



CETINJE CULTURAL TOURISM STRATEGY **A link across nature and culture**

By Professor Tom Selwyn, Dr Julie Scott, Jonathan Karkut & John Bell



April 2008

TABLE OF CONTENTS

LIST OF APPENDICES	4
LIST OF ACRONYMS AND ABBREVIATIONS	5
1 MONTENEGRO TOURISM: COAST, CULTURE AND NATURE	6
1.1 Summary of WTTC Montenegro country report	6
1.2 Elements of Cultural Tourism	9
1.2.1 The nature of cultural attractions	9
1.3 The appeal of cultural tourism destinations	11
1.3.1 City breaks	11
1.3.2 Towns and cities as hubs	12
1.4 Developing an integrated cultural tourism destination	14
2 THE NATIONAL CONTEXT	17
2.1 Montenegrin tourism and economy	17
2.1.1 Transition	17
2.1.2 Capital	17
2.1.3 Market	19
2.1.4 Public and private sectors	19
2.2 Responses by Montenegrin authorities, UNDP & GTZ	20
2.2.1 The national spatial plan	20
2.2.2 Local spatial plans	21
2.2.3 The national tourism organisation	22
2.3 Some preliminary conclusions	25
3 CETINJE: THE LOCAL CONTEXT & CULTURAL TOURISM OFFER	27
3.1 Cetinje – Its economic and cultural context	27
3.2 Cetinje and its cultural tourism offer	29
3.2.1 Religious sites	32
3.2.2 The five strands of the national museum	32
3.2.3 The national library	34
3.2.4 National parks and natural heritage	35
3.2.5 Rural heritage including food and drink production	36
3.2.6 Souvenirs	37
3.2.7 Signage and interpretation	38
3.3 Intangible heritage around Cetinje	41
4 WHAT THE TRAVEL MARKET WANTS & HOW IT'S GOING TO GET IT⁴³	
4.1 The market	44
4.2 The traveller or holidaymaker	46
4.3 How do they travel?	46
4.4 Attracting the low cost airlines	49
4.4.1 Low cost airlines = low spending visitors	49
4.4.2 What does this do for Cetinje	49
4.5 Niches	50
5 THE CULTURAL TOURISM STRATEGY: AN ACTION PLAN	51
SGI Management of the strategy	51
SGII Spatial planning	55

SGIII	Education and training	56
SGIV	Local and regional cultural tourism	58
SGV	Exhibitions and festivals	59

LIST OF APPENDICES

APPENDIX I	PROGRAMME OF MISSION	61
APPENDIX II	REFERENCES	64
APPENDIX III	ADDITIONAL CONTACTS	65

LIST OF ACRONYMS AND ABBREVIATIONS

EC	European Commission
EIA	Environmental Impact Assessment
EU	European Union
GTZ	Deutsche Gesellschaft für Technische Zusammenarbeit
NGO	Non Governmental Organisation
NP	National Park
NSP	National Spatial Plan
NTO	National Tourism Organisation
SG	Strategy Group
TO	Tourist Office
UNDP	United Nations Development Programme
VET	Vocational Educational Training
WG	Working Group
WTTC	World Travel and Tourism Council

CHAPTER 1

MONTENEGRO TOURISM: COAST, CULTURE AND NATURE

It is appropriate to first of all introduce the general state of tourism development in Montenegro, as this provides a helpful background scene to which the strategy adds specific reporting, commentary and a plan of actions when specifically considering the niches around cultural tourism. Such a summary has been effectively delivered in the World Travel and Tourism Council (WTTC) report, 'Montenegro travel & tourism: unlocking the potential for growth' from 2007. Therefore, rather than re-inventing the wheel, this section will précis the key indicators and suggestions made in that report.

1.1 SUMMARY OF WTTC MONTENEGRO COUNTRY REPORT 2007

Diversification

The report makes it very clear that both public and private sectors now see that a major disparity has been created between the Coast (South) and Mountains (North/hinterland). The approach for the coming years, which has already been set in progress, is to rapidly redress the situation by opening out the 'products' offered by Montenegro and re-assessing new as well as existing markets that it can access and benefit from.

When considering such a widening out of products, it is indicated that there is a significant opportunity to develop a range of top quality niches that are linked and related to the broad category of 'nature tourism'. These in turn offer the chance for tourism to flourish well outside of the narrow 'summer season' offered through the classical brand of coastal tourism, which currently dominates the industry in Montenegro. Just to re-iterate that seasonality, it was reported that the period between May and September accounts for over 90% of overnight stays and over 80% of gross arrivals.

Thus far the Ministry of Tourism & Environmental Protection has identified 'mountain tourism' as the main priority development area. Working alongside the various public and private stakeholders, plus international donors, a spread of new tourism products is evolving around the 'mountain tourism' theme. As well as the most obvious development of skiing, other sporting and adventure activities have been viewed for growth. It has been acknowledged that for these to thrive, linkages between the coast, central plateau and Northern mountains have to be expanded. **Cultural tourism, with elements based in developed urban settings as well as across thinly populated rural and mountain hinterlands, can act as the ideal facilitator to ensure such bridges are identified and develop effectively.** This point is also picked up by the WTTC report, but in terms of action, the furthest that report stretches is to recommend that the museums and national park should start charging an entry fee in order to gain more from its tourism potential.

One other niche that is identified for growth is in the area of 'gastronomic and agro-tourism'. Acknowledging a continuing interest in this sector, initiatives have already been launched to coordinate and promote wine routes and production of foods such as local cheeses and hams. With associated traditions and festivals, this element of the cultural heritage has been earmarked to make a significant contribution to the growth of businesses such as guesthouses and restaurants.

Human resources

In terms of the labour market, it is equally important to establish what the needs are for the whole tourism sector in the coming period. It has already been suggested that in response to continuing growth and diversification, Montenegro will require a further 1,000 new qualified

tourism staff each year for the next two decades. Opportunities for re-training are an urgent need and in particular, possibilities for 'life-long learning' have to be redressed. This is in acknowledgment that not all of the new trainee positions can be taken by school or college leavers. With the closing of factories and loss of jobs in previously dominant sectors, such as light industry, chances have to be created to re-train staff that have already passed through one career or skills set. In order to respond to this situation, there have to be greater linkages between central government, local (municipal) authorities, the private sector and the education/training providers.

Another area in need of rapid response is within the planning departments of the municipalities. In order for them to be able to respond effectively in drawing up and implementing local spatial plans that are in accord with the national spatial plan, local authorities will also require further training and advice to allow them to ensure that all sectors, including tourism, can fulfil the maximum growth whilst ensuring they adhere to sustainable principles. **These points will be addressed in much greater detail within chapter 2 of this strategy.**

Tourism Planning

It is emphasised within the WTTC report that stress on encouraging private investment does not mean that the idea of planning should go out of the window. On the contrary, more than ever a balance is required between economics and people, culture and environmental demands. For that balance to be struck, stronger public-private stakeholder networks, dialogue and cooperation has to be provided. Furthermore, such meetings and opportunities have to continue on a long-term and regular basis to ensure all parties understand what initiatives are happening and what each stakeholders role is.

One major step identified is for the Montenegro's urban and spatial plan to be adopted and facilitated at the national and local levels. This means that local plans have to be developed which tie in with the wider national plans. Such integration is vital if the wider aim for sustainable tourism development is to be achieved and the strategy of marketing 'unspoilt' or 'unique wild beauty' of Montenegro is a realistic and accurate one. The WTTC further emphasises this issue by recommending that a greater sharing of information and planning intentions between local and national authorities, would benefit all parties on numerous fronts. Amongst the key concerns, it would help resolve many cases of illegal construction and more generally create a more coherent and collaborative environment, rather than one where narrow interests and priorities are served.

Additionally WTTC identifies the need for government to re-double it's efforts to balance growth on the coast with active encouragement for investment in the non-coastal regions.

Infrastructure development

Direct air transport links are a key feature, if diversification is to be sustained. Hence, the open skies policy needs to be followed through with wider development of the two international airports. One element of this development is to attract the 'budget' airlines in. As will be discussed at length in chapter 4, this move can be tied in with the diversification and growth into nature and cultural tourism niches. Also it will shift a current reliance on Dubrovnik as an entry point for certain markets (UK, France) and take away some of those losses to Southern Dalmatia which is a market rival especially in the cultural tourism niche. The bringing in of a wider range of air routes additionally helps to further diversify the tourism source markets for Montenegro – another action that WTTC sees should be acted upon rapidly.

When reporting on the current breakdown of source markets, the WTTC report outlines that Russia and Bosnia-Herzegovina are now the two leaders in terms of absolute volume of arrivals. The great majority of the Bosnian arrivals are resident in the Republika Srpska entity. As the prominent religion of both of those markets is Orthodox Christianity, this suggests that there is significant potential to tap those sources for religious tourism around Cetinje municipality (the host for many of the most important relics and sites of the Orthodox Church in Montenegro).

At the same time, WTTC does raise the issue that although there is a basic identification of source markets, very little research has been conducted to examine what tourism niches require in a Montenegrin context and also how those markets arrange and book their holidays to Montenegro. It is therefore, recommended considerably more research and information has to be gathered, in order to assist the devised strategy and also to be able to react to future trends, areas of demand and threats.

Montenegro Ministry of Tourism & Environment report for 2007

The positions highlighted in the WTTC report, are further emphasised in the tourism & environment ministry's report covering the tourism season for 2007. Although very positive data is presented showing increases in 2007 for tourist arrivals, overnight stays and revenue, it is clear the growth in the industry is clinging tightly to the coastal strip. So a strong need to diversify both the tourism products and markets is mentioned, and this translates in to the creation of sustainable tourism developments for the northern and central regions of Montenegro. Based on the offer that is already visible across the country this means that a range of niches around nature and culture are the most logical to develop further.

The following section thus provides an introduction as to what is understood most widely as being 'cultural tourism' and how that is linked and woven in with 'nature tourism'.

1.2 ELEMENTS OF CULTURAL TOURISM

The term 'cultural tourism' is arguably rather misleading, suggesting a discrete and homogeneous category of tourists and tourism types, which can be distinguished from others which are NOT 'cultural'. It is more useful to think of 'cultural tourism' in terms of the development of a destination which can appeal across a wide variety of tourists, engaged in a range of tourism activities. We start by defining the nature of cultural attractions, and then consider how they may fit into the infrastructure of tourism.

1.2.1. THE NATURE OF CULTURAL ATTRACTIONS

Many currently widespread ideas concerning cultural tourism derive from a particular model of aristocratic and upper class tourism as practised in Europe during the 18th and 19th centuries, when elite tourists travelled well-worn itineraries visiting 'must see' cultural attractions en route. These itineraries and attractions were 'culturally sanctioned', in that they represented a prevalent consensus concerning what was meaningful, valuable and appropriate for producing the northern European idea of a cultured and civilised gentry. With their focus on the antiquities of Greece and Rome, their goals of education and enlightenment were restricted largely to an appreciation of the classic civilisations of the past, and did not extend to an interest in contemporary Greek and Italian society, which were generally regarded as constituting an unwelcome distraction to the visitor. Furthermore,

there was little room for introducing innovations into the cultural itinerary, since the culturally sanctioned hierarchy governed the value and status of what could and should be visited.

This is no longer the case.

The increasing democratisation of European society and access to tourism in the latter part of the 20th century, alongside changing attitudes to culture and the nature of status competition, has transformed the character of cultural attractions:

- **The dominance of a single 'high culture' cannon has been broken.** Iconic cultural sites continue to top a hierarchy of 'must see' attractions, but they have been joined by a much wider range of cultural attractions which can include the contemporary and the ephemeral, as well as the 'timeless' and the classic.
- **The range of 'authoritative arbiters' of what constitutes a valuable cultural attraction has expanded exponentially,** in terms of available guidebooks, internet sites, on-line blogs, press and TV features, etc
- **The social value of cultural tourism has changed in the tourist-generating societies of northern Europe** – status now attaches, for example, to frequency of **short-break trips**, the discovery of **unusual and 'off the beaten track'** destinations, and the **'authenticity'** of cultural experiences
- **Contemporary societies now constitute cultural attractions in their own right.** In particular, visits to towns and cities are now marketed as cultural attractions in themselves, offering **'slice of life'** experiences incorporating gastronomy, shopping, the contemporary arts, and something more indefinable, which we might characterise as 'conviviality' – as well as conventional historic attractions.

In short:

- **An aspect of 'cultural tourism' now comprises at least part of the holiday experience of most tourists,** and may take the form of
 - An add-on to the main activity of the holiday – two-centre trips, excursions, a day away from the beach, etc
 - 'Local colour' – adding to the distinctiveness of destinations and the range of secondary (e.g. evening) activities for tourists
 - The main activity of the holiday

Destinations need, therefore, to integrate their cultural offer with other aspects of the tourism offer, and in particular, natural heritage.

- **Tourists are seeking 'an experience' from cultural attractions, and not just 'education'.** Destinations have to work hard to provide tourists with that experience. Museums and heritage sites may draw people to a destination, but they are not enough on their own either to hold tourists, or to encourage them to spend money.
- **The range of tourists seeking a 'cultural experience' is wider than ever before.** In developing their 'cultural products', destinations must be aware of their market segments, and tailor their products accordingly – school parties, for example, require something different from groups of seniors.
- **Culture doesn't just happen in cultural institutions such as museums, art galleries and heritage sites** – the responsibility for developing the cultural attractiveness of a destination, therefore, has to go beyond tourism professionals and cultural specialists, to

bring in sectors including retail, restaurants, agriculture, universities and local groups, who may not see themselves as having an obvious tourism connection. Their input is vital for the creation of the kind of vibrant cultural tourism destination people will want to come to – and local culture should in turn benefit from an increase in opportunities and resources

1.3 THE APPEAL OF CULTURAL TOURISM DESTINATIONS

As should be clear from the foregoing, cultural tourism can occur across a range of destinations and settings. Towns and cities are obvious candidates for cultural tourism development, with urban tourism and, in particular, **city breaks**, growing in popularity across Europe. However, cities exist within hinterlands, which may also offer attractions for incorporation into the cultural tourism offer – coastal and mountain regions, villages and rural cultural landscapes, natural parks etc. Urban centres also need to develop their potential as the **hub** of a wider cultural tourism offer.

Realising the full potential of cultural tourism destinations requires us to broaden our ideas about tourism and its linkages, and to take a holistic view of the destination environment.

1.3.1 CITY BREAKS

According to the European Travel Monitor (ETM), Europeans made about 35 million city trips abroad in 2000, comprising 22 million long holidays of four nights or more and close to 13 million short breaks of 1-3 nights in length. Urban or city trips accounted for close to one-third (32%) of all short breaks – by far the most important type of short holiday taken by Europeans

Tourism Insight 2002

Motivations for visiting a particular city may include visiting a cultural attraction, or a group of attractions, and participating in a special event, such as a festival, or a conference. Business and conference visitors, cultural tourists, and even those visiting families and friends and not staying in commercial accommodation, are drawn into the available activities, which typically comprise sightseeing, including nearby attractions outside cities, walking around cities and generally soaking up the atmosphere, trying their restaurants, bars, nightlife and shopping.¹ All of these add value to a destination:

- as opportunities for **income generation**
- as opportunities for contributing to the **distinctiveness** of the destination, in an increasingly competitive market place.

