorska and Montenegro, some insights of which is presented in the next chapter.



5. RECOMMENDATIONS FOR FUTURE DEVELOPMENT OF ECOTOURISM IN BOKA KOTORSKA

Development of ecotourism in Boka Kotorska can contribute to the preservation of natural and cultural diversity and the minimisation of negative impacts on an invaluable heritage that has been brought to today generation after generation. Moreover, it can generate new incomes, reduce unemployment and improve Montenegrin tourism offer, and finally yet importantly, it can mean a step forward in the national population's environmental awareness. Ecotourism can help achieving the delicate balance between economic activity and nature conservation

thus contributing to the desired general sustainability of the coastal area of Montenegro.

As stated in the diagnosis chapter, Boka Kotorska presents huge potential for ecotourism, but some conditions should be set before ecotourism could experience a real boost. Action should be taken following a general ecotourism strategy and action plan for Boka Kotorska and Montenegro. The following chapter draws some rough lines of how this ecotourism strategy should be oriented, structured in six main strategies, as presented.

Table 40. Strategies for ecotourism in Boka Kotorska contribution to the sustainability principles of ecotourism

	Natural and cultural diversity preservation	Improvement of economy and quality of life	Minimisation of negative impacts	Awareness raising and environmental education
Multiscale & Multisectoral strategy, planning & laws related to ecotourism	☺ ☺ ☺	☺	☺ ☺	
Sound management of natural and cultural assets	☺ ☺	☺	☺ ☺	
Support to ecotourism entrepreneurship		☺ ☺ ☺		☺
Capacity Building for ecotourism initiatives		☺ ☺	☺ ☺	☺
Networking amongst stakeholders	☺ ☺	☺ ☺	☺	☺ ☺ ☺
Promotion of ecotourism products		☺ ☺	☺	☺ ☺ ☺

Note: the number of "smileys" indicates the intensity in which each strategy contributes to the sustainable principles of ecotourism

For each strategy, a set of recommendations is proposed. Some of them are short- and mid-term recommendations (meaning that they should be enforced during the next 1-3 years) and some others are expressed as long-term recommendations, to be executed after some other actions have been already put into practice. For example, “Organising debate meetings and workshops related to ecotourism [...]” is a short-term recommendation that if is consolidated can bring up to the creation an “ecotourism umbrella association [...]”, which is a long-term recommendation.

Most of the following recommendations arise from the diagnosis presented in chapter 4, and have been checked

during the participatory process, namely the workshop, the surveys and interviews to stakeholders.

Table 41 summarises the main characteristics that any ecotourism destination should have according to UNEP & The International Ecotourism Society (TIES). The table helps visualising a desired scenario in which Boka Kotorska has become a true ecotourism destination in the region. The strategies and recommendations presented in this chapter should in some way or another contribute to Boka Kotorska reaching this desired scenario.

Table 41. Characteristics of an ecotourism destination.

Characteristics
<ul style="list-style-type: none"> • Natural features conserved within a protected landscape. • Low-density development, where natural areas are abundant and the built landscape does not dominate. • Evidence that tourism is not harming natural systems such water. • Thriving small community businesses, including food stands and other types of craft enterprises owned by local people. • Plenty of designated outdoor recreation zones that are designed to protect fragile resources, including bike paths, trails or boardwalks that are shared by locals and visitors alike. • Thriving, locally owned lodges, hotels, restaurants and businesses that provide genuine hospitality with friendly, motivated staff. • A variety of local festivals and events that demonstrate an on-going sense of pride in the local community’s natural environment and cultural heritage. • Friendly interaction between local people and visitors in natural meeting places, such as local shops or benches by the sea.

Source: Epler, M. (2002). Ecotourism: principles, practices & policies for sustainability. UNEP & The International Ecotourism Society.

UNEP and TIES also provide some basic management guidelines for the development of ecotourism destinations. These

guidelines inspire the recommendations presented in this chapter, which are adapted to the reality in Boka Kotorska (Table 42).

Table 42. Management guidelines for an ecotourism destination.

Management guidelines
<ul style="list-style-type: none"> • Provide adequate budgets to conserve popular tourist areas, and earmark tourism fees for conservation. • Tourism businesses should pay impact fees that fund infrastructure for solid waste treatment, sewage treatment capacity, electricity and water, because their guests will require these services. Tourism properties should receive clear incentives for conserving electricity and water. • Environmental impact assessment programs should be followed by impact monitoring programs. These programs should be tied to business licensing and certification systems. • Well-managed trails and camping areas should provide clearly marked rules for low-impact use. • Published and recognized rules and regulations for public lands should detail the type of vehicles permitted in specific zones, speed limits, fines for dumping or pollution, clear rules for limiting off-road driving, oversight on the number of visitors allowed in zoned areas, and instructions on how and when to observe wildlife. Guidelines should state what is inappropriate. • Training programs are necessary to provide local inhabitants with the opportunity to run their own businesses. • Affordable housing programs should ensure that local residents are not excluded from their own communities due to ballooning real estate prices.

Source: Epler, M. (2002). Ecotourism: principles, practices & policies for sustainability. UNEP & The International Ecotourism Society.

5.1. Multiscale & multisectoral strategy, planning & laws related to ecotourism

The planning and management of Boka Kotorska as a destination will determine how well ecotourism can thrive there. However, as we have explained in the diagnosis, it is still extremely rare to see integrated regional tourism planning and management, not to mention strategies that highlight ecological and social considerations. New plans and laws should have a multiscale vision, trying to engage municipalities and national institutions. A multisectoral vision and an integrated natural resource planning is also necessary to offer residents a variety of sustainable economic development alternatives beyond ecotourism.

Once clear planning for ecotourism takes place, it is much more plausible that individual businesses can succeed at their goals of offering environmentally sensitive tours and lodging that provide benefits local communities. Moreover, the development of and ecotourism planning process should be followed by proper legislation (Strategy of Tourism, Law on National Parks and Law on Environmental Protection) to encourage new ecotourism initiatives. Management is also required at the destination to ensure the long-term harmony of tours and lodges with the people and environment on the region. The effective implementation of the tourism plans and nature protection laws is necessary, through the enforcement of plans, municipality control and amending legislation system. So, incorporating Strategic Environmental Assessment (SEA) when planning could be an effective methodology to ensure that environmental and possibly other sustainability aspects are considered effectively in policy, plan and programme making related to ecotourism.

The following recommendations may be useful for all types of organisations and institutions to achieve a multiscale & multisectoral strategy related to ecotourism in Boka Kotorska.

Short- and mid-term recommendations (1-3 years)

- Developing and applying a Strategic Action Plan of Ecotourism in Boka Kotorska or, from a wider point of view, a Strategic Action Plan of Sustainable Tourism, in accordance to (and updating if necessary) the Montenegro Tourism Development Strategy to 2020. This new plan should depend on baseline data of social and environmental factors, zoning strategies, regulations that can prevent deliberate abuse of fragile ecosystems, local participation in developing a set of standards for limits of acceptable change, and long-term monitoring.
- Implementing CAMP Montenegro and therefore consolidating ICZM as a unified and compact management system and management structure.
- Incorporating Strategic Environmental Assessment (SEA) with a cross-sectoral perspective in policy, plan and programme making, particularly in those new public instruments in topics related to ecotourism

(land use, urbanisation, landscape, tourism, local and rural development, etc.)

- Controlling urban sprawl by preventing new construction sites, especially in the coastal area and in sensitive spots.
- Promoting public participation (information gathering, consultation) in the elaboration of new strategies and plans, through information technologies.

Long-term recommendations (>3 years)

- Developing rural policies and strategies to recover rural areas and villages and reduce pressure on the coastal region.
- Creating a properly managed eco-tax to promote ecotourism and sustainable tourism and to guarantee that ecotourism contributes directly to the conservation of protected areas.
- Promoting the use of sustainable means of transport, especially bicycles and collective transport (buses, taxis, car sharing...)
- Developing infrastructures such as new roads, water supply and sewage systems, energy, waste disposal, according to the needs of every location and prioritising the minimisation of environmental impacts.
- Supporting local products promotion, especially traditional ones (olive oil, wine, seafood).
- Creating specific regulations to offer legal basis for the eco-tourism service providers.

5.2. Sound management of natural and cultural assets

The conservation and good management of natural and cultural resources are key factors when an appropriate development of ecotourism must be guaranteed, since anywhere in the world and in Boka Kotorska, many negative effects have been documented about the practice of tourism in natural areas. As a result, we need to dedicate all the necessary resources and tools to avoid the degradation of our natural and cultural heritage and to guarantee that ecotourism contributes to their preservation. The diversity and fragility of habitats located all around the bay and the surrounding natural areas would constrain present and future practices and uses related to tourism activities, urban developments, forest management and fishing practices among others.

The following recommendations may be useful for all types of organisations and institutions to achieve sound management of natural and cultural assets in Boka Kotorska.

Short- and mid-term recommendations (1-3 years)

- Increasing economic resources available for the management of protected areas.
- Creating and financing stable management structures in Solila salt marsh and in new Orjen National Park, encouraging private engagement.

- Enforcing severe sanctions to the violation of laws and rules regarding nature and heritage conservation.
- Increasing knowledge and research on the natural and cultural values in the region through new monitoring programs.
- Evaluating properly the threats for natural and landscape values of all future investments and tourism projects in Boka Kotorska as a whole and from a strategic view.
- Evaluating properly the threats of the cable car between Kotor and Cetinje, and also the carrying capacity and new possible settlements.
- Regulating and limiting the access of cruise ships entering at the bay, especially in high season.
- Regulating access and frequency of visitors to certain vulnerable areas, according to scientific carrying capacity assessments.

Long-term recommendations (>3 years)

- Creating new protected areas in vulnerable regions such as Mount Vrmac or Luštica peninsula.
- Setting mechanisms that will be useful to guarantee that ecotourism contributes directly to the conservation of protected areas.
- Introducing the concept and promoting land stewardship within environmental programs and regulations, in order to engage landowners in the conservation of natural and cultural heritage.
- Considering biodiversity conservation and land stewardship as an approach that can help local businesses deliver or implement Corporate Eco Social Responsibility objectives.

5.3. Support to ecotourism entrepreneurship

If ecotourism roots and grows as an economic sector in Boka Kotorska, it will eventually generate many companies which will employ local people, and generate higher incomes and better standard of living. However, ecotourism is based on micro, small- and medium-sized enterprises, and given the current circumstances, some investors will wait others to do the first step and follow their tracks. This is why it is crucial to help pioneers to explore the ecotourism market. The support needs to be aligned with the specific needs in the tourism sector and the existing preconditions in the region.

The following recommendations may be useful for all types of organisations and institutions to boost ecotourism entrepreneurship in Boka Kotorska.

Short- and mid-term recommendations (1-3 years)

- Creating a database of entrepreneurs and ecotourism activities to better monitor ecotourism development and to offer best solutions to their needs.

- Creating a “help desk” to offer free of charge support to entrepreneurs and start-up enterprises related to ecotourism.
- Providing fiscal and legal support to ecotourism start-ups as part of a green economy strategy.
- Enhancing new public and private investments on ecotourism facilities and infrastructure to provide a basis for new ecotourism activities and products (e.g. creating a network of shelters and hides for wildlife observation).

Long-term recommendations (>3 years)

- Establishing mechanisms of institutional support to innovation in the tourism sector through grants, prizes and awards to innovation.
- Creating an ecotourism business incubator, offering financial support, fund raising, assessment and support by the National and Local governments and universities.

5.4. Capacity Building for ecotourism initiatives

Be it a start-up or a consolidated business, any enterprise needs updated training and education to ensure best practices in the field. Being ecotourism an innovative sector, capacity building is even more necessary. Universities and research centres should have a significant role in capacity building by providing applicative educational programmes with entrepreneurial component. In addition, programmes and materials are needed for the purposes of self-education and experience exchange.

The following recommendations may be useful for all types of organisations and institutions to provide capacity building for ecotourism initiatives in Boka Kotorska.

Short- and mid-term recommendations (1-3 years)

- Developing specialised training workshops in environmental, business and language skills in order to increase private sector capacity and to ensure the quality of ecotourism products.
- Establishing mechanisms to share methodologies amongst ecotourism initiatives, based on trust and cooperation.
- Promoting international benchmarking on ecotourism and exchange programs.
- Creating training programs for tour guides in the rural areas to include the ecotourism approach into their services.

Long-term recommendations (>3 years)

- Integrating ecotourism in the tourism education and university offer.
- Developing specific University professional programs on ecotourism (masters or training courses).

- Elaborating online databases of available information and resources on environmental, social and economic issues, open to all stakeholders.
- Organising an expert group to monitor ecotourism activities and assess its quality.
- Promoting informative campaigns to explain ecotourism as a new line of business to the private agents that carry out tourist activities in Boka Kotorska.

5.5. Networking amongst stakeholders

In order to successfully promote and develop ecotourism, a good communication and cooperation will be required among all of the agents. Involving as many primary stakeholders as possible, including the local community, tourism industry members, and government in the development and implementation of tourism planning, greatly increases the chances of long-term success. In order to ensure adequate stakeholder representation, it will be crucial to involve a broad selection of target stakeholders. Networking and collaboration are based on good communication, flexibility, independence and trust amongst stakeholders, and time is needed to build strong alliances.

The following recommendations may be useful for all types of organisations and institutions to achieve networking amongst stakeholders in Boka Kotorska.

Short- and mid-term recommendations (1-3 years)

- Promoting public/private partnerships and private networking and sharing of knowledge and information.
- Consolidating a database of ecotourism stakeholders, based on the sociogram included in this feasibility study.
- Organising debate meetings and workshops related to ecotourism in order to set stronger connection between all stakeholders
- Offering public support to the NGO sector in the promotion and execution of ecotourism activities.
- Inviting big tour operators and investment companies to invest and cooperate with the ecotourism sector in Boka Kotorska.

Long-term recommendations (>3 years)

- Creating an ecotourism umbrella association (network) to put in contact all stakeholders, offer specialised services and have impact to decision makers at the local and national level.

5.6. Promotion of ecotourism products

Ecotourism market in Montenegro is very small in comparison with the similar markets of the neighbouring countries. Ecotourism products in Boka Kotorska and Montenegro as a whole are not properly promoted and thus they are vastly unknown by ecotourists from all over

the world. Even Eco-villages, which are a step forward in the development of ecotourism, are not putting wild nature and local culture into value as the main key resource and attraction to these areas. Therefore, this poor market position in terms of competition should be improved. Attracting the right ecotourists is a long process, where it is necessary to establish appropriate tourism country offer. There are several markets that appear as interesting (Western Europe, the USA and remote destinations such as Japan), but any serious activity requires detailed market and consumer profile research.