Towns and cities promoting themselves as cultural tourism destinations need to enhance the experience of the town at the level of:

¹ Trew and Cockerell: The European Market for City Breaks *Tourism Insight 2002*

- **accommodation:** renovation and conversion of old buildings to city centre 'boutique' hotels and good quality bed and breakfast accommodation provide an economic use for the vernacular heritage and offer cultural experience of city centre living
- **cultural institutions:** e.g. museums, theatres, cinemas, concert halls, heritage sites, and other locations for cultural events and activities, such as libraries, galleries, public halls, educational establishments – and in the summer, outdoor locations including parks, gardens, heritage sites etc – ensuring access (opening hours), information and interpretation, lively and innovative programming and events, structural care and maintenance etc; and support for performers, artists, musicians – theatre groups, bands and orchestras – amateur, student and professional; and for cultural specialists, curators, guides, etc.
- **town and streetscape:** collective spaces are also cultural settings, with their own stories to tell (the intangible heritage of the town and its people), offering opportunities for public sociability and conviviality, the impromptu and the spontaneous. Requirements include the care and maintenance of vernacular heritage and shop frontages; enhancement of streets through planting, flowers, hanging baskets etc; cleaning and rubbish collection; maps, signage and interpretation; care of green spaces, parks and gardens, etc.
- **shopping and retail:** shopping environments such as streets and market squares where visitors can browse, offering variety and interest, and the opportunity to buy locally produced goods, including arts, crafts, fresh produce – may require measures such as traffic control, organisation of regular markets, licensing arrangements, and a policy of setting local taxations and rents at levels which encourage diversity and innovation. Restaurants also offer important occasions for conviviality and opportunities for showcasing local food culture and gastronomy

1.3.2 TOWNS AND CITIES AS HUBS

As Trew and Cockerell² note, towns and cities may be located in coastal, mountain or other areas, enabling people to visit two or more types of destination in one trip, thereby both **adding to**, and **benefiting from**, the strength of the **wider local and regional tourism product**, cultural itineraries, etc.

What functions do urban centres fulfil as cultural tourism hubs?

- **accommodation** centres for visits to attractions in the region
- **information** points, alerting visitors to the attractions in the vicinity and how they can access them
- **transport** hubs – including tourism dedicated functions, such as tour operators and tour guides specialising in the local region
- **stopping points** or **centres** for cultural itineraries – including wine routes, gastronomic tours, walking and cycling trails etc (e.g. selling maps, guidebooks, supplies and equipment; offering bicycle hire, repair and guide facilities; showcasing and raising awareness of products and attractions through shops, restaurants, bars, museums etc
- As **sales** and **marketing** centres for regional souvenirs and products

² *ibid*

- As the focus for **critical mass** in the cultural tourism offer, **increasing length of stay** by offering variety (e.g. evening entertainment and diversions), and thus encouraging the development of a **network of primary and secondary tourist attractions** in the city and surrounding region

Lancaster – a cultural tourism hub ...

The city of Lancaster in the north-west of England seemed to be in terminal decline in the 1970s, but has successfully re-invented itself as a the hub of a regional cultural tourism offer combining 'City, Coast and Countryside'. Lancaster has capitalized on its 18th century built heritage, with a series of themed festivals and events, the development of tours and trails and supporting material, and the promotion of its museums, theatres and arts centres. The city's promotional material features local legends, arts and live performance, and famous film locations in the area, and provides information and links to local towns on the coast and the nearby Lake District and Trough of Bowland, both areas of outstanding natural beauty; coastal trails; and the famous canal network, which offers boating and waterborne holidays; as well as city nightlife, food and drink, etc

<http://www.citycoastcountryside.co.uk>

1.4 DEVELOPING AN INTEGRATED CULTURAL TOURISM DESTINATION

Developing an integrated cultural tourism destination requires a coordinated approach, paying particular attention to:

- **The development of human resources:** the opportunities and activities outlined above require a range of education and skills. These include:
 - **Hospitality sector skills:** including those appropriate for running small, independent premises; culinary and catering skills; and their oversight (licensing; monitoring and enforcing standards etc)
 - **Front line public relations:** in information centres, interpretation and tour guiding
 - **Cultural specialists:** these include
 - curators and guides in the cultural institutions, and for the city and region in general
 - cultural 'entrepreneurs' to develop and maintain a programme of cultural activities and events, and the stock of knowledge about the locality which is part of the **cultural tourism capital**
 - specialists in conservation skills for the maintenance and restoration of historic buildings, cultural properties, vernacular heritage
 - **Retail skills:** business and entrepreneurial skills; accessing and nurturing local suppliers
 - **Art and design:** renewing and supporting local craft and souvenir production, as well as contemporary production and innovation
 - **Marketing and sales:** not only for the destination as a whole, but for discrete elements *within* the local offer – e.g. packaging and selling local attractions, routes etc

- **Defining and developing the cultural tourism product:** identifying both the existing and potential cultural tourism assets and making them accessible to visitors, for example, by
 - **Excavating local stories and histories** – for example, by gathering oral histories that give visitors the opportunity for a glance *behind* the scenes
 - **Producing brochures, maps, booklets, audio tours etc** – telling visitors about the place, what there is to see, how to get there, what to look out and listen for, etc
 - **Creating festivals, exhibitions and events** – these include both signature events that put a place on the map, but also a routine of cultural activity
 - **Tailoring the cultural product for different audiences** – through, for example, interactive exhibitions and events aimed at different age groups, interest groups etc
 - **Developing and renewing the range of locally produced arts, crafts, souvenirs etc** – matching quality of local design with the requirements of the tourist market
 - **Researching and creating as appropriate local recipes, dishes, gastronomic or other itineraries** – and creating the supporting publicity and interpretative material (see above)

Heritage consists of more than just buildings ...

Numbers of visitors to Canterbury Cathedral began to decline in the mid 1990s, and the Cathedral realised the need to market itself and work on the experience it presents to visitors: -

'The Cathedral is presented as a living, working community, and a whole range of 'behind-the-scenes' facilities have been introduced to make visitors understand that this is not just a beautiful building, but a place where the work started by the monks so many years ago continues to this day.

'For example, visits to the Stained Glass Studio, Stonemasons' Yard, Archives, Library or workshops by the choirmaster/organist are arranged. Exquisite church vestments are available for viewing, and lectures on any subject from religion to stained glass conservation can be booked. These facilities are very popular and have helped build up a better understanding of the Cathedral's work and bring in much needed funds ...

'With the introduction of charging for entry, the quality of the visitor experience and visitor care has become even more important and a lot of effort goes into training staff and the Cathedral's 350 'visits volunteers'. The Cathedral's people are its human face, and can make or break the relationship with visitors. This was shown most clearly in a recent visitor satisfaction survey, which confirmed that visitors who had been in touch with staff/volunteers enjoyed their visit considerably more than visitors who had no contact with staff.'

Heslop T 2004 Marketing a Cathedral on a Shoestring

- **Developing the regulatory framework:** cultural tourism requires a regulatory and legal framework which will **protect and conserve** the vernacular and monumental cultural heritage, natural environment and public spaces, which are essential **signature elements** of the cultural tourism destination; but which will also set out clear guidelines supporting appropriate development and entrepreneurial activity in the public and private sector. Measures include:
 - **Conservation guidelines**
 - **Planning and zoning regulations**, incorporating environmental impact assessments etc
 - **Licensing** of accommodation and other tourism businesses
 - **Tax and revenue raising**
 - **Implementation, monitoring and enforcement** – also requires investment of resources, but this is vital to safeguard the cultural tourism product, distinctiveness and reputation of the destination – once this has gone, it is extremely hard to win back
- **Institutional capacity building:** cultural tourism is a **total product**, involving all aspects and sectors of the locality, not just a discrete 'hospitality and tourism' sector. It requires coordination and the **promotion of partnerships** across a range of individual and corporate, private and public sector, government and civil society actors, to achieve the benefits of synergy and significant economies of scale. Actors include:

- **Local, regional and national tiers of government:** which may share responsibility for natural assets and cultural heritage properties, revenue raising etc
- **Private sector interests:** development of **Chambers of Commerce, Hoteliers Association, Restaurant Association, Food Producers Associations etc** – to represent the interests of their sector, carry out self-regulation, training etc
- **Civil Society interests** can be involved in the development and protection of the cultural tourism product through their interest and activities in the arts, local histories, the environment etc. These may include: civic amenity groups; local history groups; schools and educational establishments; arts organizations etc

Kent, in the south-east corner of England, has seen the formation of a number of partnerships by local actors, institutions and attractions, based on the fixed contributions of each member. These include:

The Kent Tourism Alliance: *primarily a marketing consortium, benefits from INTERREG funding from the European Union, and has an annual budget of some £1,000,000 to market Kent as a visitor destination. Members include Canterbury Cathedral, Eurotunnel, Leeds Castle (near Maidstone), The Hop Farm (a visitor attraction and festivals venue), Kent Hotel Group, Shepherd Neame (local brewery), Penshurst Castle, Museum of Kent Life, English Heritage, District Councils and Kent County Council. Membership buys exposure in the Kent Visitor Guide and consumer online and print media in the UK, Belgium, the Netherlands and France, as well as the KTA's PR efforts, research, market intelligence and database.*

Cruise Connection: *a marketing partnership with Dover Harbour Board, Manston Airport, Kings Ferry Coaches, Canterbury Cathedral, Leeds Castle, English Heritage, Tourism South East and Kent County Council to market Dover as a cruise line destination. Gives exposure through trade advertising, sales missions to the USA, Seatrade exhibitions in Miami and Germany and a much stronger relationship with cruise line operators.*

Canterbury Attractions Group: incorporates a number of city-based attractions, including Canterbury Cathedral, English Heritage (for St Augustine's Abbey), Canterbury Tales, Canterbury Museums, which each contribute £2,500 towards joint advertising and exhibitions, mainly aimed at the travel trade. Advertisements, flyers and leaflets advertise 'Canterbury – full of delightful surprises'.

Source: Heslop T 2004 Marketing a Cathedral on a Shoestring

CHAPTER 2

THE NATIONAL CONTEXT

2.1 MONTENEGRIN TOURISM AND ECONOMY

Tourism development in Montenegro is taking place within a so-called 'transitional' economy in which the boundaries of public and private ownership and control are shifting. This section of the report briefly outlines some of the main implications of this shift, the responses by national, international, and local institutions to it, and the position adopted by the present strategy. From the very specific point of the view of the tourism industry, the section thus addresses questions on the nature of transition, capital, the market, and the relation between private and public sectors in a tourist economy. The various responses will then be described.

2.1.1 TRANSITION

The term 'transition' is generally applied to those economies, such as Montenegro's, that are moving through a period of structural change involving, amongst other things, a shift from centralisation to de-centralisation, from largely public ownership and control to greater privatisation, 'socialism' to 'capitalism', and (as in the case of many of the states in the South Western Balkans) greater involvement with the European Union.

From the point of view of Montenegro's tourist economy it is important that the implications of such economic transition be understood. To this end this part of the report outlines our views on the nature of tourist capital, the tourist market, and the relation in a tourist economy between the public and private sectors.

2.1.2 CAPITAL

The term capital is most readily associated with financial capital and this does, of course, play a role in investment in the tourism industry. However, before coming to the role of financial capital, we need to agree on what constitutes a country's specifically tourist capital.

The first aspect of any tourist capital is nature: coasts, mountains, lakes, rivers, flora and fauna. In the case of Cetinje Municipality this involves the city's hinterland including Lake Skadar and Lovćen massif. Although this is quite obvious, it is worth stating that everything needs to be done to preserve, conserve, protect, and enhance the natural capital of the lake and its surroundings, important part as it is of Cetinje municipality. We thus applaud the authorities in declaring the north-western zone of the lake a national park and pledge all the support we can give towards assisting them in defining and articulating the nature of the regulatory and legislative framework needed to ensure the park's viability and capacity to serve the interests of people living in and visiting the area.

There is now considerable evidence to assert that successful conservation policies, including those in national parks such as NP Lake Skadar, depend on the active involvement by those who live and work there. In the case of Skadar Lake, for example, neither local nor national authorities could – by themselves - expect to ensure the good environmental management needed to protect and enhance this cornerstone the municipality's natural (and cultural) capital. Equally, of course, the local residents need the active support of the local and national authorities.

Issues of the capital enhancement for tourism of national parks cannot be done without linking issues of conservation and preservation to day-to-day economic questions. Local 'stakeholders' are really shareholders of the capital asset of the park. This is why tourist economies in general, and the type of tourist economies that fit the 'cultural tourist' market niche in particular, need to be integrated with local economies in such a way that the latter are never subordinate to the former but, rather, are carefully planned extensions of them. Once again there is now a growing body of evidence concerning the best economic and social practice in national parks in Europe and elsewhere. It is a field of work that the European Commission is actively engaged with in some economies (in the Caribbean, for example) in which the economic importance of traditional agricultural products is declining in the face of rising significance of tourism. There are obvious parallels with the changing shape of the Montenegrin economy, including that of Cetinje itself.

The second aspect of tourist capital consists of urban settlements and their buildings – the built heritage of cities such as Cetinje. Clearly we are all familiar with the buildings in the city of local, national, and international renown: former embassies, the museums, and the library. Many observers would agree that one of the comparative advantages Cetinje has vis-à-vis some other towns in the country is that its built heritage remains a prominent feature of the city – unlike in some other cities in the region (and not only on the coast) in which architectural gems have either been physically demolished or surrounded by inappropriate contemporary buildings. In any future tourism development of Cetinje it is clearly vital, therefore, to place the historic core of the city within appropriately robust protective regimes whilst at the same time retaining the sense of scale, coherence, and grace of the town more widely. 'Cultural tourists' visit historic cities for their beauty and the care with which they are presented. We would emphasise that there is now a wealth of experience available in Europe in the management of historic cities for colleagues in Cetinje to call upon.

The third aspect of tourist capital consists of what we would term **cultural capital**. From Cetinje's point of view this clearly includes the objects (and associated explanatory texts) in museums, the collections of books and manuscripts in the Library, Montenegrin literature itself, writing by others about Montenegro (the subject of a very successful recent exhibition in the Library), regional literature, music, festivals, crafts and craft designs, work produced in the Academy of Art, exhibitions and all the other such materials that tourists presently come to see. In our view, however, these are all part of a much more extensive cultural landscape that consists of less obvious items of everyday cultural life – including story telling, modes of hospitality, cooking recipes, ways in which public space is used – *in fact ways of doing things in a very general sense*. The first chapter of this report addresses this realm more widely. The question for us is simply: how is the full range of Cetinje's cultural capital to be used effectively to enhance tourism to and around the city?

One category of the cultural capital of a tourist economy is its human capital. We have already made the point in our references to NP Lake Skadar. Broadly speaking, and as true of Cetinje municipality as of London or Paris, successful tourism economies are those that manage to mobilise the support and skills from a wide section of their populations. As we will emphasise throughout this report tourism economies generally depend on a much wider spread of social associations - from NGOs to local residents' associations, to unions, and to voluntary societies of many kinds - than any other industry.

2.1.3 MARKET

Like any industry, the success of any tourist industry depends on demand for the products and services being supplied at prices that customers are prepared to pay. Before knowing

whether Cetinje municipality can organise its products and services its authorities need to know the market. Chapter 4 of this report addresses who is likely to come to Cetinje and why.

In our view there are three fundamental and necessary conditions for a cultural tourism market in and around Cetinje municipality to work:

- The adoption of policies based upon the conservation (and thus appreciation) of the natural, cultural, and human capital of the municipality.
- The linking of the elements of the cultural tourism offer in the municipality and the recognition of who the 'cultural' tourists are, where they come from, and what they want.
- Acknowledgement that the cultural tourism market is fundamentally *regional* in shape. For Cetinje to prosper it needs to develop networks of relations in the wider region (including the countries of the Western Balkans and SE Europe).