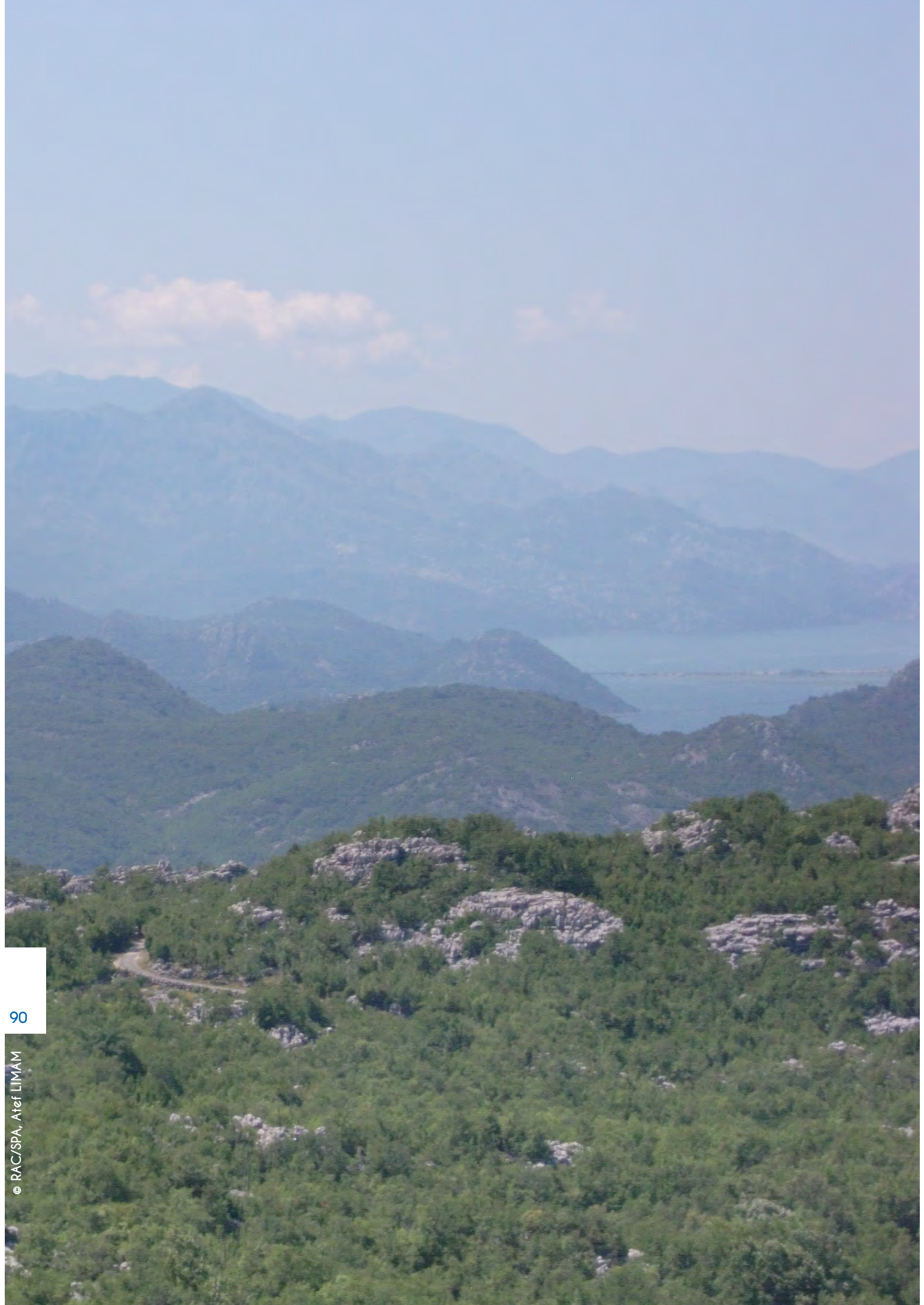
The following recommendations may be useful for all types of organisations and institutions to achieve promotion of ecotourism products in Boka Kotorska.

Short- and mid-term recommendations (1-3 years)

- Establishing mechanisms of institutional support to local companies and administrations in Boka Kotorska to promote ecotouristic activities and products.
- Integrating in all ecotouristic promotional actions and products other values as cultural heritage, spiritual values and local food production.
- Creating specific campaigns to recruit ecotourists from existing tourist centres and sources of demand (marinas, resorts, historical cities, etc.), which imply more close cooperation with other types of tourism such as beach, nautical, MICE and medical tourism.
- Publishing and specific brochure and map with ecotourism products and main ecotouristic attractions in Boka Kotorska, which should be available in national and local tourism websites and tourist offices.
- Increasing the effort and resources dedicated to environmental education for the local population through new campaigns and integrating environmental protection in school activities.
- Promoting the use of sustainable tourism labels by the private sector in Boka Kotorska, with special attention to the EU ECOLABEL standard and the European Charter of sustainable tourism.

Long-term recommendations (>3 years)

- Engaging National Tourism Organisation of Montenegro and local tourism organisations (TO Kotor, TO Herceg Novi, TO Tivat) to cooperate and promote Boka Kotorska and Montenegro as an ecotourism destination. Ecotourism should be promoted as part of a responsible and sustainable tourism offer. A marketing plan of ecotourism in Montenegro could be developed and implemented.
- Carrying out a large-scale campaign with local and national media to let people know ecotourism and its associated benefits.
- Undertaking necessary steps to obtain the Europarc European Charter for Sustainable Tourism in Lovćen National Park.



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www.camp.mrt.gov.me

European Ecotourism Network, EEN (Network of organisations aiming to ensure that ecotourism services in Europe contribute to a genuine conservation and sustainability effort).
www.ecotourism-network.eu

IUCN – Tourism and biodiversity
www.iucn.org/about/work/programmes/business/bbp_work/by_sector/tourism

Montenegro National Parks
www.nparkovi.me

National Tourism Organization of Montenegro
www.montenegro.travel

Priority Actions Programme/Regional Activity Centre, PAP/RAC
www.pap-thecoastcentre.org

Regional Activity Centre for Specially Protected Areas, RAC/SPA
<http://rac-spa.org/>

Regional Activity Centre for Sustainable Consumption and Production, SCP/RAC
www.cprac.org

Statistical Office of Montenegro, Monstat
www.monstat.org

The European Charter for Sustainable Tourism in Protected Areas
www.european-charter.org

The International Ecotourism Society
www.ecotourism.org

The Mediterranean Experience of Ecotourism, MEET (EU Project to improve the sustainability and the rationalization in distribution of the tourism sector in the Mediterranean region).
www.medecotourism.org

UNWTO – Ecotourism and protected areas
<http://sdt.unwto.org/en/content/ecotourism-and-protected-areas>

UNWTO – Sustainable development of tourism
<http://sdt.unwto.org>



7. ANNEXES

WORKSHOP PROCEEDINGS WORKSHOP ON ECOTOURISM AS AN OPPORTUNITY FOR SUSTAINABLE DEVELOPMENT IN BOKA KOTORSKA

Kotor, 30th of Jan – 1st of Feb. 2014

Credits

General Coordination

Francesca CULCASI, SCP/RAC

Workshop organisation

Francesca CULCASI, SCP/RAC

Meryem CHERIF, SCP/RAC

Xavier SABATÉ, Espai TReS · Territori i Responsabilitat Social

Xavier CAZORLA, eleMents

Ana FILIPOVIC, CEED

Workshop proceedings

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Xavier CAZORLA, eleMents

FOREWORD

The present workshop report has been elaborated within the framework of the Regional Project for the Development of a Mediterranean Marine and Coastal Protected Areas (MPAs) Network through the boosting of MPAs Creation and Management “MedMPAnet Project”, which is part of the MedPartnership GEF full size project “Strategic Partnership for the Mediterranean Sea Large Ecosystem” led by UNEP. The MedMPAnet Project is implemented by the Regional Activity Centre for Specially Protected Areas (UNEP/MAP-RAC/SPA) with financial support of the European Commission

(EC), the Spanish Agency for International Cooperation to Development (AECID) and the French Global Environment Facility (FFEM).