2.1.4 PUBLIC AND PRIVATE SECTORS

The main purpose of the above brief comments has been to underline the obvious point that tourism is unlike other industries in that it depends on close co-operation between public and private sectors. If a private road is illegally built in a national park, for example, the capital value of the park is automatically diminished; if an inappropriate building is constructed that obscures the historic buildings of a city such as Cetinje, the capital value of the city itself is lessened.

To put it generally: as far as 'cultural tourism' is concerned, if private interests (typically through construction) come to dominate the public face of the natural or built landscape, the capital value of the tourist offer is automatically diminished.

This is why in the field of tourism in general, 'cultural tourism' in particular, the only way for the capital value of the tourism offer to be enhanced, for the competitive market place to be successfully mobilised, and for all the various benefits of the tourism industry to be realised, there needs to be a very close relationship between the private and public sectors.

2.2 RESPONSES BY MONTENEGRIN AUTHORITIES, UNDP, & GTZ

The above general principles are both uncontroversial and widely agreed. (This does not imply, however, that they do not need at every available opportunity to be stated, re-stated, and monitored for the degree to which they are actually implemented).

How, then, are these principles adopted and followed by the Montenegrin authorities and by the international agencies contributing to their work? How do they relate to the tourism economy in general and the 'cultural tourism' economy in particular? What added value may the work of the British Council bring? Part III of this chapter will address the last question. The next step is to look at the first two.

2.2.1 THE NATIONAL SPATIAL PLAN

The National Spatial Plan (NSP) is by far the most important legislative instrument in the country for future national and municipal spatial planning. The NSP aims to provide an

umbrella for the development and management of spaces (from roads to parks to mountains and lakes to historical cities such as Cetinje) throughout Montenegro.

A great deal of tourism development has already taken place (particularly on the coast) outside the framework of the NSP but it remains the intention of the authorities that tourism will eventually fall within the regulatory compass of the NSP and its local spatial plans.

The Plan was conceived and initiated in 2001 under the aegis of the then Ministry of Planning and Environment. It is now the responsibility of the Ministry of Economy. It went through Parliament in March 2008. The authorities are now at the stage of launching local spatial plans, including some that involve parts of Cetinje municipality.

The importance of these developments cannot be overstated. One of the main concerns of the NSP is the relationship between public and private sectors. From our point of view, and following on from the arguments outlined above, the tourist economy in general, the cultural tourism economy in Cetinje in particular, need(s) to be planned and implemented in relation to the national and local versions of the NSP. But we could imagine a cautionary tale. If, for example (and hypothetically), the NSP were to be driven by private interests (such as road building and/or coastal building development) it would certainly be to the detriment of the public interests of any sustainable tourism industry in the country and municipality.

One aspect of the NSP and its local versions is to address issues of illegal buildings: a key part of any local and national spatial policy. Clearly, however, observers would look towards the efficacy of implementing any legislative frameworks constructed by the Plan. Presently some building in the country as a whole, coastal and urban spaces in particular, seem to proceed without regard for building or spatial regulations of any kind. In NP Lake Skadar, for example, a private road has recently been constructed without permission from local authorities. All would agree that this is an example of the triumph of private interests over public interest in the natural assets of the park. The questions are: how was this allowed to happen? Could it happen again? If it could, then the integrated planning and management of the national park for the type of cultural tourism economy we are concerned with here would seem difficult if not impossible to implement.

There are various international agencies that have been involved in contributing to the work of the Montenegrin authorities in the area of the NSP. The most important amongst these is the UNDP. This agency has been involved in the Plan since 2004 and is presently engaged with the local spatial plans of 11 municipalities in North Montenegro including Cetinje. Secondly there is the *Deutsche Gesellschaft für Technische Zusammenarbeit* (GTZ): presently engaged in working with the Montenegro government on tourism planning in Cetinje municipality and producer of the excellent *Concept on Cross-Border Development*³. Thirdly, there are the Rockefeller Brothers from the USA. They are involved in supporting and encouraging local spatial planning, sustainable development, and peace building and work in a limited number of countries, including Montenegro.

2.2.2 LOCAL SPATIAL PLANS

The NSP is the national overarching framework for spatial planning in Montenegro. Local spatial plans will form the building blocks of the NSP and we will suggest a possible role for the British Council in the forthcoming location studies of Cetinje in part III of this chapter.

³ Written by Stefan Drager, Aledsandra Kikovic, and Schpetim Quku.

2.2.3 THE NATIONAL TOURISM ORGANISATION

Tourism planning and marketing in Montenegro is the responsibility of the National Tourism Organisation (NTO). Local tourist organisations carry forward the work of the NTO locally and are attached to municipalities. We describe some of the work of the Cetinje tourist organisation elsewhere.

How is the NTO carrying forward the aims of ‘cultural tourism’ in Montenegro? How does its work relate to that of the NSP? What are the implications for ‘cultural tourism’ in Cetinje?

It is now clear to all that (continuing) coastal tourism development has resulted in a huge weight of tourist numbers on the coast. This is a trend set to continue and become more acute. The NTO estimates that in the high season there are 10 times more tourists on the coast than local residents and that many coastal residents go elsewhere in the country for their own holidays.

The emphasis on coastal tourism development follows the original Montenegro Tourism Master Plan produced by the German organisation DEG. This Plan is presently being revised. Of particular interest to us is that it will include reference (not included in the original document) to the way in which the north and centre of the country can be used for tourism purposes. The Plan’s original author is leading the revision with the help of several institutions, including Land Use UK⁴. The UNDP has high opinion of this latter organisation and suggests the appropriateness of a Land Use UK/British Council link.

We understand that GTZ is waiting for the revised DEG Master Plan to be published before launching its own initiative in Cetinje region. The British Council’s own strategy, however, may be conducted and launched without further delay provided of course that it maintains its collegial communication with the GTZ, as well as the UNDP, and (centrally) the NTO itself – in addition to other interested parties in the tourism planning field.

But before the revised version of the Tourism Master Plan is published, the NTO has already taken some decisive steps to orientate is already itself to what we would like to term a ‘post-coast approach’ to tourism in Montenegro. We describe some of these here because we believe that any strategy suggested for Cetinje Municipality needs to be closely linked to the work of the NTO and its local counterpart.

The Strategy for cultural tourism in Cetinje needs to be integrated with the work of the NTO and the local TO. To this end we summarise 11 key aspects of the principles, practices, and initiatives undertaken directly or supported by the NTO.

- **Montenegro as a destination of precious natural and cultural heritage.**
Current brochures produced by the NTO include *Wilderness Biking Montenegro*; *Montenegro Obala*; *Explorer Montenegro*; *Culture NP Skadar*. From the evidence of these as well as policy statements from other quarters it is clear that the government’s tourist authorities are presenting the country as an ‘unspoilt’ landscape of precious natural and cultural heritage resources.
- **Hiking and Biking**
Amongst the NTO’s main initiatives in the promotion of Montenegro’s nature and culture is the *Hiking and Biking* initiative. Promoted nationally by the NTO, Hike/Bike is organised at local levels by local TOs, including Cetinje TO. Once again there is every reason for the British Council to link with the Cetinje TO to strengthen the

⁴ Directed by Peter Nelson.

capacity the scheme in the city and region. In comparison to comparable schemes in, say, France or Italy, there is some way to go for both Montenegro as a whole and Cetinje in particular to achieve anything like capacity in this field.

- **Tourism and Rural/Urban Development**

The NTO regards the type of nature tourism in rural areas of the country as well as some of the cultural tourism in urban settlements (and this would certainly apply to Cetinje) is part of wider *development initiatives*.

- **Micro-credit arrangements**

Tourism is, to repeat points made above, an unusual industry in many respects – not least that it depends to a great extent on small entrepreneurial actions: bed and breakfast accommodation, small scale agricultural production, craft and souvenir production, initiatives involving rural practices (from bee keeping to dry stone walling and all the skills associated with the preservation of historic buildings), and a host of others. Apart from being an integral part of the nature/culture tourist economy, many such activities thus need *micro-credit arrangements* in order for them to take off. Once again there is a growing body of literature that addresses how this can be made to work.

- **Domestic tourists**

One category of tourists often overlooked in the search for the (foreign) tourist dollar is *the domestic tourist*. However, in Cetinje's case the NTO reckons that many visitors to the city consist of those with relatives there. Additionally there is also a considerable domestic conference traffic using the Grand Hotel. The extent to which the British Council can usefully contribute to the domestic tourism sector should be discussed.

- **Tourism and Regionalism**

To complement domestic tourism, the NTO is rightly clear that the *cultural tourism market demands a regional approach*. Presently the NTO works with the GTZ's RDA initiative. The RDA flowed from discussions in August 2007 in Cologne that the NTO took part in with colleagues from Albania, Serbia, Croatia, and elsewhere in region to discuss bus travellers to the region from Germany. Such a regional approach is precisely in line with the British Council's own growing regionalism. Furthermore the present British Council strategy team has extensive experience for the EC in Bosnia and Herzegovina and elsewhere in the region. Clearly these synergies between the Montenegro NTO, GTZ, the EC, and the British Council may be advanced in a spirit of close co-operation. The NTO observes that regional initiatives would greatly benefit from the support of regional and international associations such as the UNDP.

- **Conception for Cross-Border Development: Lake Skadar**

As already noted above, one of the most impressive examples of the above regional approach is the GTZ's own *Conception for Cross-Border Development: Lake Skadar* and we will return to this document shortly.

- **Networking**

All regional tourism planning involves extensive *networking* (with destinations and sites, cities, institutions, in the EU and SEE area and beyond). We will also return to the implications of this for our own strategy shortly.

- **Tourism Education - Tourism and Education**

There are several initiatives organised and managed by the NTO in the specific field of *tourism education*. There is, for example, the Vocational Educational Training

(VET) Scheme: effectively a framework for university/student involvement in tourism development in Montenegro. We could imagine a UK university being interested in taking part in a VET: it could well be linked up with future work on cultural tourism. Then there are the 'study tours' organised by the NTO to provide opinion formers in various European countries with opportunity to witness Montenegro and its tourism offer. Clearly the British Council could link productively with such study trips. In doing so it could follow the example of a study group from Spain that is on the point of visiting Montenegro and has offered to write guide book in exchange for the trip: the British Council could well borrow from this original and innovative idea. As far as the education of those to be employed in the tourism industry is concerned the NTO's opinion is that whilst there is a superfluity of tourism management training, there is a lack of training in such areas of cultural and natural tourism as guiding, cartography, rural skills. This is another area of possible intervention from the British Council.

▪ **Tourism and Education: The Library, museums, and local schools**

Beyond the field of specifically tourism education the NTO places considerable emphasis on the fact that 'cultural tourism' is intimately associated with *education* in the widest senses and at all levels (from schools to universities to adult education). For the British Council a particularly attractive point of possible productive contribution to Cetinje would be in the field of *linking the work of the city's museums and Library with the work of local schools and higher education*. We will return to this below.

▪ **The Web**

The new NTO web portal is accessible at www.visit-montenegro.org and www.montenegro.travel and was opened publicly at the ITB in Berlin earlier in the month. Each town in Montenegro has a tourism development project and in theory all the facts about a town can be read off the portal – and bookings can be done through it. This is a natural area of co-operation between the British Council and Cetinje TO.

2.3 SOME PRELIMINARY CONCLUSIONS

The aims of parts I and II have been to set out the context of any cultural tourism economy, and briefly to summarise a selection of the responses to this context by the national tourism authorities (mainly the NTO) and their international partners such as the UNDP and GTZ.

The aim of the very short part III is to draw conclusions from all of the above for the strategic contributions of the cultural tourism economy in Cetinje and region. In doing we look forward to section 5 that sets out in summary detail the various emerging projects that constitute the strategy for cultural tourism. There are five points.

The first is that the British Council should find a way to co-operate with national and local authorities to contribute to the local spatial plan for Cetinje municipality.

Secondly, the British Council should support the NTO's VET scheme by finding ways to link one or more UK universities, through the NTO, with Cetinje's TO.

Thirdly, the British Council should set up a working group to complement the excellent work pioneered by GTZ in the field of regional tourism. Using the good offices of the EU, the UNDP, and the British Council itself this group should make and consolidate existing professional networks across the region – and into Europe and the UK – in the field of cultural tourism.

Fourthly, the British Council should hold discussions with the NTO and the local TO to mobilise UK support for the Hiking and Biking initiative.

Fifthly, the British Council should use its good offices and those of the NTO to organise a study tour by UK journalists and industry stakeholders to Cetinje and hinterland.

Sixthly, the British Council may offer advice on the development of the web portal.

Finally, and most significantly, the British Council should set up a working group/emerging project to support all types of educational work in the field of cultural tourism in the area.

*

In the final chapter of this report we will demonstrate how these summary conclusions may become the fully fledged elements of a comprehensive cultural tourism strategy.

CHAPTER 3

CETINJE: THE LOCAL CONTEXT & CULTURAL TOURISM OFFER

3.1 CETINJE - ITS ECONOMIC AND CULTURAL CONTEXT.

This chapter brings the view down to the micro level and considers the specific circumstances at play in Cetinje municipality today. Firstly we examine the events that have led to a renewed call for cultural tourism in Cetinje municipality to play a wider role in contributing to the local economy. Secondly, based on the extensive raft of information provided by local stakeholders during the two workshops organised in Cetinje and subsequently through further communications after those meetings, we consider what cultural assets around the municipality have already been placed in the cultural tourism 'offer'. But then drawing from the experiences of successful cultural tourism developments in other European cities, we outline additional tangible and intangible elements that enhance and add value to the core attractions already presented.

It is difficult to image at first, how a small picturesque town in the centre of Montenegro, rich in natural and cultural heritage is suffering in economic terms more dramatically than most municipalities in the country. Yet, the latest demographic studies show it to be the only area within coastal and central Montenegro to be leaking population. In the past 6 years or so as many as 6000 people have left the town, as graphically illustrated in **fig. 1**

The most significant reason for these losses is down to Cetinje's economic dependence on light industries principally established in the period of the SFR Yugoslavia. Thousands of jobs were tied in to the factories of 'Bojana' (a transportation enterprise), Kosuta (a shoe factory) and above all the extensive complex of Obod, makers of air-conditioners, washing machines and refrigerators. With markets closely tied to Serbia, and systems of production and management created for another form of political economy, all of the aforementioned businesses have bled jobs. Either through the direct consequences of war in the region, or the failure to adapt to free market economics, many thousands of jobs have been lost. Therefore, with little prospect of alternative work locally, people have migrated out of the municipality. For example, the company Obod, is now in the process of being privatised, but whatever happens to its ownership, it is most unlikely to offer the number of employment opportunities it provided in the past.

There is a sense on one level, that Cetinje is stagnating. There is also a general consensus that it would be completely unrealistic for tourism to make up the job numbers lost by other sectors. What a well-targeted and coherent cultural programme involving tourism could do, however, is to raise local, national, and international awareness of the status of the municipality and to present a more optimistic image when investors look at its future economic prospects.



Source: Census of Population, Households and Dwellings 2003, First Results. Podgorica 2003.

Figure 1: Growth & fall of population by municipalities, Montenegro

Part of Cetinje’s problem derives from the way that Montenegro’s ‘transitional’ economy operates. The lion’s share of investments currently find their way into the coast or Podgorica – via the capital. This is resulting in an investment isolation for Cetinje and other inland municipalities. In the case of Cetinje, this isolation may have some of its roots in the 15th century when the town was constructed in the first place as a seat for the feudal lords away from the centres of population. It was also a centre of resistance against the Ottomans and, in some ways, is still a centre of free-thinking and literary and other critical thought. Now, Cetinje finds itself economically and to a certain extent culturally and in other ways on a different track to those on the coast and in the capital.