The activity has been undertaken in the context of a joint collaboration between RAC/SPA and The Regional Activity Centre for Sustainable Consumption and Production (SCP/RAC) aiming at assisting Montenegro in implementing ecotourism in Boka Kotorska in order to enable integrated coastal zone management (IZCM) of the coastal area of Montenegro.

ANNEX 1: WORKSHOP PROCEEDINGS

1. Introduction

From 30th January to 1st February 2014, Kotor hosted an international workshop where academic and professional debates took place to define the critical issues to promote ecotourism as a strategy for local development in Boka Kotorska (Montenegro).

Boka Kotorska (Bay of Kotor) is one of the most renowned stretches of the Montenegrin coast, part of which has been designated as UNESCO's World Heritage Site. Concentration of different activities in this part of the coast is very high, and pollution problems (due to communal wastewater, maritime activities and industry) are exacerbated by the enclosed nature of the Bay. The area also hosts a rich biodiversity, expressed in a huge variety of landscapes, from the bay itself to the mountains that surround it. Ecotourism, understood as an environmentally responsible travel to natural areas, may present an opportunity for the sustainable management of this fragile ecosystem, which must be properly analysed to foster action to its development.

In the framework of Coastal Area of Montenegro (CAMP Montenegro) a three day Workshop was held in Boka Kotorska on Ecotourism aimed to explore the opportunities for sustainable development of the highly vulnerable micro region of Boka Kotorska Bay while achieving its good environmental status. UNEP/MAP regional activity centers SCP/RAC, RAC/SPA, PAP/RAC and MEDPOL programme, in cooperation with Ministry for Sustainable Development and Tourism of Montenegro, organized this

event in order to contribute in creating National Strategy for Integrated Coastal Zone Management of Montenegro.

2. Aims and target groups of the Workshop

The workshop was aimed at the main stakeholders of the ecotourism sector in Boka Kotorska: local eco-entrepreneurs, travel agencies, public authorities, NGOs, university centres and international bodies. All actively participated providing the workshop with vast amount of information, knowledge on ecotourism and good practices for both the entrepreneurship and country level practice in this field.

The aim of the workshop was to share best practices, obtain a SWOT analysis and define actions and strategies to boost ecotourism. The workshop was also developed in such a way as to provide methodology to undertake a project of entrepreneurship on the ecotourism sector, and illustrate it by applying practical examples, which in line helped encourage networking and interaction among participants.

In particular, these were the detailed objectives:

- To serve as a diagnosis and involvement tool of the main stakeholders with the feasibility study on the ecotourism sector in Boka Kotorska;
- To provide a methodology to undertake a project of entrepreneurship on the ecotourism sector, and illustrate it by applying to a practical example: to identify lines of action for the promotion of ecotourism in the region;

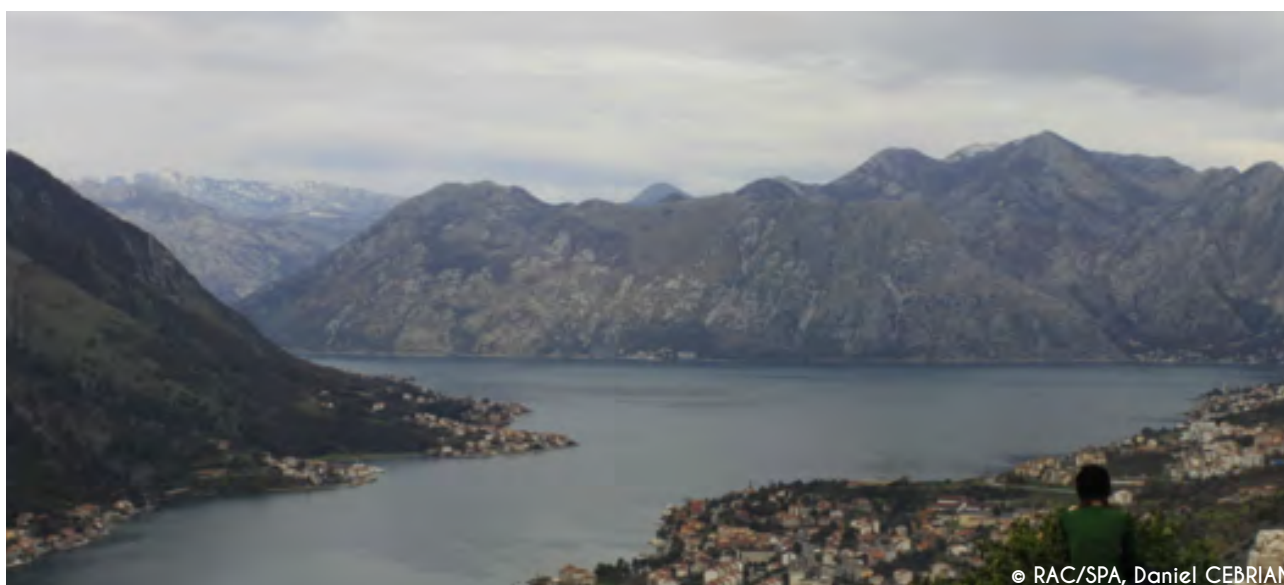


Figure 1. A view of the Boka Kotorska from the Castle of St John, Kotor

- To inspire participants through case studies of successful local and international ecotourism, and, if possible, the development of the workshop in a natural environment (Kotor's countryside for example);
- To encourage networking and interaction among participants, in order to build lasting relationships for both the contribution to the feasibility study and to boost the sector in general.

	Thursday 30 th – Jan (Workshop)	Friday 31 st – Jan (Workshop)	Saturday 1 st – Feb (Stakeholders Day)
AM	Institutional presentation Theoretical introduction	Working Groups Session: diagnosis	Working Groups Session: entrepreneurial projects
PM	Description of Kotor's and international case Case studies	Working Groups Session: critical issues and stakeholder identification	Project presentation Multistakeholders Round Table Closing session

3. Day one: Introducing the concept of ecotourism and SWOT analysis

During the first day the presentation of the workshop took place, with a small exercise facilitated by Xavier Sabaté (Espai TReS) about the expectations of the participants. During that exercise most of the participants agreed that one of the main expectation was to bring the results of the workshop into action.

Afterwards, some framework presentations were carried out by international experts in the field of ecotourism, green economy, marine and coastal ecosystems and pollution reduction. Presentations focused on greening economy in Boka Kotorska, pollution reduction as a precondition for greening economy, development of the master plan for green and blue economy in Boka

The workshop took place in Hotel Cattaro and the Town Hall of Kotor, and was delivered in English.

The following table summarizes the schedule of the workshop. See annex 2 and 3 for a more detailed schedule and contents, and a description of all lecturers.

Kotorska, with lectures by Jelena Knezevic, CAMP Montenegro National Coordinator, Ivica Trumbic, MEDPOL expert, Ilija Moric, professor at the University of Montenegro, Vesna Lekovic, member of the NGO Expeditio, and Chiara Farinea, from the consultancy d'Appolonia. Finally, Xavier Cazorla (Elements) as international expert presented the basics of ecotourism.

3.1. SWOT analysis of ecotourism in Boka Kotorska

The presentations of the morning led to a participative debate on the main strengths, weaknesses, opportunities and strengths (SWOT analysis) of ecotourism in Boka Kotorska. The main results of this debate can be summarised in the following table:

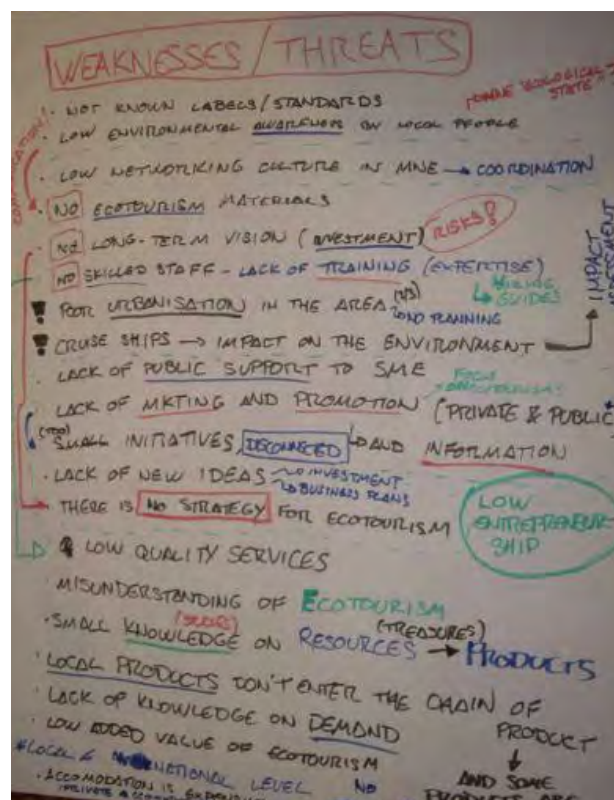
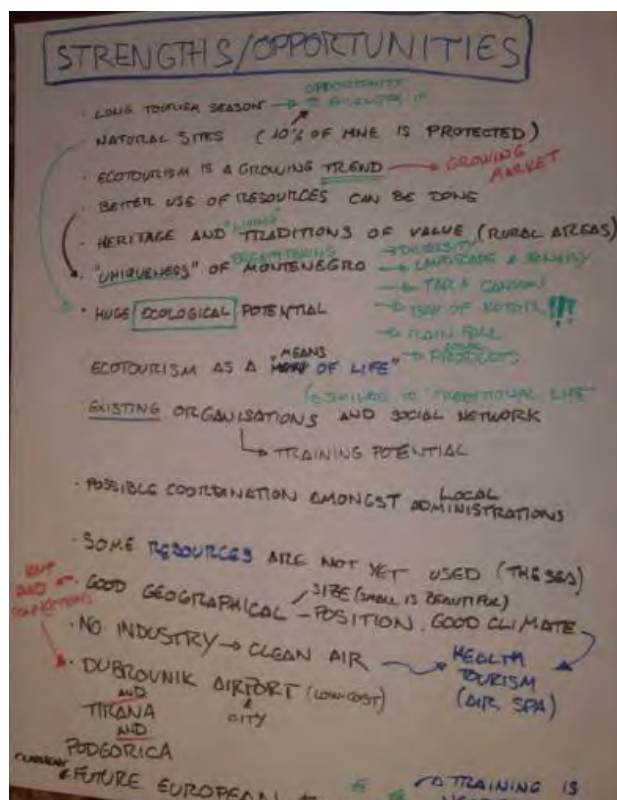


Figure 2. Results of the participative debate on the main strengths, weaknesses, opportunities and strengths (SWOT analysis) of ecotourism in Boka Kotorska

<u>Strengths</u>	<u>Weaknesses</u>
<ul style="list-style-type: none"> - Boka Kotorska as an UNESCO Heritage Site - Unique geomorphology (coast and mountains) - Remarkable biodiversity (flora, fauna) - Pleasant climate - Good geographical position in the Mediterranean. - Well-developed tourism sector - Local and traditional food & products - Important natural monuments, protected areas - Several NGOs involved in Ecotourism - Diversified touristic activities & products - Montenegro has self-claimed as the first “ecological country” in Europe. 10 % of its surface is protected. - Good environmental conditions (clean air) due to the absence of industry in the area 	<ul style="list-style-type: none"> - Lack of a coordinated management system providing an integrated touristic offer - Few airport direct connections to Tivat airport - Lack of promotion of Ecotourism products - Low environmental awareness in the society - SME have insufficient capacity on Ecotourism - Irregular language proficiency - No proper waste water system - Tourism seasonality - Insufficient hotel beds (specially Herceg Novi) - Ecotourist services promoted individually - Low culture of networking and cooperation between stakeholders
<u>Opportunities</u>	<u>Threats</u>
<ul style="list-style-type: none"> - Growing International market for ecotourism - Tourism Development Strategy to 2020 - Montenegro accession to EU process (European Funds) - Land stewardship as a growing trend for nature management in Europe - Cruise tourism (new customers) - National and international projects focused on preserving nature and promoting eco-entrepreneurship (ecotourism) 	<ul style="list-style-type: none"> - Massive touristic flux (Eco principles at risk) - Environmental pollution, especially solid waste production and waste water - Devastation of environment: illegal construction, urban sprawl, infrastructures, etc. - Foreign investors often do not prioritize local community’s needs - Risk of miss-planned management - Migration of people from hinterland to coastal areas - Ecotourism is not fully understood by all stakeholders: low added value

4. Day two: Identifying ecotourism stakeholders and their role

The second day was devoted to discuss the key issues to develop ecotourism in Boka Kotorska. Meryem Cherif, from SCP/RAC, and Daniel Cebrian, from RAC/SPA, opened the session, during which several ecotourism case studies were presented. So, it was presented an overview about how to implement the European Charter for Sustainable Tourism in natural protected areas (ECTS), or different international examples and approaches to ecotourism activities

in Mediterranean and mountain areas (Xavier CAzorla, Elements). It was also introduced the participative strategy of land stewardship, presented by Xavier Sabaté (Espai TReS).

4.1. Key issues for ecotourism promotion in Boka Kotorska

The debate on the SWOT analysis during the previous day led to the identification of the key issues for ecotourism promotion in Boka Kotorska, and a preliminary proposal of actions that could be derived from these key issues.