An emphasis on a contemporary vision of ‘cultural tourism’, therefore, would amount not only to an economic initiative in one sector but also to a wider cultural one within Montenegro as a whole. There is a sense in which the history of the country – without question better represented and displayed in the Cetinje museums and libraries than anywhere else in Montenegro – needs recovering from the simpler nostrums of a free-for-all economic system that seems to operate outside any historical foundations. As pointed out by several participants in exchanges during the workshops organised by British Council for the construction of this strategy, one of the most achievable objectives should be for Cetinje to become a centre for school and other educational visits, on a consistent and much more expansive scale than anything that takes place at the moment.

Furthermore such an emphasis on *cultural* recovery, cultural tourism, and cultural creativity (expressed, for example, in the recovery of traditional artisanal skills and knowledge of design - and the mobilisation of these for use in the contemporary world) would be welcomed by the NTO – whose officers are aware of the fact that there is no national body concerned with cultural tourism.

3.2 CETINJE AND ITS CULTURAL TOURISM OFFER

It must be firmly stressed, that this strategy document represents a vision for the next phase of development in cultural tourism around Cetinje municipality, not the starting point. The current state of play, as indicated by statistics provided through the Cetinje tourism office, shows that the number of employees within the tourism sector (including cultural institutions such as the national museum) is around 700 full employed staff. Out of this number, 300 work in the culture department and 100 in art faculties in Cetinje. As for tourist arrivals, the town and its surrounding villages and countryside are visited by around 140,000 each year. Guests enter the municipality mainly as extensions of trips to the Montenegrin coast and Dubrovnik.

The methods by which data is collected, mean that the figures shown above are at present not precise. Furthermore, up until now it has not been possible to construct an accurate picture of tourists' nationalities. Anecdotally, it is certain that several tens of thousands of Serbian tourists are included in this figure of 140,000. The majority of these arriving in organised groups, often on school and other educational excursions.

However, the problem of understanding the fuller composition of tourist arrivals, is being partially redressed through the introduction of a 'picnicker's tax'. Starting from this year, when paying the tax, visitors will have to declare their country of origin. Some early figures, provided through the official records of the national museum and the National Park Lovćen on the sold tickets in the last year, show the following gross arrival numbers:

King Nikola I Castle	84.683
Art Museum	11.492
Biljarda.....	10.574
Historic Museum.....	10.353
Relief.....	8.190
Ethnographic Museum.....	5.313

The National Park Lovćen itself, was visited by 30,000 picnickers (according to the number of sold tickets in the National Park)

When looking at the number of nights tourists spent in Cetinje in the last year, the overall figure is just 26,789. Out of that, 21,924 nights were spent in the Hotel Grand (10,372 domestic and 11, 552 foreign guests), and the rest was made in the National park Lovćen (Resort and Bungalows). This in itself highlights one of the major concerns of the local tourism community, and that is how so few of the overall tourist arrivals actually stay on overnight in the municipality.

Part of the problem is the paucity of accommodation options for visitors to the region. According to the results found on the NTO webpages for Cetinje (www.montenegro.travel), there are four possibilities for accommodation across the whole of Cetinje municipality (see fig.2 below);

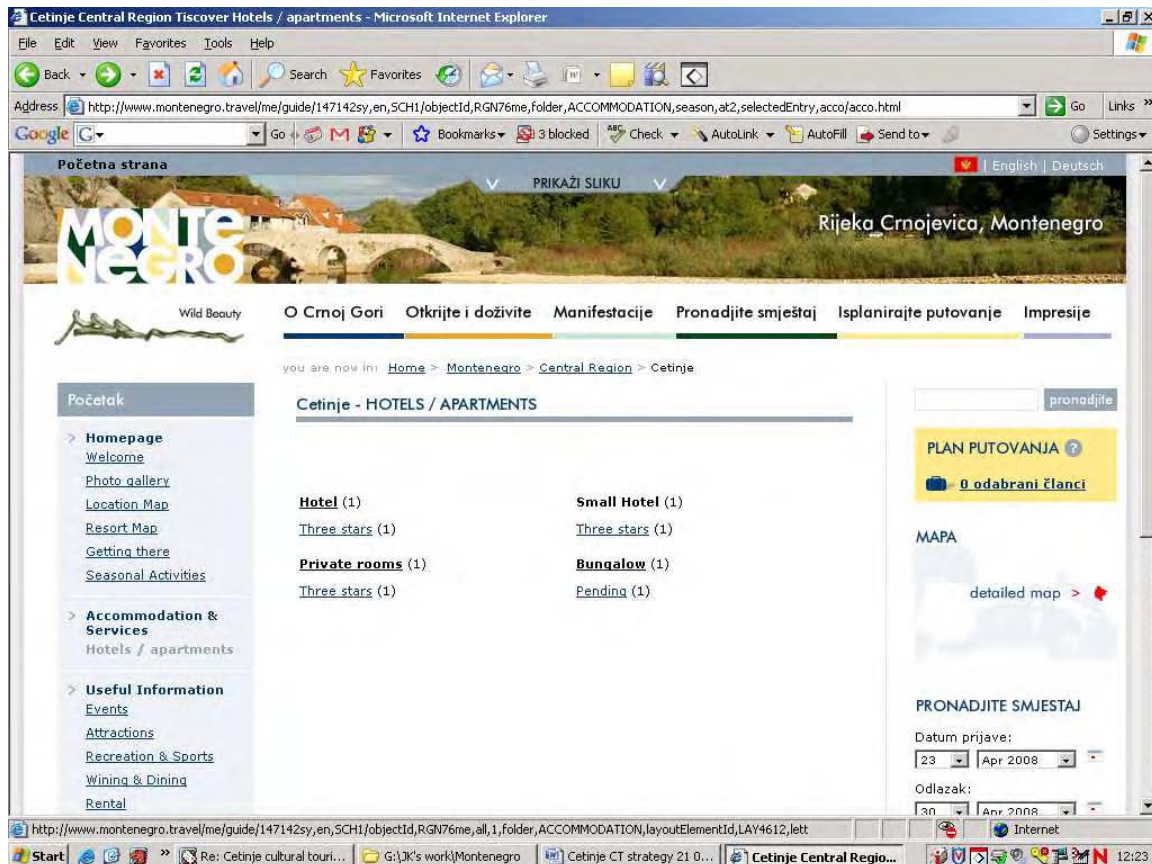


Figure 2: Screen capture from montenegro.travel

When checking www.visit-montenegro.com, however, the narrative also listed the hotel complex of rooms and bungalows around Ivanova Korita, but didn't provide further contact or location details.

When looking for private or B&B style accommodation, it was limited to one listing for the Cetinje region in www.montenegro.travel. During the workshop meeting in December 2007, it was indicated that more rooms were available across the municipality. Subsequently the Cetinje tourism office indicated that the summary of accommodation capacities is as follows:

- Hotel Grand 370 beds
- Hotel at Ivanova Korita 30 beds
- Bungalows as a part of the Lovcen-Becici resort in the Lovcen National Park - 5 bungalows with a maximum of 4 people per bungalow
- Private boarding houses - 22 each with 5 beds

It is therefore quite apparent that there is a need for a fuller and more consistent set of accommodation listings to be made available across the websites and other access points, that potential tourists may look at when planning their holiday. Furthermore, having viewed much of the accommodation on offer, the overall impression is that as they currently stand, the style, décor and presentation of rooms is suitable for a limited range of guests, principally those coming from domestic markets. When thinking about the tastes of cultural tourists coming from many of the Western source markets, then further investment for alterations to existing rooms, or the introduction of new accommodation is necessary.

But accommodation is only one element when considering, what contributors throughout both of the workshops connected to the drafting of this strategy, indicated as being the core

problem - simply how to attract more tourists to stop considerably longer than the few hours they are currently staying in the area, and to leave considerably more of their spend in the local economy. When looking more closely at this issue, an important step is to present a baseline audit of what objects are considered to be the cultural tourism offer.

WHAT'S ON OFFER FOR THE CULTURAL TOURIST?

This section is constructed thanks primarily to a compilation of information presented by the Cetinje tourism office, the National Tourism Organisation, the National Museum and the National Library, alongside opinions gathered during the two workshops and subsequent visit to Cetinje.

3.2.1 RELIGIOUS SITES

In terms of a purely legal framework, laws officially protect 55 historical monuments that lie within the borders of Cetinje's Municipality. Of those monuments, 20 are sites of worship (both orthodox and catholic) located in the town and neighbouring villages. Considering their historical or architectural significance, the buildings of greatest interest are; the orthodox bishopric of Cetinje (the Monastery); Vlaska church (near the Cetinje's central square); St Anthony's of Padua church (catholic); and Cipur (the church of the former Montenegrin royal family). Outside of Cetinje town, there are a couple of churches situated in the village of Njegusi which can be also included in this list, together with Njegos's Mausoleum on mount Lovćen.

Within Cetinje there are also three relics of some significance to Orthodox pilgrims or visitors interested in religious artefacts. Now housed in the Cetinje Monastery, a part of the hand of Saint John the Baptist, along with a piece of the True Cross (piece of the cross on which Christ was crucified) may be viewed. Whilst the National Museum in Cetinje, since 1978 has held the Icon known as the Lady of Philermé. The great journeys that eventually brought these objects to Cetinje, connects the town with many countries such as Malta, Serbia and Russia.

When the relics were recently exhibited in Moscow, visitors came in significant numbers to queue up and catch a glimpse of the treasures. This does suggest that there is an as yet untapped market for visitors from Russia in particular to come and view the relics in situ at the permanent resting places in Cetinje. Not only does Russia have a historical link with the artefacts, but additionally a considerable number of Russian holidaymakers are already coming to Montenegro and others are investing in properties along the coastline. Therefore, with some astute promotion and wider information, there may already be a captive audience willing to come up to Cetinje from the coast. Furthermore, on a more regional level, the relics could also be an attraction to Orthodox Christians from Greece, Serbia and the Republika Srpska entity of Bosnia-Herzegovina.

3.2.2 THE FIVE STRANDS OF THE NATIONAL MUSEUM

Housed in some of the most impressive and well kept historical buildings in Cetinje, the five branches or departments of The National Museum of Montenegro form one of the major tourism attractions in the municipality. This complex institution consists of: King Nikola's Museum; the Art Museum and the Historical Museum (which are housed in Vlatin Dom or the Government House); the Ethnographic Museum and the Memorial Museum of Petar II Petrović Njegoš (also known as the Biljarda). Each one covers different aspects of the local historical evolution (cultural, spiritual, political), and nearly all of the locally important historical periods are well covered by the existing presentations (from Palaeolithic up to the present time). A comprehensive web site, www.mnmuseum.org has been constructed to help explain and introduce the five departments of the museum in both Montenegrin and English. The site was optimised for Internet Explorer and Netscape Navigator, which means that it is not presently accessible to Apple Macintosh computer users who normally browse the internet using Safari or Firefox. During the past 40 years the Museum has also

developed a stable source of income based on tourism and a range of services in English, French, Italian, Russian and other languages. Nonetheless, income coming in to the museum through tourism is still not sufficient to cover all the needs of the institution, even during the “good” years in the past when more than 200.000 visitors a year came through the museum doors.

This demonstrates that the museum is successful only to a certain degree in transforming visitation into income generation, and attracting greater numbers to the sites. Like most of the attractions in Cetinje, the museums currently depend to a large extent on tourist agencies (all of which are associated with hotels) in Kotor, Budvar, and other coastal resorts, to bring visitors to them. This means that visitors arrive from the coast by coach, have a look around for a limited period, and then go away again. The net effect of this process, is that the stay is dictated by an agenda set from the agency and the hotel on the coast. Most of the profit thus remains with them, with little financial gain resting in Cetinje itself.

On several occasions during the workshops that contributed to this strategy, it was suggested that one way forward might be if a more pro-active stance was adopted. With some more direct marketing policies the museums and other sites in Cetinje could attract their ‘own’ visitors. This would mean that the duration of stay and spend by the tourists would be much more dependent on how attractive the sites were presented and the range of opportunities tourists were given to spend some money locally. Hence, a direct marketing campaign would only be one feature. The actual motivations and expectations of guests arriving directly, possibly from different source markets, means that a considerable amount of further research needs to be conducted. This would enable the relevant authorities to assess if the museums as they stand are sufficiently attractively laid out. If the style of presentation is that which the tourists are used to in their home countries. Information would also be needed to understand if the facilities were easy enough to find and whether there were clear opportunities for the tourists to spend money both within the museums and around the town in general.

The strategy will suggest more directly in chapter 5, some possible ways of fulfilling such research and how the profile of that information could be structured.

3.2.3 THE NATIONAL LIBRARY

Another key asset of great stature is the National Library. Housed in two historical buildings, one the former Italian legation and the other the French legation, they are both property of the National Library. The Library is a ‘centre’ of Cetinje’s and Montenegro’s cultural heritage. Following its recent exhibition in 2007 of books written about the region and country by northern Europeans, a new exhibition is presently being prepared on the world of the Istvani’s; ‘outsiders’ **(KN to liaise with Jelena to check the cultural significance of this)**. On a medium to longer term time frame there is also potential for an exhibition about Cyrillic Printing. The first Cyrillic printing press was in Cracow (around 1490), the second in Cetinje (1492-1494), and the third in Russia. Observing that the Cetinje press was set up under Ottoman rule. The setting up of the press, is often viewed as being a bold move by the local people at that time. Unfortunately, there are no remains of the original press, but drawings and manuscripts are available enabling replicas to be made of the Wurtenbourg presses of which the Cetinje press was an example.

Inspirations for exhibitions with local and regional significance are in fact multi-fold. For example given that Ivo Andric died nearby in Herzeg Novi, it is a logical step to use this link as an opportunity to mount an exhibition in his honour. Also a link would be possible/desirable with his place of birth, Travnik in neighbouring Bosnia-Herzegovina. Indeed, there are obvious prospects of an Ivo Andric tour, tying in amongst other locations

with Visegrad, the setting of Andric's best known novel, *The bridge on the Drina* and recently inscribed in the world heritage list.

Other opportunities could be made of the collection of photographs taken by Princess Ksenija, the first Montenegrin photographer who also came from Cetinje. The idea of a photographic exhibition calls to mind the fact that there are other photographers in Cetinje and region – for example Andrija Kasom, whose Montenegrin landscape and erotic photographs have been awarded international prizes.

All in all, the Library is one of the great repositories of Montenegrin literature and cultural history. It's national and international importance was signalled recently by the donation by the Japanese government to the Library of €66,000 for the digitalisation of the collection.

The relevance of all this for the strategy work is at least threefold: (a) national and international donors could help to encourage and facilitate closer connections between the local and nationwide schools and the Library (b) Such an initiative would overlap and blend very effectively with bringing the Library into the centre of the cultural tourism offer of Cetinje – through, for example, the encouragement of the kind of exhibitions mentioned here. Moreover the links between the Library, the ethnographic museum, researches on oral history and photography, local and regional literature, seem clearly suggested (c) the Library and its director are keen to become part of a regional cultural collective of Libraries. The connection with Cetinje and other major libraries such as the 'Vjecnica' in Sarajevo is a 'natural' here – for many reasons in addition to tourist related ones.

Again, more specific 'next steps' in regard to linking up the library with other local, national and regional institutions, are mapped out in Chapter 5 of this strategy.