Key issues for ecotourism promotion in Boka Kotorska
The need for strategy, planning and law implementation on ecotourism
<ul style="list-style-type: none"> • CAMP Montenegro implementation. • 2020 Tourism Master Plan implementation (should be updated with current data). • Implementation of nature protection laws, tourism and other laws. • Public participation (information gathering, consultation) in the elaboration of new strategies and plans, through information technologies.
The promotion of skills and training focused on ecotourism
<ul style="list-style-type: none"> • University professional programs on ecotourism (masters or training courses). • Integrate ecotourism in the tourism education university offer. • Training workshops in environmental, business and language skills. • Sharing of methodologies amongst ecotourism initiatives.
The interaction and networking amongst stakeholders
<ul style="list-style-type: none"> • Public/private Partnerships. • Private networking and sharing of knowledge and information. • Associations and exchange and debate meetings. • Database of ecotourism stakeholders, to know “who is who” in the sector, and what do they do.
The gathering of relevant information on ecotourism and its communication
<ul style="list-style-type: none"> • Online platform with research studies results. • Inventories (database) of available information on environmental, social and economic issues. • International benchmarking on ecotourism. • Professional meetings and forums. • Make sure all generated information available to all stakeholders (if that information is not sensitive). • Organising an expert group to monitor ecotourism activities and assess its quality.
The development of entrepreneurship
<ul style="list-style-type: none"> • Database of entrepreneurs and ecotourism activities. • Ecotourism business incubator (fund raising, assessment and support) by the National and Local governments and universities. • Exchange program, and benchmarking. • Innovation promotion. • Creation of a “help desk” to offer support to entrepreneurs.
The promotion of ecotourism products
<ul style="list-style-type: none"> • Innovative activities. • Complementary products (transportation, accommodation). • Joint promotion. • Raising awareness, environmental education. • Promotional campaigns of ecotourism.
The conservation of natural and cultural assets
<ul style="list-style-type: none"> • Conservation of natural values of Montenegro. • Public management with private engagement. • Land stewardship initiatives.
The management of other economic activities and their impacts on the environment
<ul style="list-style-type: none"> • Urban sprawl control. • Other forms of tourism (sun and sand, cruisers...) management in terms of frequency in certain vulnerable areas. • Creation of a properly managed eco-tax to promote ecotourism. • Infrastructure development. • Agriculture and other economic land use compatibility.

4.2. Stakeholders analysis of ecotourism in Boka Kotorska

Both facilitators of the workshop, Xavier Cazorla and Xavier Sabaté, invited the participants to reflect on how every stakeholder could contribute to boost ecotourism in Boka Kotorska. The ecotourism stakeholder map of Boka Kotorska was presented as proposed by the Feasibility Study (see below), and the main stakeholders were identified:

The following table describes the role of the main stakeholders of ecotourism in Boka Kotorska.



Figure 3. Ecotourism stakeholder diagram of Boka Kotorska

source: Feasibility Study on Ecotourism for local development in Boka Kotorska

Stakeholders	Role
Eco-entrepreneurs	<ul style="list-style-type: none"> Identifying potential for business in ecotourism. Creating new ecotourism businesses. Identifying needs for entrepreneurs.
Travel agencies	<ul style="list-style-type: none"> Creating new ecotourism products. Creating new jobs. Demanding proper information on resources. Providing information on their own activities. Having direct contact with ecotourists (customers).
Professional organisations	<ul style="list-style-type: none"> Creating professional advice and practical training to entrepreneurs. Mediation between individual stakeholders and other stakeholder groups (National government, etc.). Offering services to eco-entrepreneurs (information, training, lobbying).
National government	<ul style="list-style-type: none"> Laws and strategies creation. Facilitation of proper conditions for ecotourism and exchange amongst stakeholders. Capacity building. Creating ecotourism strategies and campaigns at a National level.
Local governments	<ul style="list-style-type: none"> Coordinating actions in the municipalities and promote activities. Providing administrative services. Environmental protection through spatial planning.
NGOs	<ul style="list-style-type: none"> Lobbying to promote nature. Provide information and traditional knowledge to travel agencies. Involvement and engagement of society with nature.
Universities	<ul style="list-style-type: none"> Knowledge support to all stakeholders in all academic fields. Baseline information (inventories, compilations). Bridging gaps between stakeholders. Offering training and skills, more in a theoretical level.
International bodies	<ul style="list-style-type: none"> Offering services, studies, funds (related to certain projects). Entrepreneurship promotion. Generating and facilitating networks. Coordination with the National government to promote ecotourism policies. Monitoring the development of these policies. Facilitate and set the framework for the promotion of ecotourism.

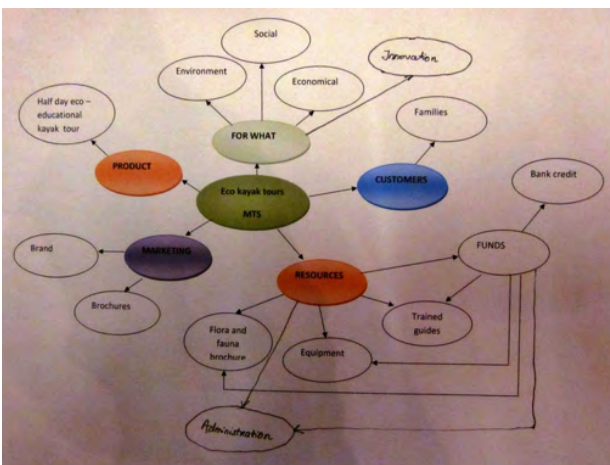


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Figure 4. Participative exercise to identify the role of the main stakeholders of ecotourism in Boka Kotorška

4.3. Entrepreneurial projects on ecotourism in Boka Kotorška

Once the stakeholders reflected on how they could contribute to promote ecotourism in Boka Kotorška, the trainees began to design their business ideas. Xavier Cazorla as facilitator presented different methodologies of strategic thinking to structure the proposals on ecotourism: business planning using mind maps. The result was a mind map for every business proposals, which were focused on eco-kayak tours, eco-bike tours, and Nordic walking activities.



5. Day three: Towards the future of ecotourism in Boka Kotorška

During the last day of the workshop the trainees learnt and practised with the Business Model Canvas to

work on their business plans. The main results and ideas of the workshop were also presented in a multi-stakeholder session.

5.1. Business model of ecotourism activities: from ideas to planning

Departing from mind maps of business ideas, the trainees designed their own business plans throughout the methodology of Business Canvas Model. Xavier Cazorla, as expert on this topic explained and exemplified the nine blocks that summarize any business model in a simple and visual way. The result was a visual planning of the entrepreneurial projects of ecotourism in Boka Kotorška generated by trainees.



© Xavier SABATÉ

Figure 5. Working on Business Model Canvas development

5.2. Final debate on ecotourism in Boka Kotorska

Finally, the main results and ideas of the workshop were presented in a multi-stakeholder session, where 16 representatives of the different interests at stake discussed on the future of ecotourism in Boka Kotorska.

The debate was structured in 4 main questions, as follows:

5.2.1. Is Boka Kotorska the place in Montenegro to promote ecotourism?

This question was intended to generate debate whether Boka Kotorska (the Bay of Kotor and its surroundings) is the appropriate scale to bear in mind when considering the feasibility of ecotourism promotion in this area. The question also wanted to focus on other parts of Montenegro that offer potential for ecotourism (such as the Durmitor mountains, Skadar Lake, and other Montenegrin National Parks).