3.2.4 NATIONAL PARKS & NATURAL HERITAGE

As explained in Chapter 1 of this document, the niches of eco-tourism and cultural tourism often find themselves in a close almost symbiotic relationship and this is no different in Cetinje. Whereas the population across the municipality is overwhelmingly urban (over 15,000 out of a total population of just more than 18,000), the cultural links to villages such as Njegusi, areas of rural food production and in Cetinje's case the close proximity of two national parks, means that it is most appropriate to merge or make a link between the natural and the cultural sights. Such a link would also tally with the considerable work already done on formulating a 'hiking and biking' approach to tourism in areas set back from the coast. Thus Cetinje town should be well placed to be presented as a stimulating 'resting point' for both hikers and bikers attracted to the national parks and stunning rural scenery across the municipality. It should also be pointed out that Cetinje town is the centre for other specialist interest clubs and groups such as the speleological association and mountaineering society.

The two national parks in the region are the mountainous Lovcen NP and the wetlands centre of Skadar Lake NP. The geographic relationship means that Cetinje municipality acts as a so called natural "bridge" between the lake and the mountains. Furthermore, within the national parks various cultural 'assets' are directly located. The most important of these being the mausoleum in NP Lovcen to Petar Petrovic Njegos, hero/ruler of independent Montenegro and also considered by many as the greatest national poet. The mausoleum located at Jezerski vrh, was designed in Viennese Secessionist style by the world famous Croatian sculptor Ivan Meštrović, but the story behind this structure is complex and highly contentious.

One of the complexities when attempting to construct this nature/culture 'bridge', however, is that the national parks are a state institution managed from Podgorica, even though some of

the territory lies inside Cetinje. Whilst the remaining countryside is managed by the local municipality in Cetinje. This means the feeling locally is that “the parks in question are pretty out of the range of the local authorities”. Hence, it is crucial when considering any strategic decisions that all stakeholders have to sit together and ensure the two forces are not pulling in the opposite direction from each other.

A final word in this section should be kept for Lipska Pećina, a karst derived cave located close to Dobrsko selo. At nearly 3 and half kilometres in total length, from 1905-1955 the system was opened as a show cave. Caves across Europe are significant tourist attractions that are commonly presented with the industrial and cultural heritage of the regions they are located in. Therefore, Lipska and other caves in the region definitely have a touristic potential which could be managed from Cetinje.

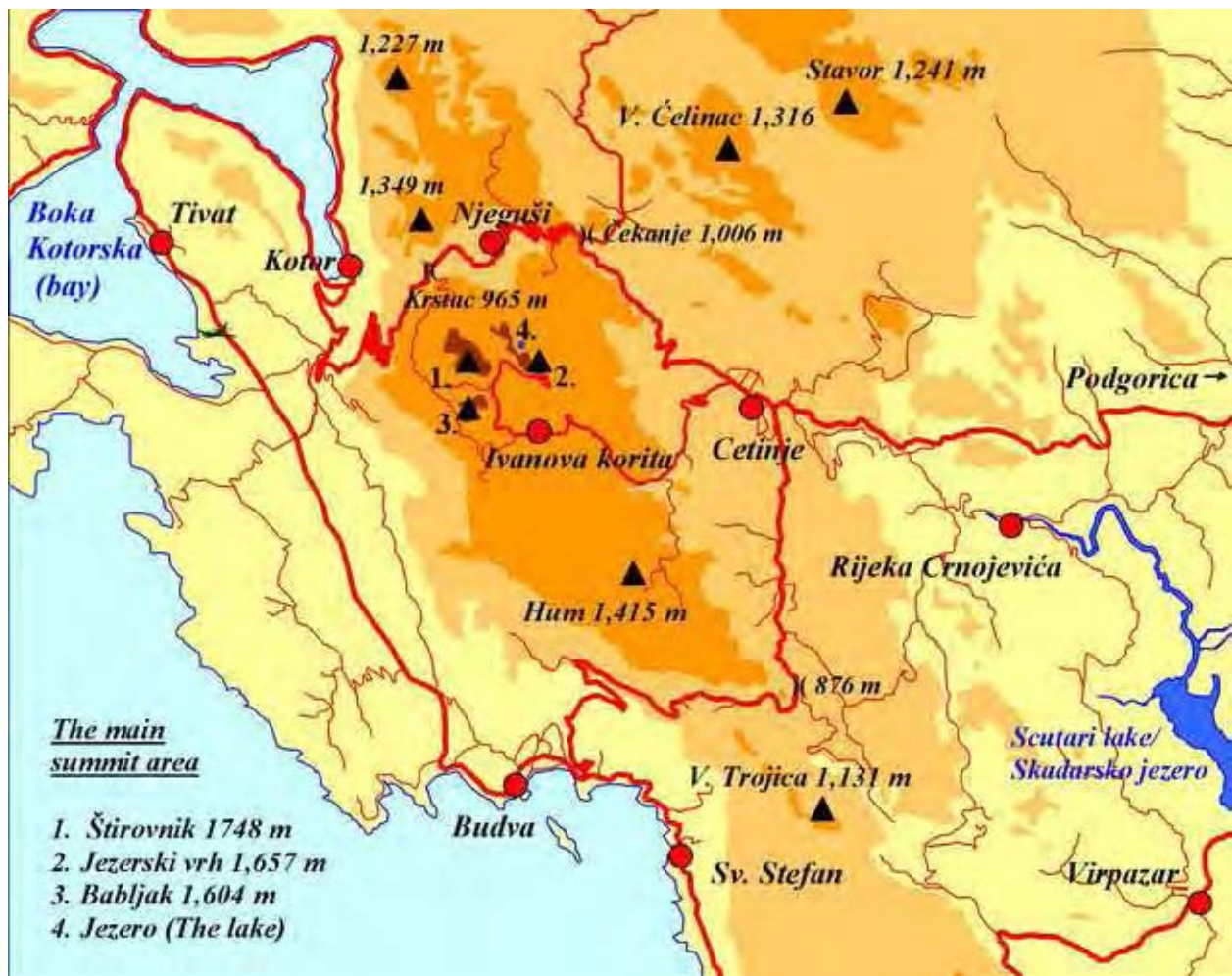


Figure 3: Map showing Cetinje as link between Skadar Lake NP & Lovcen Mountain NP

3.2.5 RURAL HERITAGE INCLUDING FOOD & DRINK PRODUCTION

As introduced in the previous section, some of the villages in the municipality have the potential to highlight the rural culture that has fed in to the market town on Cetinje. However, they too have suffered a loss in population like the town itself and are in need of attention and investment. The village of Rijeka Crnojevića is a clear example, once it was an important commercial centre of “Old Montenegro” and the birth place of the first typography

in the Balkans. Today, the rural traditions are extremely difficult to find as the remaining population have lost contact with the practices their ancestors made a living by, such the domestic production of textiles. Today there are just a couple of manufactures in Montenegro capable of reproducing the traditional handcraft techniques, and they are both situated away from Cetinje.

This does not mean that the entire situation is irretrievable though. Similar struggles were faced by rural producers of local foods. The municipality of Cetinje was for a long time well known for its cured and dried hams, domestic cheeses and in the south-east close to Skadar Lake wine was also produced. With new free-market conditions, though, small producers began to suffer and find it difficult to turn in profits and find suitable markets. As a consequence donors have stepped in to help turn the situation around. In particular GTZ has worked in and around Njegosi village to assist small producers find a way of supplying local butchers and grocers in Cetinje. This has helped make food in Cetinje a major selling point for visitors, who have numerous opportunities to sample local organic products both in shops and restaurants across the town.

Also within the territory of Cetinje, by the side of Skadar Lake is a wine producing area with vineyards, wineries, and wine cellars. This area has already been linked into a promotion for the 'wine routes' of Montenegro. However, further potential can be achieved, as there are natural links to be made between the cheese and ham producing regions and those focusing on wine – these almost overlap with the mountain and the lakeside national park areas. As well as exchanges between producers, so that the wine cellars can also offer local cheeses and the local cheese makers have a ready stock of lakeside wines, the opportunity to extend short routes into more regional ones and in turn introduce those routes to the 'hikers and bikers' surely offers the chance of presenting a more rounded and joined up offer. This has in a virtual sense been done with the NTO brochure 'Montenegro Wine and Dine', but there is further scope to make that connection more tangible on the ground with further signage, interpretations, maps, exchanges between businesses, and promotion particularly through the Cetinje tourism office. There are further assets already on the ground to tie in with such an approach, in the form of 10 café bars, 2 pubs, 3 pastry shops, 21 restaurant, 1 fast food, 1 wine bar, all in the surroundings of the town, or in nearby Rijeka Crnojevica, Njegusi and Lovcen.

3.2.6 SOUVENIRS

Appropriate and locally crafted souvenirs form another aspect of the cultural tourism offer that contributes towards creating an overall cultural experience and also helps keep income generated within the local economy. In Cetinje two local manufactures have engaged in the production of souvenirs, one is situated in the National Museum and the other at the Academy of the Fine Arts. Neither are currently reaching their maximum potential in terms of designs and numbers. The manufacture that works for the museum's souvenir shops produces just a limited number of a certain type of copies of the museum's objects. The other centred around the Academy of Fine Arts started production in 2006, following part finance by USAid through the American foundation International Relief and Development (IRD). Up until now though, the local view of this project and the souvenirs produced is not too positive. The potential does remain however, as new ceramic kilns, wheels and other equipment were purchased and remain in working order. In terms of sales points, there are two souvenir shops that operate throughout the year. One is inside the National Museum of Montenegro in the King Nikola I Castle and there is another souvenir shop at the local tourist organisation information point. Other producers and souvenir sellers use the summer season to offer their products at temporary locations, which are assigned by the municipal body.

As with many points of the tourism product, the production of souvenirs could certainly benefit from a greater sharing of information, needs and ideas across the various effected stakeholders. Far too often individual projects or initiatives seem to proceed in isolation and achieve limited success. When ideas are linked into wider chains and networks, however, they stand a far better chance of offering their full potential.

3.2.7 SIGNAGE AND INTERPRETATION

At the present time there a limited number of information points in the municipality. One is already in operation as the tourist info point in the centre of Cetinje town, whilst two more are planned to be placed in the coming period in Rijeka Crnojevica and at Lovcen NP. In order to capture further possible entry points to the municipality, it would be recommended to consider an appropriate site for another one in the vicinity of Skadar Lake as well. That way there would be a connection with tourist flows through the National Park there and also the aforementioned 'wine route' close to the lake.

Another initiative relating to interpretation of sites, is part of the Ministry of Tourism and National Tourist Organisation's project by which they are setting up digital information points all across Montenegro. Three are being provided for Cetinje and shall be set up in the coming months. They form part of an initial project phase to assist with of the provision of tourist signage. These '3D boards' are intended to provide maps of the town with listed monuments of culture and attractions which can be seen. They will be providing information in both English and Montenegrin. Hopefully, by being digital this will allow the boards to be updated when new information needs inputting.

These activities show that thought is being put in to provide Cetinje and the wider region with the necessary signage and interpretation to help tourists navigate and understand their way around the cultural landscape. Another useful resource is the 3D map of the principle built heritage sites found in Cetinje town (see fig. 4). The map is available on-line in several websites. However, some of those only offer the figure in low resolution. Additionally, it would help if the street names were visible on the map, so when printed off it would provide another effective navigation tool. Another recommendation would be to seek feedback from tourists, particularly if they are from new source markets and attracted by different niches. That way the authorities should more consistently know that the information they are attempting to pass on is clearly indicated, and providing the kind of service that is expected by the these tourists. An alternative action might be to run market research on such interpretation (using foreign guests in the trials) to see if they work as anticipated, before they are actually printed off or posted up on websites and information points.

Tourist guides are another important contributor to the interpretation of sites. Although some tour guides already operate around Cetinje, there is certainly a need to update their skills, both in terms of presentation and also the breadth of knowledge required to provide a wider introduction to the cultural offer. If it is hoped for greater numbers of tourists to arrive, then the corollary is that more tour guides will be needed. The training of cultural tourism guides should therefore, be interlinked with the other initiatives that are being considered at this time so that a full and professional service is provided.

The important point here is that efforts in the cultural tourism field – and the cultural field more generally – would be interpreted nationally as being in line with the spirit of the initiatives being presently undertaken by the NTO and other national bodies.



Figure 4: Main sites of built heritage in Cetinje

3.3 INTANGIBLE HERITAGE AROUND CETINJE

The figure above provides a useful representation of the cultural heritage that one might describe as the 'A-list', those assets that are thought of straight away by people working around the tourism industry. They are based around built heritage and 'high' cultural institutions that have long been woven into a tourism offer. However, the contemporary interpretation of cultural tourism consists of many more features than just that 'A-list'. The American author, storyteller, humorist, columnist, musician, satirist, and radio personality, Garrison Keillor, described the situation to the 1995 White House conference on travel and tourism:

"We need to think about cultural tourism because really there is no other kind of tourism. It's what tourism is...People don't come to America for our airports, people don't come to America for our hotels, or the recreation facilities....They come for our culture: high culture, low culture, middle culture, right, left, real or imagined -- they come here to see America."

This correctly indicates that those who form the niche of cultural tourism are looking for much more than what can be viewed just in the built heritage. Contemporary tourists, certainly if you are talking about the UK market, are not simply seeking a flat history lesson. They want to be inspired by the sounds, the stories, the tastes, the whole experience of coming to a different culture such as that in Montenegro and Cetinje. In many cases they want to have the opportunity of finding out things for themselves rather than being shunted around in coaches and lectured to. This means that many other features of what we call the 'intangible heritage' can be placed within the offer and used to create a more complete form of cultural tourism, which adds interest and value to the existing product.

These aspects of intangible heritage already exist as well and don't cost a huge amount to be woven in to the package on offer to tourists. As an example, part of Skadar Lake lies within the territory of Cetinje. There is an extensive oral history based around fishing on the lake. That history; its contribution to the economy of the fishing villages; the techniques of salting, drying, preserving fish; local recipes – with potential for these to be available in lakeside restaurants, all can be presented so that the visitor gets a clearer picture of the everyday culture of local residents.

Another example might be the history and social contexts of the *kucicas* (guard houses) of which there are 18 on the lake. There is also the potential to use these for aspects of tourism hike/bike activities. Or water mills. Several installations of water mills exist on the lakeside, including those at Poseljane. These could be restored by local specialists with local skills and set up in some way for visitors to view them and learn about their operation. These things might even seem uninteresting to nationals considering what to present to the tourist. But it must be remembered that all of the above are different and new to someone coming say, from a large European city where such experiences would not happen on a regular basis.

Then there are other traditional skills and crafts, such as bee keeping. For instance there are hives at Prerlaka that are traditionally associated with such products as beeswax candles, honey and mead wine. Or basket weaving: there is one well-known basket weaver from Dodosi village named Pavle Vukotic, who is still producing baskets, bottle covers, and so on. But it is clear that these skills will disappear unless they are caught

now. What is required is firstly for training and transfer to be provided, so that the skills can in some way be incorporated into the tourism offer.

Secondly, there has to be a wider appreciation about how these practices contribute to the broadening out of the cultural tourism on view. It is important in other words to present the cultural fabric that is wrapped around the built heritage. This includes high cultural expressions, but also vernacular and contemporary expressions that show the town and municipality are alive and active today and not simply an unchanging 'open museum'. One very good local example of this is in the work of the Cetinje group, the Books of Knjige (www.thebooksofknjige.com). Registered as an NGO, performing music, comedy and a weekly local radio show, this group offers an alternative perspective on local culture. With a contemporary view on issues and events, guests mostly from the arts are introduced in their shows and often mercilessly satirised. Such material provides another way of showing what is on offer culturally in Cetinje today. It also shows that culture is not a static process and is most dynamic when differing expressions are allowed to present themselves. In tourism terms, groups such as the Books, could contribute to the cultural attraction of Cetinje through their own performances or by way of exchanges or collaborations with other national and international artists.

We will expand upon opportunities linking in with the intangible heritage of Cetinje in chapter 5 and the proposed working groups mentioned in that section.

Summary of Offer

The above accounts speak for themselves. In one sentence what we have is tourist 'capital' consisting of natural sites laden with social, historical, cultural and religious symbolism and significance.

CHAPTER 4

WHAT THE TRAVEL MARKET WANTS & HOW IT'S GOING TO GET IT!

When dealing with a 'new' tourism destination it's normal to start at the bottom and work up. The bottom rungs of this ladder are difficult to climb on to and involve substantial investment in time and money before the destination becomes known to the travelling public. Looking at Montenegro as a tourism destination though we have to start, not at the bottom of the ladder but near the top for, as we have already seen, Montenegro, with its small, but fast growing, tourism economy is already cited by the World Travel and Tourism Council (WTTC) as top of the league in tourism growth.

In fact it's worth reminding ourselves that according to the WTTC, in its annual statistics issued at the ITB travel fair in Berlin in March 2008, Montenegro was ranked as number one for percentage growth in tourism, outpacing such major players as China and India.

Listed by rate of growth the country has consistently appeared in the top three positions over the recent years consolidating growth year on year. Its strong foothold in terms of performance is underscored by a sustained expansion in travel & tourism as a result of focused strategic development and targeted investment.

BUT. It's just that phenomenal growth which presents the problem. The growth is centered almost entirely on the coast offering Montenegro a short term benefit but a long term problem of sustainability. Montenegrin Tourism Minister Pedrag Nenezic, quoted in a trade paper some weeks ago, confirmed that the country's major markets came from regions such as mid-west and northern Europe including Germany, Scandinavia, France, Austria, northern Italy and the UK. Added to this came the newer markets of Central Europe and Russia with, now, Americans appearing in small numbers. The drawback though is that much of this new market was headed only to one place and that was the coast offering, as it does, a short flight time of two or three hours or so from the snows of Moscow.

It's interesting to note that the Minister mentioned in his interview specifically the attractions of the whole country – not just the coast – including the diverse tourism offer of Montenegro with 'the climate, the mountains, the people, the culture etc. We put together all the elements to secure a kind of experience that delivers the 'wild beauty' of Europe, which Montenegro definitely is, aside from being a new nation, or rather a 'restored' country (as we used to be a kingdom until the beginning of World War I). In trying to create a story about Montenegro, we seek to make more people become satisfied with our invitation.'

4.1 THE MARKET

WITHIN EUROPE THE HOLIDAY MARKET IS CHANGING: -

For some years now there has been a move away from the traditional one or two weeks holiday taken in the summer and going from Saturday to Saturday. Although families are limited to school holidays much of the independent market is either single or has grown up children (empty nesters) who are both rich in time and in cash. Don't though believe that this market spends without limit – in fact the opposite applies as they use their time to search for good value. Market researchers say that travellers are looking for their

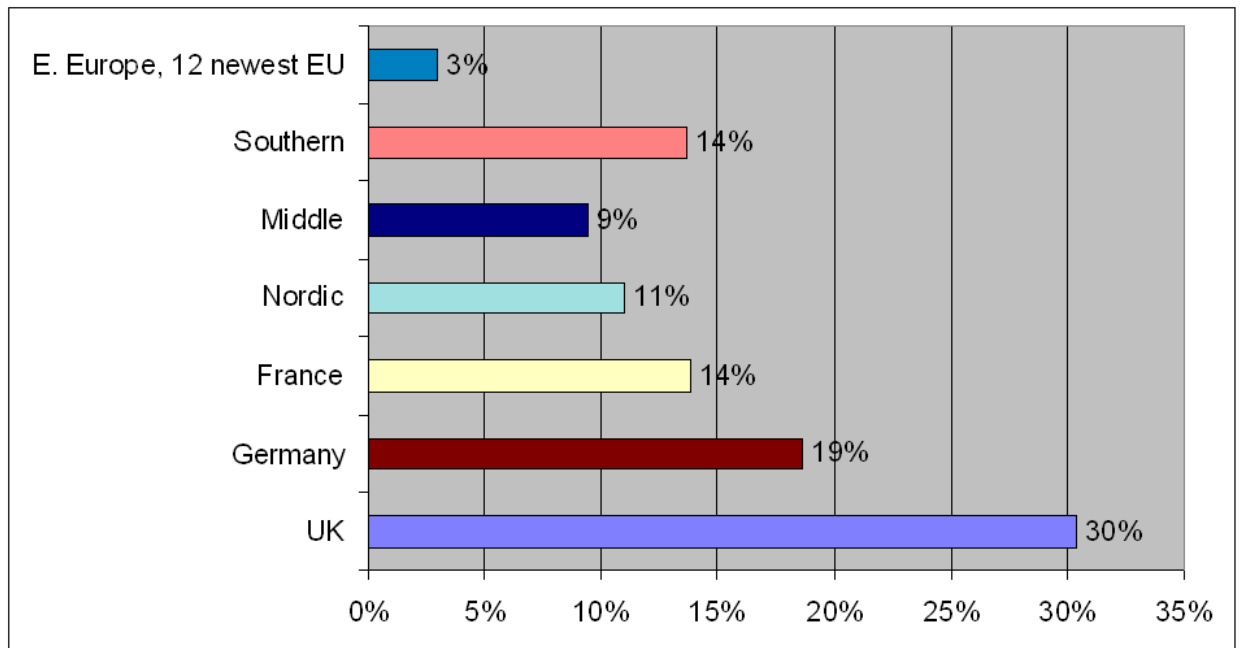
‘golden moment’ which – for the sake of this report – would be an experience which could only be achieved in Montenegro. It’s the ‘golden moment’ which is vital for spreading the word about the lesser known parts of Montenegro and which is vital for obtaining the all important repeat business. Although knowledge of a destination was traditionally broadcast through advertising the new – independent – traveller gets their information from the media, the web and, surprisingly, via word of mouth.

The traditional ‘package holiday’ is not dead but it is receding in importance with internet sales projected to reach over 25% of the European market by 2009.

Trends in overall online travel market size - Europe 1998 - 2007 with projections to 2009

Europe	Market	Internet sales	Internet sales	Internet sales
Year	(billion E.)	(billion E)	in % of market	increase %
1998	200	0.2	0.1%	N.A.
1999	212	0.8	0.4%	257%
2000	227	2.5	1.1%	216%
2001	223	5.0	2.3%	99%
2002	221	8.9	4.0%	77%
2003	215	13.9	6.5%	56%
2004	220	20.8	9.5%	50%
2005	235	30.2	12.9%	45%
2006	247	39.7	16.1%	31%
2007	254	49.4	19.4%	24%
2008	260	58.4	22.5%	18%
2009	266	69.9	25.2%	15%

Take the UK market as an example. For over five years the ‘independent’ market, which books a large number of the constituent part of a holiday (hotel, air flight, car hire etc.) itself outgrew the traditional package holiday in the UK. Yield in the independent market is hundreds of percent higher than on a package holiday. In 2007 for example the British made over 37 million visits abroad and of the leisure element of this more than 55% of trips were booked independently. In fact the UK was market leader in web based sales and, when added to Germany took nearly 50% of the total market for the whole of Europe.



Source: Carl H. Marcussen, Centre for Regional and Tourism Research, www.crt.dk/trends, 28 Jan. 2008.

Figure 5: Geographic status for European online travel Market 2007 (€ 49.4 bn)

This developing independent market now books its travel on the web. The traditional travel agent is a dying breed – they just aren’t good enough or informed enough. The traditional holiday was booked from an expensive brochure which came out in December i.e. six months before travel. With the use of the web that time is being reduced to a few days. The result – the web is not just a point of information – its must be a point of booking and payment as well otherwise it’s of little use.

Web use is no longer limited to young teenagers playing games. The largest growth in web use in Europe is in the over 60’s and computer penetration of households in Germany, France, UK, Netherlands, Scandinavia etc. is now over 70%. Broadband penetration which is vital in selling travel is now approaching the same level and with home entertainment and television being now combined with the computer I expect that 99% of the possible Western European market for Montenegrin tourism will have total access to a fast web connection within a very few years.

4.2 THE TRAVELLER OR HOLIDAYMAKER

The holiday maker is increasingly affluent, takes more holidays per year – may be four or five – and is no longer buying in fixed one or two weeks – neither do they limit these holidays to the traditional spring or summer. In certain markets payment of large bonuses or tax refunds increase the sums available for leisure spend.

The holidaymaker is increasingly not a tourist – which I define as someone behind the window of a coach – uninterested, uncaring and uneducated. The new traveller is

someone who is in the market for something different, which he/she can touch or smell and which is adventurous or educational.

This new European holidaymaker is also robust. They are not put off by politics or minor acts of terrorism - in fact they are interested in politics, in religion, in the way people live – they do not want to spend their holiday experience in some bubble which means they don't have to communicate with the outside world. They will however change their holiday habits if necessary so they want to eat healthily and locally – not the international buffet – and they don't want to suffer the bad effects of the 'fly and flop' as they want to get up off the beach and do something. Increasingly they come from a health conscious society which, for instance, sees sun bathing as unhealthy.

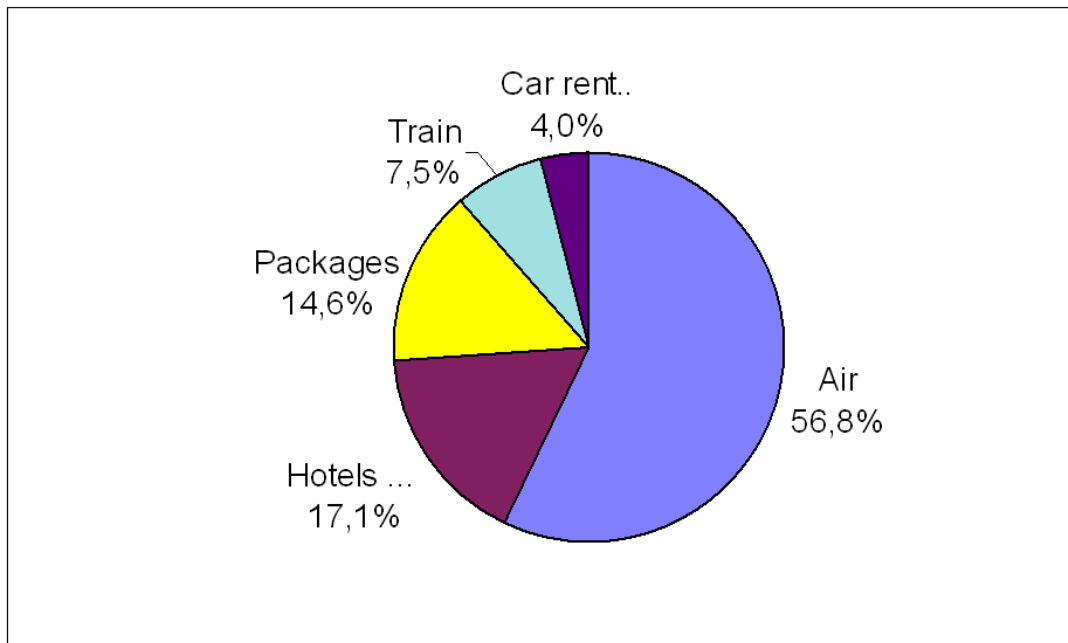
One must always remember that this new holidaymaker sees the holiday as an extension of their life style. At home they take care of the environment, they re-cycle their rubbish, they are interested in the community; they are healthy, worry about their weight, exercise and go to the gym. They take care of their money; they're worried about their job and their pension so they always look for quality but with value. But they want to do something different, exciting, adventurous and educative that they can go home and tell their friends and family about. Remember the 'golden moment'.

4.3 HOW DO THEY TRAVEL?

Of course traditional forms of travel such as car, train and coach are still appealing but, with the cost of fuel increasing, the market may be deterred from using road transport and, in turn, rail will become more attractive. The problem though with all these form of transport is that they are slow. If a traveller is taking a three or four day (and much of the market is looking for several such breaks per year) break they are not going to spend two days travelling. The traditional answer to this problem, particularly for destinations some distance from their market is, of course, air travel.

Traditional flag carriers have cut out their commissions to travel agents and moved on to the web at competitive fares. Those that have not will struggle to survive – Alitalia being a current example. On many international services airlines such as British Airways, Lufthansa, Austrian and SAS now compete directly with the 'low cost' airlines on price whilst offering a better service level.

Currently there are approaching 60 low cost carriers (airlines) operating within Europe although I would expect a number of failures and consolidation in the approaching months. But it's interesting to note how the low cost carriers have grabbed the major share of the on line market. It's the ability of this market to be instantly available 24 hours per day to the consumer, to react to the market, to manage the fares on a minute to minute basis which is the key to the low cost model.



Source: Carl H. Marcussen, Centre for Regional and Tourism Research, www.crt.dk/trends, 28 Jan. 2008.

Figure 6: European online travel market 2007 - by type of service

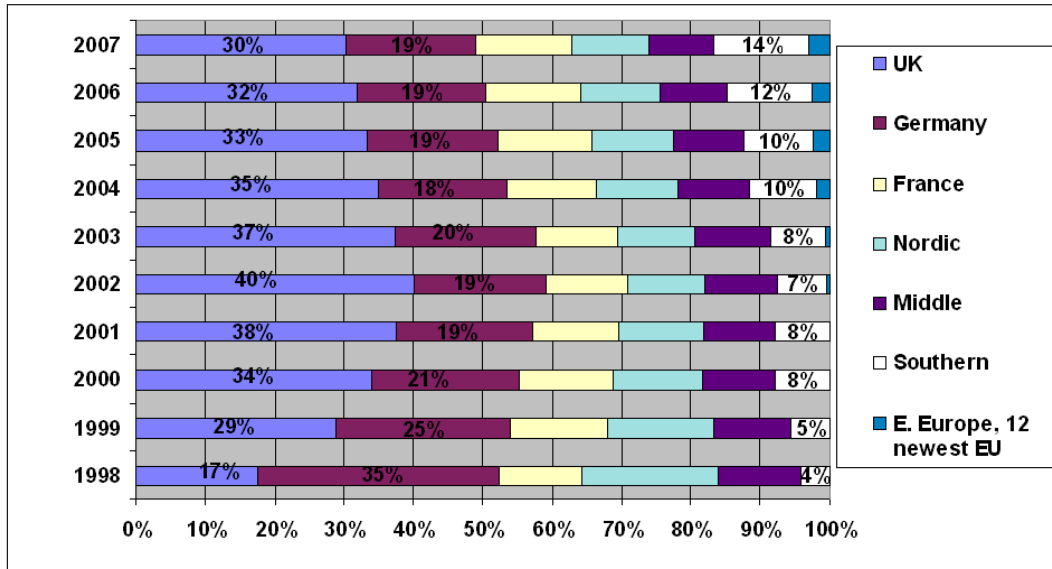
The result is that the bulk of low cost airlines now book 100% of their seats over the web and outsell the traditional tour operators in hotel rooms, insurance and car hire. For the two largest 'low-costs', Ryanair and EasyJet this will mean 3.5 to 5 million passengers each per month booking on the web this year – 2008. In fact the low cost airlines are compelling the traditional tour operators to change their product from a 'package' to a 'tailor made' holiday.

I pause here to welcome, for instance, the arrival of Montenegro Airlines at London Gatwick from June 2008 with flights to Tivat but, I must say, that the web pages supporting this flight are limited and prices look expensive.