- Most of the ecotourist activities in Montenegro happen in the North, but some support from the administrations to entrepreneurs could help distribute the ecotouristic offer in the country.
- Montenegro is the first declared Ecological State in Europe, and Boka Kotorska is a relevant part of Montenegro.
- Future Orjen Mountains National Park declaration offers a good opportunity for ecotourism in Boka Kotorska. A complementarity between coastal and hinterland attractions should be sought.
- A circular tour of 5-7 days around different ecotouristic hotspots in Montenegro could be promoted: Boka Kotorska, Skadar Lake, Durmitor, Biogradska Gora and Orjen mountains, even considering places in neighbouring countries (Bosnia and Croatia). Kotor could be a hub to connect different touristic spots in Montenegro.
- A map of ecotouristic activities in Montenegro could offer a good promotion material, and show how activities could be complemented amongst regions.
- Ecotourism entrepreneurs in Boka Kotorska should consider a bigger area than Boka Kotorska itself, without forgetting that Boka Kotorska has some ecotourist attractions by itself.
- Not only natural values must be considered, but also other attractions and assets, such as agriculture products, cultural heritage, sports... that are widely

distributed around the country. Ecotourism should take advantage of the diversity in Montenegro.

5.2.2. Are we on time to promote ecotourism in Boka Kotorska?

This question focused on the time scale of the promotion of ecotourism. It also intended to identify the main threats that could jeopardise the ecotouristic resources of the region.

- Boka Kotorska has been somewhat protected by the UNESCO protection and has not lost all of its assets, so it is still possible to develop ecotourism projects.
- There are some urbanisation projects in certain areas (Porto Montenegro, urbanisation in Lustica Peninsula, Mammula island, etc.) that could jeopardise the conservation of very important ecotouristic assets. These projects, planned in the short term and with an evident impact on the land, is not compatible with ecotourism, that needs time and investment in the long term, with a strategic view.
- Some remarkable natural resources are still present in the country, and action must be done to protect them from urban sprawl. Also in some areas, re-naturalisation is still possible.
- The traditional rural settlements and communities are being lost, and depopulation is provoking the loss of traditional landscapes.
- A more strategic, long term and responsible planning is needed.
- Technical and financial support is needed to promote ecotouristic activities in Boka Kotorska. Public support is needed to boost private investment. Some preconditions should be present so individual investors would go into ecotourism.
- The CAMP project is an opportunity to integrate ecotourism in the coastal area management of Boka Kotorska and at the same time control the unplanned urban growth.
- Ecotourism will not solve all the problems present in Boka Kotorska, but will offer a niche of alternatives.
- Mass tourism can be an opportunity for ecotourism: big tour operators may desire to offer ecotouristic products to their costumers (hotels and cruises). Ecotourism can be a good complement to the mainstream tourism -3S tourism (sand, sun, sea)- and in this way also contribute to the sustainability of these other forms of tourism.
- An important issue is the land use by big landowners, especially in coastal areas.

5.2.3. Are Boka Kotorska stakeholders ready for ecotourism?

This question was intended to deep in the debate about the stakeholder's role in the promotion of ecotourism, and especially on the relationship amongst them, and the potential of networking and collaboration.

- Most of the stakeholders are ready for the promotion of ecotourism, they only need to do the first step forward.
- It is not necessary to have a full consensus on ecotourism promotion, but an initial phase of development could be started as early as possible.
- Investment in training and skill building will be needed, especially for the first entrepreneurs. Some stakeholders will wait others to do the first step and follow their tracks.
- Competence in ecotourism is not as present as in other tourism sectors, because ecotourists tend to look for a very specific offer. Collaboration amongst companies will be very important to have a more complete offer.
- Ecotourism initiatives will find support from the green economy promotion deriving from the CAMP project.

5.2.4. Does it make sense to boost ecotourism in Boka Kotorska?

This final question wrapped up the debate and was mainly a rhetorical question that needed not further detail.

After considering the results of the debate, all stakeholders present in the debate agreed on that promoting ecotourism in Boka Kotorska not only made sense, but it should be a priority for the sustainable development in Boka Kotorska.

At the end of the Workshop the ecoentrepreneur trainees were handed a certificate of participation.

These proceedings will be integrated into the Feasibility Study on “Ecotourism for local development in Boka Kotorska (Montenegro)”, commissioned by RAC/SPA and SCP/RAC, which aims to analyse the sector of tourism and ecotourism in Boka Kotorska, and assess the potential of ecotourism entrepreneurship and businesses in Kotor. The study will come up with recommendations and conclusions on the implementation of ecotourism in Boka Kotorska in order to enable integrated coastal zone management of the coastal area of Montenegro. The study is planned to finish at mid-2014.



Figure 6. Final debate on the future of ecotourism, during the multi-stakeholder session



Figure 7. Some of the participants and speakers, at the end of the Workshop

ANNEX 2: DETAILED SCHEDULE

Thursday, 30th January

Lecturer / facilitator	Content
Credentials	
M. CHERIF J. KNEZEVIC	Institutional presentation (10 min) CAMP Montenegro: Jelena Knezevic, Adviser to the Minister and CAMP National Coordinator (10 min)
X. SABATÉ	Introduction to the dynamics of the Workshop: goals, timing... Energizing activity to introduce and facilitate interaction amongst participants
Coffee Break	
J. KNEZEVIC	Greening economy in Boka Kotorska in line with CAMP application - Jelena KNEZEVIC, Adviser to the Minister and CAMP National Coordinator
I. TRUMBIC	Pollution reduction as a precondition for greening economy: ECAP implementation - Ivica TRUMBIC, MEDPOL expert
C. FARINEA	Master plan for Green and Blue Economy in the Boka Kotorska - Lorenzo FACCO, DFS Engineering
Lunch Break	
X. CAZORLA	Ecotourism: promoting conservation and local development through entrepreneurship
I. MORIC	Tourism model in the Boka Kotorska Ecotourism notions
V. LEKOVIC	Ecotourism resources in the Boka Kotorska
Coffee Break	
X. SABATÉ X. CAZORLA	Working group's session: status of ecotourism in Boka Kotorska. SWOT analysis

Friday, 31st January

Lecturer / facilitator	Content
Credentials	
M. CHERIF	UNEP/MAP - SCP/RAC Lines of actions and projects to promote Green entrepreneurship in the Mediterranean
D. CEBRIÁN	Presentation of MedMPAnet project
X. SABATÉ	International benchmarking: Land stewardship in Catalonia and Europe: engaging citizens and businesses in nature conservation: a successful model for partnership
X. CAZORLA	International benchmarking: Ecotourism in protected areas and the European Charter for Sustainable Tourism. Eco-entrepreneurship case study in Catalonia “SOMPirineu”
Coffee Break	
X. SABATÉ A. FILIPOVIC	The Feasibility Study desk research
X. SABATÉ	Who? Public participation and governance in protected areas and ecotourism. Networking tools. Identifying the key stakeholders and establishing collaborative networks
Lunch Break	
X. SABATÉ X. CAZORLA	Working groups session. Key stakeholders of ecotourism in Kotor
X. SABATÉ X. CAZORLA	Working groups session: Development of proposals (lines of action for the promotion of ecotourism in the region)
V. LEKOVIC	Ecotourism resources in the Boka Kotorska
Coffee Break	
X. CAZORLA	<ul style="list-style-type: none"> • What ? Devising a winning strategy: innovation, strength, environmental and social value and economic/ financial viability • How ? Business Model Canvas

Saturday, 1st February

Facilitator	Content
Credentials	
X. SABATÉ X. CAZORLA	Working groups session: Development of entrepreneurial projects for the promotion of ecotourism in the region
Coffee Break	
X. SABATÉ X. CAZORLA	Working groups session: finalisation of entrepreneurial projects
SCP/RAC, RAC/SPA, MSDT-MNE, KOTOR MUNICIPALITY	Multi-stakeholder’s meeting opening
Lunch Break	
X. SABATÉ A. FILIPOVIC	Conclusions and next steps: Ecotourism for local development in Boka Kotorska Feasibility Study
X. SABATÉ X. CAZORLA	Debate on the future of ecotourism in Boka Kotorska
SCP/RAC	Closing Ceremony

ANNEX 3. SPEAKERS

Xavier CAZORLA, eleMents: Master in Environmental Sciences for the Autonomous University of Barcelona (UAB), coursed Doctorate programmes in Barcelona and Venice on Environmental Sciences and Sustainable Development. With a broad international experience in Latin America, where participated in diverse projects for the Mexican government and universities to define local and regional strategies in natural protected areas. Also experienced in European countries as member of the European Environment and Sustainable Development Advisory Councils Network (EEAC), chairing the Biodiversity Working Group. Was also coordinator of the Advisory Council on Sustainable Development of Catalonia (CADS), where promoted the EcoturCAT network on Ecotourism. In 2011 founded eleMents, offering strategic assessment for local development and entrepreneurship in Ecotourism and Responsible Tourism sector. He has participated as guest speaker in numerous workshops and seminars, being specialized in public-private partnerships, networking, capacity building and social involvement.