When the low cost carriers started out ten years or so ago they limited themselves to home markets and to travel within the European Union. In fact they were scared of taking responsibility for checking visas and customs rules as a failure could lead to a large fine. Assisted by the opening of European Union skies and the need to expand though the low cost airlines have broken through these borders and now operate from the Azores in the west to the Red Sea in the east.

As the market has grown so have the number of bases. In the UK for example EasyJet moved within a decade from flying 2 domestic routes from an 'out of London' airport to operating over 400 routes to 100 destinations with a fleet of 167 aircraft. That one original base at London Luton has expanded throughout the UK then in to countries such as France and Spain which were slow off the mark in developing low cost markets. Where EasyJet once had a London Luton to Paris route it now has 20 routes to Paris just from the UK and its own base in Paris operating for the French market. Similar

developments with Ryanair, German Wings, Air Berlin and others have lead to the UK and Germany being market leaders in this field.



Source: Carl H. Marcussen, Centre for Regional and Tourism Research, www.crt.dk/trends, 28 Jan. 2008.

Figure 7: Trends in the European online market by country or region, 1998-2007

4.4 ATTRACTING THE LOW COST AIRLINES

Assuming the presence of a properly licensed airport etc. which we already have in Montenegro the first need is for appropriate market research to show existing a future markets for a route over, say, three years. Te research should show traditional travel patterns and how the new route would assist the traveller. An interesting market to take in to account here is the Montenegrans diaspara.

I would strongly recommend attending the ‘Routes’ conference held annually and the ‘Low Cost Airlines’ Conference, again held annually in London to establish relationships with the carriers. This, I’m sure, may already have been done.

It is almost ‘traditional’ now for airlines to ask destinations for assistance in marketing and low coast carriers can certainly put a new destination on the map. I’m told that such marketing spend could be in the region of \$250,000 which would equate to a small campaign on CNN.

4.4.1 LOW COST AIRLINES = LOW SPENDING VISITORS.

Basically this just isn’t true.

Research some years ago now which looked at a Ryanair flight arrival in provincial France in February shows a prospective spend by the passengers of \$75,000 and it's an oft quoted remark that passengers will save money on the flight and spend it on the holiday. Ryanair estimates that 25% of its leisure passengers stay in four star hotels or above.

4.4.2 WHAT DOES THIS DO FOR CETINJE?

A single sentence summary of the market situation within Europe would be that it's an ideal market for selling a small, interesting, historically rich destination such as Cetinje but if we want to plant one major thought in the minds of those tasked to market Cetinje it is 'don't try and sell the Cetinje' in isolation but as an integral part of its surroundings.

As we've seen above what the web can offer is an opportunity to sell an experience, to offer via the web and the media, the stories which attract this new independent traveller who is always looking for something new – something different.

The web is, of course, a huge source of information to the prospective traveller but it needs to be more. We've described, at length, the benefits of attracting a direct air route and this is vital to the whole scheme. The need to fly via another place to access the destination is a huge barrier to the traveller – a barrier of time, expense and temptation. They may think to stop at the first point of call – be it Belgrade or Dubrovnik. But to this we must add the needs of the traveller. A local tour company, guides, accommodation, car rental, transport links in general – the longer the list of accessible web sites which can deal with bookings and payments (services such as PayPal have helped a lot here) the better.

4.5 NICHES

It's fashionable in the travel industry to talk of niche markets but for a town like Cetinje they could be vital and could add to the rich historical mix that the town already offers. The new independent traveller likes to travel with a purpose and, as we have already seen, with the aim, not just of enjoyment but of learning and education. Looking just at Cetinje and its environs we've arrived at a, non exhaustive, list:-

- History,
- Architecture,
- Pilgrimage,
- Religion,
- Hiking,
- Bird watching,
- Local cuisine,
- Geology,
- Botony,
- Fishing,
- Local crafts,
- Bee keeping

The list truly is endless but needs basic services to go with it. Guiding, transport, accommodation, interpretation, expertise and mere availability. The modern visitor does not restrict themselves to arriving during particular seasons of the year or only travelling on certain days of the week and the best way of not making a visitor welcome is not to open the churches or the museums in the winter or close them on Mondays. The travel business operates every day of the year and – if you want to be part of it – you have to do the same.

In order to attract the visitor there is a major need to cover all the above on the web and – secondly to provide useful guides and maps translated properly in to the relevant languages plus signposting.

As important as the web pages are the need for us to broadcast in the story of Cetinje and its surroundings to the appropriate markets. Montenegro may be a well know destination but it's readily apparent that the delights of Montenegro away from the coast are not well known.

The story of Cetinje and it's attractions is not an easy story to tell and the simplicity of advertising – even if you had the budget – is not suited to that. The answer has to be in proper use of the media – newspapers, magazines, guide books, radio and TV.

For this to work correctly the correct journalists representing the correct media in the targeted markets must be chosen and followed up but experience shows that proper use of the media with personal or group press visits is the best use of limited funds. Like the traveller the media has a continuing appetite for new places and new stories and Cetinje seems to have these in excess – whether you recognise them or not.

A brief look at the existing guide books – particularly the UK published Bradt Guide to Montenegro gives us a cross section.

Cetinje as the ancient capital, its history, the embassy buildings etc.

Modern literature – the crime novels of Nero Wolf, Montenegro's mention in *The Great Gatsby* and the fascinating story of the Madonna of Philermos. Was this the origin of *The Maltese Falcon* legend?

The appeal of the Madonna and of the relics in Cetinje Monastery – interesting example of a niche market here for Russian Orthodox pilgrims.

The history of the Petrovic family and their relationship to the Royal families of Europe.

Walking in Lovcen National Park and the story of the the Njegos Mausoleum.

For journalists of any country and working in any medium there is plenty of material to give Cetinje and its surrounding the publicity it needs.

The forthcoming opening of flights to London Gatwick with Montenegro Airlines would be an ideal opportunity to set up the first press visit.

CHAPTER 5

THE CULTURAL TOURISM STRATEGY: ACTION PLAN

The aim of chapters 1-4 of this report has been to describe the landscape into which the cultural strategy for Cetinje is to be placed. We have thus defined cultural tourism, described the economic and institutional context, identified the cultural tourism offer in Cetinje and its hinterland, and analysed the market for cultural tourism in and around the city.

Our objective now is to draw the threads together and to set out a programme of work that reflects our analysis and places the future work of colleagues in Cetinje and MNE more widely on a clearly defined trajectory.

The Strategy is thus based on 5 specific strategic groups (SG): strategy management, spatial planning, education, regional tourism development (including regional tourism marketing), festivals and exhibitions.

With the exception of the management group, each of other 4 groups contains subsidiary working groups (WG). The aim of these will be to design and implement specific projects each of which will have clear aims and objectives. These projects may be generated in co-operation with specific funding agencies, and will thus have the possibility of directly attracting funding from those agencies – including the EC, UNDP, World Bank, Rockefeller Brothers and others.

SG I: MANAGEMENT OF STRATEGY

The first strategic group is concerned with the management of the strategy. It has two parts, a development council and an executive management group.

Development Council

In co-operation with the Montenegrin government authorities, and the UNDP, the British Council team will set up a *development council*. The aim of the council is to act as 'champions' of the cultural tourism strategy for Cetinje and region. Members may include a representative from the MNE President's office, the Minister of Tourism, the British and German ambassadors, the Head of the UNDP, a representative from the Council of Europe, and a nominated representative of the British Council Cultural Tourism Group.

Management Group

A management group, under the joint chairmanship of Jovan Martinovic, Head of the Cetinje TO and the Head of the Museum and Libraries Board (and containing a nominated representative from the British Council) will be set up to manage the future course of the cultural tourism strategy. The members of the management group will be the chairs or secretaries of each of the 6 working groups.

A key activity of the management group has to be in identifying of areas where further research needs to be provided for the WG to function most effectively. It is stressed on numerous occasions within the last WTTC report on Montenegro, that there is an overall

lack of research to inform clear and accurate decisions across the tourism sector. We would like to strongly back those statements, and recommend here that whenever it is identified by the WGs that research needs to be conducted, those calls get sent back to the management group in the shape of specific sub-project proposals for which local, national or international funding can then be sought. By such a process actions will be directly responding to needs identified at the working face of the industry.

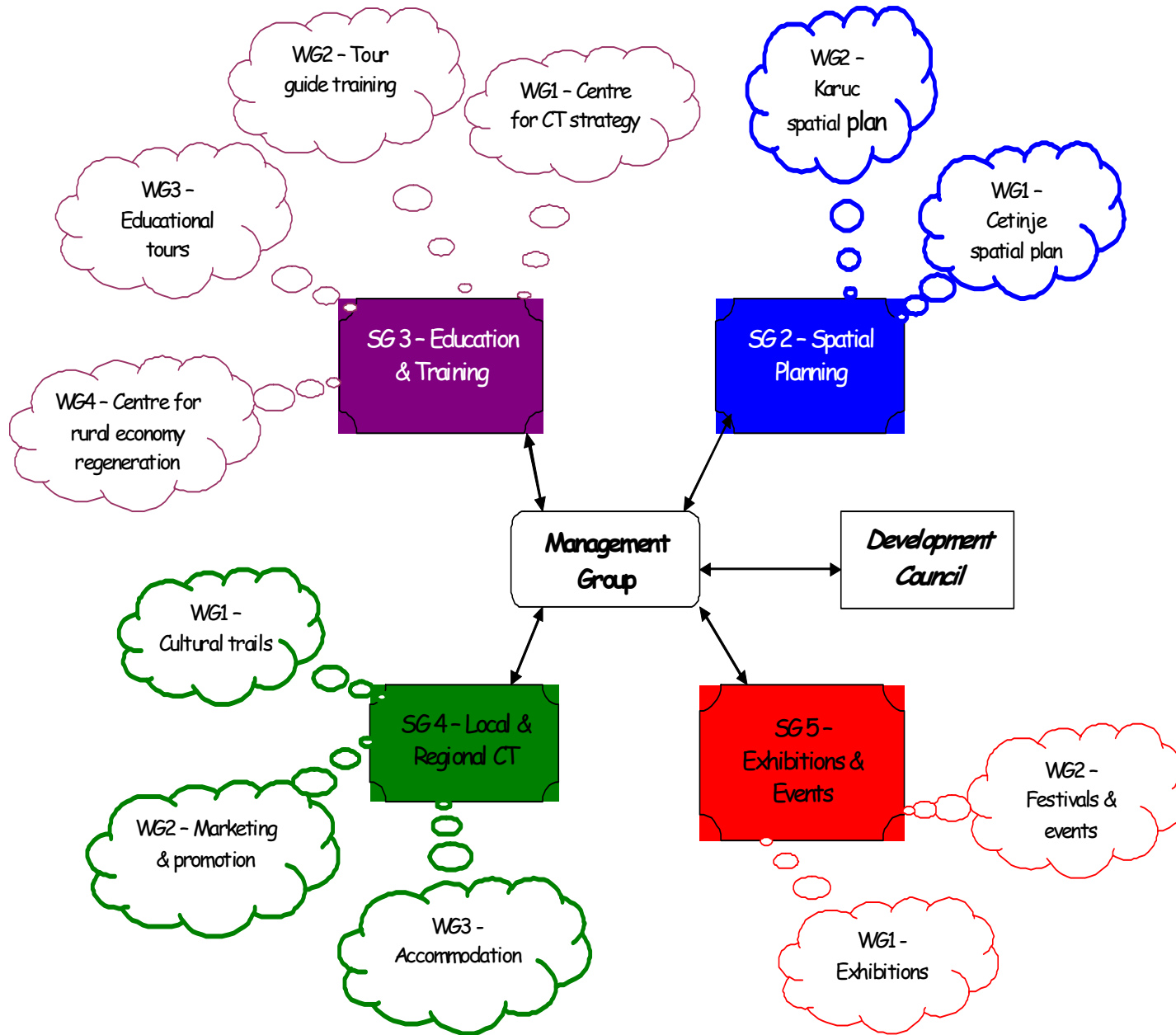


Figure 8: Action plan - Organisational diagram

SG II: SPATIAL PLANNING

The objective of this SG is to contribute to the work of the National Spatial Plan at the local level of Cetinje municipality. We propose two working groups, one of which will be concerned with Cetinje city, the other with NP Lake Skadar.

WG 1: Cetinje City Spatial Plan

This WG will be chaired by an architect with extensive experience of Cetinje as one of the cultural centres of Montenegro. At the broadest level, the WG will have two aims. The first is to conduct an audit of the city's cultural heritage and the regulatory planning framework within which this heritage is protected. Much of the information for such an audit is already available. The second is to ensure that the forthcoming location study of the city is informed by the now extensive experience of the planning of historic cities in European and Mediterranean regions. There will be extensive opportunities within this group not only to network with colleagues in comparable cities elsewhere in these regions and beyond but also to generate projects for the city (possibly under the aegis of the Rockefeller Brothers).

WG 2: Spatial Plan of the Karuc area of NP Lake Skadar

The Karuc area of NP Lake Skadar is scheduled for a local spatial study in 2008. It is an area of outstanding natural and cultural features and lies at the heart of the area of the national park due for integration into the Hiking and Biking Scheme. As discussed at some length in chapter 2 this is one of the areas in which protection, conservation, and very careful planning needs to be focussed. We propose that this WG should be invited to contribute to the work of the location study team. *Given that this area, as the NP as a whole, is the subject of widespread, complex, and overlapping plans and ambitions (for hike/bike tourism, re-generation of villages and rural economies) there is ample room for a specialist WG to work alongside the government's own location study team. There is now an extensive and growing body of literature on the good management of national parks in Europe and beyond.*

There are a number of overlapping benefits that will flow from this WG if approached with imagination. For example, the group should co-operate with the Montenegro NTO's VET Scheme (cf chapter 2) and the British Council to promote work by university students (in both Montenegro and the UK) in this area study. Such a study could become part of a joint exercise by two universities and would demonstrate from the start that the Cetinje cultural tourism strategy was truly 'hands on'. It would also clearly make a contribution to the work of local area studies more generally and thus be of benefit to the development and implementation of the NSP at a national level. Locally, it would involve residents in the Karuc area (through the *mjesna zajednica*) and demonstrate that location studies needed to work from the field level upwards. It would gain an extremely positive media coverage (not only locally but also internationally) which, played with appropriate skill, would greatly assist the placing of the NP and Cetinje Municipality on the cultural tourism map of Europe.

SG III: EDUCATION AND TRAINING

There can be no successful cultural tourism strategy in Cetinje unless informed, shaped, and supported by a wide ranging education policy in the municipality's educational

institutions, including the university, schools, and adult education centres (and/or future centres). Chaired by a senior academic from the Academy of Arts, the SG should contain representatives from schools and museums and the voluntary sector.

WG 1: Centre for Cultural Tourism Strategy

We propose that a Centre for Cultural Tourism Strategy be set up in one or more of the University of Montenegro departments based in Cetinje, and that immediate proposals for a post-graduate (preferably Master's course in the first place leading on to doctoral courses in due course) be initiated. A direct bilateral relationship can be made between this Centre and the newly created Centre for the Anthropology and Political-Economy of Culture (APC) at London Metropolitan University. The aims of the Centre would be to promote a full range of educational interventions in the Cultural life of the city and the relationship this has with cultural tourism there. The MA and doctoral work should definitively be aimed at domestic and international students and the overall aim should be to make Cetinje city a central point for the education in the management of historic cities. There are multiple opportunities for engagement of such a Centre with programmes of the EU (such as the TEMPUS programme) and other international agencies and institutions.

WG 2: Tour Guide training & re-training

Cultural tourism strategies – everywhere (from London to Paris to Sarajevo to Cetinje) depend to a considerable extent on competent guides. To complement and contribute to the work of the existing tourist guides in the city, a new cadre of guides needs to be trained and familiarised with the needs and expectations of different groups of tourist arrivals. Adaptations should be made, so that tourist arrivals are not treated as an homogenous mass. For instance different styles of presentation may be needed for different nationalities of tourist. Additionally the materials and information presented should reflect on the broadest interpretation of 'cultural tourism' and not simply explain about a few historical events, figures and buildings. Such a course would fit well into the work of the Centre for Cultural Tourism Strategy.

WG 3: Educational tours to Cetinje municipality

The brief of this WG, as alluded to in chapter 3 of this strategy, is for Cetinje to forge a far more coherent position as a centre for school and other educational visits. The town does currently receive school visitors on an ad hoc basis, but what is required is for the town and district, on a consistent and much more expansive scale than anything that takes place at the moment. This should reflect Cetinje's position at the heart of Montenegrin culture and history. Thus with an evolving national curriculum in Montenegro, closer links need to be made between the work of Cetinje's museums, library and other cultural assets on the one hand, and educational institutions covering all ages nationwide. Additionally, the links between culture and nature, constantly referred to throughout this strategy, can be added into the melt with use made of the heritage visible throughout the two national parks in Lovcen and Lake Skadar.

It is self evident that the effort here will involve activities both in the classroom itself and in the field. Also it is clear that coordination would have to happen between Cetinje Municipality and several ministries most significantly the Ministry of Education. This

suggests that the lead for this WG might best come from colleagues in the educational sector based within Cetinje itself.

WG 4: Establishment of a Centre for the regeneration of the rural economy and cultural heritage

For this WG we propose a very specific plan, namely that the old school house in Drusici in NP Lake Skadar be made into a centre for the revival and protection of rural culture and economy. The focus here would be on the regeneration of traditional rural crafts as well as the intangible heritage of the area. The Centre could offer courses (to locals and tourists) in such subjects as beekeeping, winemaking, cheese making, basket weaving, herbal remedies, as well as more specialised occasional courses in subjects such as tourism in national parks. Crafts and designs identified in this centre could also be linked into the production of souvenirs, either made at the centre or done in collaboration with the existing souvenir production centres in the academy of fine arts and national museum in Cetinje.

It would be a natural point of attraction for the school trips and university students – and (crucially) local residents. We would suggest that the WG is jointly chaired by a member of the *mjesna Zajednica* and representative of a NGO specialising in environmental issues (such as *Expedition*). We would recommend that those involved in this Centre make immediate contact with (a) the School for the Enhancement of Rural Crafts, FODESMA, in Ciutat de Mallorca (b) the Maltese NGO in environmental affairs, *Ambient*.

SG IV: LOCAL AND REGIONAL CULTURAL TOURISM

The aim of this SG is to develop the regional tourism networks around which Cetinje's cultural tourism strategy can be linked.

The fact is that the market is simply too small for a cultural tourism strategy for Cetinje to be self-contained within the boundaries of the city and its municipality alone. Any such strategy also needs to be part of a wider strategic outlook that places Cetinje within regional settings – over (for example) the overlapping boundaries of the states of former Yugoslavia, the Western Balkans more generally, Russia and the former Soviet Union, SEEurope, Europe itself, the Mediterranean – and so on.

WG 1: Regional Tourism: Cultural Trails

Taking a lead from the excellent document, *Concept for Cross-Border Development* produced by the GTZ one main aim of this WG will be to work co-operatively with institutions in neighbouring states (such as Serbia, Croatia, Bosnia and Herzegovina, and Albania) to pool knowledge and best practice about international policies (about conservation and protection of built and natural heritage) and their relation to cultural tourism. A second, and linked, aim would involve the very practical business of composing and mapping regional cultural tours/trails involving Cetinje and introducing these into the cultural tourism offer of the region. One very obvious example of such a regional approach would involve MNE/Russian Orthodox links enabling those interested in Cetinje's iconography to be more widely available to Russian tourists.

WG 2: Cultural Tourism Marketing and Promotion

Given that Montenegrin tourism marketing is managed very efficiently and effectively by the NTO the question is whether there is any contribution to be made by the cultural tourism strategy. We would argue that the contribution might lie in the regional sphere. Building on the experience of the British Council/ London Metropolitan University team in such European projects as MED-VOICES www.med.voices, TEMPUS (Bosnia-Herzegovina) and TEMPUS (Palestine) as well as the recent co-operation between British Council (Serbia and Montenegro) and London Metropolitan in the recent FP7 project application, we suggest that an marketing effort aimed at integrating Cetinje into a wide tourism region would work well. There are multiple opportunities for project development in this sphere.

Additionally, a marketing WG would work with the NTO to raise awareness and spread information about the wide cultural offer in the region. Materials should be regularly updated and added through the www.montenegro.travel web portal. Also the WG could promote and coordinate press and tour operators trips (also known as study tours - see chapter 2) of Cetinje, NP Lovcen, NP Lake Skadar, and the surrounding area. The possible arrival of 'budget' airlines to Montenegro needs to be further explored and exploited. As explained in chapter 4, they represent not just a boost to mass coastal tourism, but also to cultural tourism as many passengers will be looking for short city and other niche breaks.

WG 3: Accommodation

It was pointed out in chapter 3 that some initial steps have been taken to allow guests to remotely book their accommodation within Cetinje municipality. However, there does still seem to be a lack of consistency across the various websites in presenting all of the options available. Most particularly there is a gap in the segment of 'private accommodation'. One suggestion for this WG therefore, would be to help with the establishing of a more coherent and visible face for this type of accommodation, by the formation of a bed & breakfast or small hoteliers association. As one of the issues for micro businesses is their lack of budget, such a group could help with some form of collective marketing and assist in ensuring the visibility of all members across the sites where direct bookings are made.

Another issue within small family run accommodation is the need for training, both in the area of languages needed to communicate with new guests, but also in terms of the type and style of presentation that is most positively received by tourists unfamiliar with the region. Such training for instance could include the passing on of information relating to local foods, traditions and customs. With the help of a common association.

This WG also needs to examine the presentation and quality of rooms and services provided in larger hotels. Investments have to happen to ensure a more contemporary image is presented, in particular for the Hotel Grand. During that process, consideration has to be given as to what styles and expectations there will be from the new 'cultural tourists' Cetinje is so eager to attract.

SG V: EXHIBITIONS AND FESTIVALS

All cultural tourism strategies we are aware of contain references to the importance of exhibitions and festivals. This SG thus will have the responsibility to promote cultural festival and exhibitions in the city and should be co-chaired by the Director of the National Library and the Director of one of city's museums.

WG 1: Organisation of exhibitions in the library and museums

There are multiple opportunities for networking across the region and beyond and we can imagine, for example, a fruitful exhibition – held jointly in succession in the Cetinje National Library and the National and University in Sarajevo – on the life and work of Ivo Andric. This could very well lead on to a wider exhibition (involving Andric and other classic – and young – Balkan writers) in the British Library.

WG 2: Further cultural festivals and events in Cetinje

We are aware of the demise of the Cetinje Biennial, but also note the success of many of its previous activities. It is therefore, recommend that new cultural festivals and events be mounted in the city. This WG needs to explore a range of collaborations that may be activated on the cultural scene. One immediate possibility could be through the sharing of experiences in the field of 'cultural mapping'. The authors of this report are familiar with the work of one UK based art & architecture collective called *Public Works*. This group has been very active in finding ways of allowing real engagement with communities when exploring local cultural spaces and practices (see for instance www.folkfloat.org). *Public Works* could be involved in an exchange of approaches with a local group such as the Books of Knjige. This may lead to alternative ways of collecting and presenting the more mundane or quirky aspects of Cetinje culture and maybe channel them through mobile events. Such links would be another way of creating a more international dimension to events.

APPENDIX I

PROGRAMME OF MEETINGS

First workshop: Cetinje 26-27 February 2007

Coordinated by: Katarina Nikolić – British Council manager

Facilitated by: Professor Tom Selwyn & Jonathan Karkut – London Metropolitan University

Attendees: From relevant institutions and organisations that are in any way involved in local tourism in Cetinje but also other local communities representatives such as citizens, NGOs, media, local government, governmental institutions and ministries. Those that came are as follows:

1. **Zoran Duletić** – Deputy minister of Tourism
2. **Lidija Ljesar** – Ministry of Culture, Sports and Media
3. **Alma Henić Strahinja** – National Tourist Organisation
4. **Petrica Duletić** – Museums and
5. **Janko Ijumović** – Fakultet dramskih umjetnosti
6. **Jelena Đurović** – Centralna narodna biblioteka
7. **Dragica Lompar** – Centralna narodna biblioteka
8. **Gordana Bilobrk** – Zavod za zaštitu spomenika kulture Kotor
9. **Jovan Martinović** – TO Cetinje
10. **Sulejman Muković** – TO Rožaje
11. **Rasim Luboder** – NGO Pravi put
12. **Dževdet Luboder** – NGO Runolist
13. **Sandra Kapetanović** – NGO Expeditio
14. **Slavica Vukčević** – Centar za inicijative iz oblasti održivog turizma
15. **Stanislava Pavlović** – GTZ
16. **Stefan Krell** – GTZ
17. **Violine Konar-Leacy** – USAID
18. **Andriela Vitić** – THT Fakulet – Kotor
19. **Luka Milunović** – Opština Cetinje
20. **Kristina Kujundžić** – Prohelvetia
21. **Lazar Pejović** – Fakultet likovnih umjetnosti
22. **Đoko Mirković** – Novinar "Pobjede"
23. **Svetlana Žugić** – Republički zavod za zaštitu spomenika kulture
24. **Milenko Pasinović** – THT Fakultet – Bar
25. **Boris Marđonović** – Udruženje hotela Crne Gore
26. **Sanja Mitrović** – student
27. **Nataša Ratknić** – student

Second workshop: Cetinje 13-14 December 2007**Coordinated by:** Katarina Nikolić – British Council consultant**Facilitated by:** Dr Julie Scott & Jonathan Karkut – London Metropolitan University**Attendees:**

1. **MARTINOVIĆ, Jovan** - TO – Cetinje
2. **BOZOVIĆ, Biljana** - TO – Crne Gore
3. **KAPETANOVIĆ, Sandra** - EXPEDITIO
4. **PASINOVIĆ, Milenko** - THT Fakultet – Bar
5. **PEJOVIĆ, Lazar** - Fakultet Likovnih Umjetnosti
6. **VUKČEVIĆ, Slavica** - Centar Za Inicijative Iz Oblasiti Održivog Turizma
7. **VITIĆ, Andrijela**- THT Fakultet – Kotor
8. **ĐUROVIĆ, Jelena** - Centralna Narodna Biblioteka
9. **LOMPAR, Dragica** - Centralna Narodna Biblioteka
10. **DULETIĆ, Petrica** - Muzeji i Galerije Podgorice
11. **HENIĆ STRAHINJA, Alma** - GTZ
12. **MARĐONOVIĆ, Boris** - Udruženje Hotelijera i restoratera
13. **FRANOVIĆ, Nastasimir (Misko)** - Turisticka Agencija *Intermonte*
14. **JOVANOVIĆ, Natasa** - Narodni muzej
15. **SJEKLOCA, Bojana** - Narodni muzej
16. **BERKULJAN, Aleksandar** - Narodni muzej
17. **MARTINOVIĆ, Dragan** - Narodni muzej
18. **DJURANOVIĆ, Tamara** -Narodni muzej
19. **VUSUROVIĆ, Slobodan** - Narodni muzej
20. **JOVANOVIĆ, Ivona** - Fakultet za turizam, Kotor
21. **KAVAJA, Sanja** - Narodni muzej
22. **BOZOVIĆ, Marijana** - Fakultet za turizam, Kotor
23. **VUJANOVIĆ, Marko** - TO - Cetinje
24. **SCHWEIGERT, Thomas** - Univerzitet Wisconsin

Third field mission: Cetinje 17-19 March 2008**Coordinated by:** Katarina Nikolić – British Council consultant**Research and interviews by:** Professor Tom Selwyn – London Metropolitan University**Meetings with:**

Katarina Nikolić - British Council and Projector

Garret Tankosić Kelly - UNDP

Pedrag Daković - UNDP

Biljana Bozović - Montenegro NTO

Jovan Martinović - Cetinje TO

Aleksander Berkuljan - National Museum

Jelena Djurović - National Library

Caroline Jovicević – Lake Skadar

Janko Jovicević - Lake Skadar

Sandra Kapetanović - Expeditio (interviewed by phone)

APPENDIX II

REFERENCES

The following documents and websites were referenced in the compilation of this report:

Websites

Montenegro NTO – www.montenegro.travel

National Museum of Montenegro - www.mnmuseum.org

Municipality of Cetinje - www.cetinje.cg.yu/engleski/index.htm

Government of Montenegro - www.vlada.cg.yu/eng

Ministry of tourism & environment - www.vlada.cg.yu/eng/mintur

Ministry of culture, sports & media - www.vlada.cg.yu/eng/minkult

Statistics Office of Montenegro - www.monstat.cg.yu/EngPrva.htm

dBO Advertising Agency, Montenegro - www.visit-montenegro.org

dBO Advertising Agency, Montenegro - www.destination-montenegro.com

National Parks Montenegro - www.nparkovi.cg.yu/np_english.htm

Montenegro adventures – www.montenegroadventures.com

So! Montenegro: independent UK company - www.somontenegro.co.uk

The Books of Knjige – www.thebooksofknjige.com

Documents

(NTO brochures):

Wilderness Biking Montenegro

Montenegro Obala

Explorer Montenegro

Culture NP Skadar

APPENDIX III**ADDITIONAL CONTACTS****British Council Montenegro office**

Bulevar sv. Petra Cetinjskog 149/3
81000 Podgorica
T. 081 205 440
F. 081 205 441
E. pginfo@britishcouncil.org.yu

Cetinje Tourism Office

Bajova 2
81250 Cetinje
T. 086 230 250
E. ctturizam@yahoo.com

National Tourism Organisation

Rimski trg 47
Podgorica
T. 081 235 155
F. 081 235 159
E. biljana.bozovic@montenegro.travel

National Museum of Montenegro

Novice Cerovića bb
81250 Cetinje
T. 086 230 310
E. alberk@cg.yu

National Library of Montenegro

Bulevar Crnogorskih Junaka 163
81250 Cetinje
T. 086 231 726
F: 086 231020
E. cnb@cg.yu
jdjurovic@cnb.cg.yu

GTZ

Hercegovačka 10/3
Podgorica
T. 081 235 155
E. alma.strahinja@cg.yu

Author contact details:**Tom Selwyn**

London Metropolitan University
Stapleton House
277-281 Holloway Road
London N7 8HN
Tel: 020 7133 3980
Fax: 020 7133 3082
Email: t.Selwyn@londonmet.ac.uk

Jonathan Karkut

London Metropolitan University
Stapleton House
277-281 Holloway Road
London N7 8HN
Tel: 020 7133 3919
Fax: 020 7133 3082
Email: j.karkut@londonmet.ac.uk

Julie Scott

London Metropolitan University
Stapleton House
277-281 Holloway Road
London N7 8HN
Tel: 020 7133 3933
Fax: 020 7133 3082
Email: j.scott@londonmet.ac.uk

John Bell

Hills Balfour Synergy
3rd Floor, Colechurch House, 1 London Bridge Walk
London SE1 2SX
Tel: 07715 370447
Fax: 020 7407 3810
Email: johnbell@hillsbalfoursynergy.com