Dr. Daniel CEBRIÁN, Regional Activity Centre for Specially Protected Areas (RAC/SPA): Daniel CEBRIÁN has been contributing for three decades on fields related to conservation research and biological diversity preservation policies in the Mediterranean region, mostly in marine and coastal ecosystems but also in terrestrial ones. He has a solid knowledge on biodiversity, focused on conservation biology of threatened species and their habitats in coastal and marine ecosystems, as well as related human factors, including fisheries, pollution and anthropologic socioeconomic issues. His work has taken him to know and act on behalf of many countries' natural resources embracing four continents, and to represent regional institutions in more than a hundred international events, meetings and negotiations. He is presently the Strategic Actions Programme (SAP BIO) officer of the Protocol for Specially Protected Areas & Biological Diversity (SPA/BD) of the Barcelona Convention, within the Regional Activity Centre for Specially Protected Areas RAC/SPA, a UNEP Mediterranean Action Plan (UNEP/MAP) implementing agency. Among recent activities, he has developed and launched a strategy and a linked project (2009-14) to boost the Mediterranean countries capacity to create national networks of MPAs and contribute to a Mediterranean regional one. In the same line he has boosted a project (2008-15) to favour the creation of multilateral MPAs embracing the Mediterranean open seas, including deep seas.

Meryem CHERIF, Regional Activity Centre for Sustainable Consumption and Production (SCP/RAC): Master's degree in Mechanical and Energy Engineering, from Art&Metiers Paristech and Universidad Politécnica de Madrid. International experience acquired through different projects in South America, Europe and the Mediterranean region (participation in FAO project for the assessment of opportunities for Biofuel industrial production in Chile, project manager in FP7 BAT4MED "Boosting best available techniques in the Mediterranean Partner Countries" for the adaptation of IPPC in Morocco, Tunisia and Egypt, assessment of used vegetable oil recycling industry in Catalonia, among others). Since 2011, project manager at SCP/RAC, working on the integration of SCP in the Barcelona Convention and its protocols as well as UNEP/MAP strategies, through projects such as EcAp; CAMP Almeria, CAMP Montenegro; Currently involved in launching the EU SWITCH-Med Demo Component on Green entrepreneurship and Civil Society; Networking and Promotion of Sustainable Consumption and Production in National Action Plans around the Mediterranean countries.

Chiara FARINEA: Architect and Urban Planner in D'Appolonia, Italy. D'Appolonia is an Italian engineering consulting company active on the international market since the early 80's. During the early years, D'Appolonia pioneered engineering applications for industrial and power facilities. Since then, the Company has developed a multidisciplinary staff with extensive capabilities in the earth sciences, civil, environmental and structural engineering, risk assessment, health and safety, chemical and process engineering, system and transport engineering, electronics, telecommunications, and innovation engineering, capable to identify and manage unconventional solutions for industrial and engineering needs.

Ana FILIPOVIĆ, CEED: postgraduate student on American College for Management and Technology, Rochester University from Dubrovnik and current student of Marketing master studies in Faculty of Economics from Podgorica. Besides working in the hospitality industry, I used to work in C GROUP construction Company as an administrative manager. Now I am working in the CEED Consulting as a junior researcher on the projects such as Global Entrepreneurship Week, etc. I was involved in the several other programs as a translation and research assistance such as Public Awareness of Energy Efficiency in the household, CAMP Montenegro, MIDAS, etc.

Jelena KNEZEVIC: Adviser to the Minister for the Environment, Ministry of Sustainable Development and Tourism. Coordinator for the EU integration process in the field of Environment. In 2011 becomes National Coordinator for Coastal Area Management Programme of Montenegro (CAMP Montenegro) and development of the National Strategy for Integrated Coastal Zone Management of Montenegro implemented by UNEP/MAP. In 2012 was pointed as Chair Person of the Mediterranean Commission for Sustainable Development.

Vesna LEKOVIĆ: graduated on Faculty of Philosophy, University of Montenegro, Department for English Language and Literature. She is licensed tourist guide. Since 2004, she has been employed in NGO EXPEDITIO, Centre for Sustainable Spatial Development as an Administrative and project assistant performing various administrative tasks, translation from and into English, including official correspondence as well as some publications issued by Expeditio and various tasks related to assistance in the realization of activities, projects, campaigns concerning various topics of sustainable development.

Ilija MORIC: PHD in Marketing Aspect of Rural Tourism Development in Montenegro. Professor and research assistant on Marketing in Tourism, Consumer Behaviour in Tourism, Marketing Communications in Tourism, Global Marketing, Business Statistics at the University of Montenegro, Faculty of Tourism. Since 2007 Member of Board and responsible for Project Manager, Planning, Financial management at the Olive growers Association BOKA.

Xavier SABATÉ, Espai TReS: Environmental scientist (UAB, 2001), postgraduate in protected areas (2002) and DEA (Master) in physical geography (UdG,

2009). I have complemented my academic training in disciplines such as participation, communication and planning. I balance my academic training on land and environment with the skills needed to promote a more responsible land management, such as participation and communication skills, as well as networking, relationship building and team facilitation. During more than 10 years of professional activity, I have been devoted to the sensibilisation and empowerment of groups and public bodies to enhance environmental conservation. Since 2002, I organised and participated in seminars, training courses and other events to share my expertise in the field.

Ivica TRUMBIC: Architect-planner, has studied in Slovenia, Netherlands and Croatia. During his career he has been focused on natural resources management and, specifically, on urban and regional planning and Integrated Coastal Zone Management (ICZM). His career culminated with development and entry into force of the Barcelona Convention's Protocol on ICZM. He was the director of the Priority Actions Programme Regional Activity Centre of the UNEP's Mediterranean Action Plan from 1994 to 2009. From 2009 to 2012 Mr. Trumbić worked for UNEP managing GEF Strategic Partnership for the Mediterranean Sea Large Marine Ecosystem (MedPartnership) project. He is now working as a senior consultant for UNESCO, World Bank, UNDP, UNEP, UNOPS and other UN organisations on coastal, marine, water and urban issues. His recent interest is adaptation to climate change through ICZM and spatial planning. He has published large number of publications, and has been associated as editor or member of the board of several international scientific journals and international organisations. Mr. Trumbić is also guest lecturer at the University of Split, Department of Civil Engineering, Architecture and Geodesy teaching on urban and regional planning in coastal areas.

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