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TOURISM POLICY IN MONTENEGRO – CURRENT SITUATION AND FUTURE CHALLENGES

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Abstract

Located on the coast of the Adriatic Sea, Montenegro has been an important receptive market for decades. In accordance with strategic documents, tourism has been identified as a leading economic activity in Montenegro. Although it has a diversified tourist offer, the emphasis has been put on coastal tourism. Adapting to changes in the market, the offer has been transformed from mass, social vacations towards individual products intended to premium customers. Therefore, the aim of this paper is to evaluate the effects of the current tourism policy defined by Montenegro tourism development strategy to 2020. The analysis includes the key indicators of the tourism industry. The results have shown that seasonality is the major obstacle for the balanced tourism development. Hence, all efforts should be directed towards creating products that exceed classic “sun, sand, and sea” tourism model.

Key words: Montenegro, Adriatic coast, tourism policy, destinations, achievements, challenges

INTRODUCTION

In recent decades, Montenegro has become an increasingly popular destination for visitors, as an “undiscovered pearl” of the Adriatic. It has a coast of 293 km (73 km of beaches), and numerous tourist centers from Ulcinj to Herceg Novi, which are famous for their sights. Thanks to the diversified offer (protected natural and cultural heritage), besides the coastal, numerous selective forms of tourism have been developed (adventure, rural, cultural, wine, sport, ecotourism, etc.) (Dašić & Jovičić, 2011). Montenegro sees its future in tourism development because it affects the economy of the whole country and the lifestyle of its citizens. This goal has been supported by the fact that the total tourism revenue has been increased from 86 million to 480 million EUR for only six years (2001–2007 period) (Montenegro Ministry of Tourism and Environment, 2008). Despite this success, the position of Montenegro in the global tourism market is weak. It

is faced with numerous issues – does not have the unique tourism product, lack of well-trained personnel, short summer season, etc.

This country has a 150-year long tradition of organized tourism. The tourism development is related to the construction of the first accommodation facilities in the second half of the 19th and the beginning of the 20th century (hotels “Lokanda”, Cetinje; “Plaža”, Zelenika, “Boka”, Herceg Novi; and “Avala”, Budva) (Đurić, 2012). After World War II, Montenegro had been part of the different state unions – the SFRY, the Federal Republic of Yugoslavia, and Serbia and Montenegro (until 2006). Bearing in mind these changes, it is understandable why Montenegro tourism development has gone through several stages. Since the 1960s mass tourism was developed very fast thanks to social politics of SFRY. This model involved the massive construction of state-owned facilities, as well as individual facilities (e.g. second homes). There was a system of “salaried holidays for employees” as a type of collective recreation (Grandits & Taylor, 2010). At the same time, the infrastructure was built (Adriatic highway in 1965), and the Tourist Association of Yugoslavia was also established (Župančić & Puljić, 2017). This trend was continued through the 1970s and 1980s (“golden age of mass tourism”). In 1978, there were almost 22,000 facilities, mostly complimentary (more than 60%), in which over nine million overnight stays were realized (Widawski & Wyrzykowski, 2017). The best results were achieved in 1987 with almost 400,000 tourists and 11 million overnight stays. The tourism industry owned 137,000 beds and thus generated the bulk of GDP (Ratković, 2010). During the nineties, tourism has been faced with severe issues caused by political instability, civil war, and financial crises (Bickert et al. 2011). International sanctions and isolation, as well as NATO intervention, have contributed to the collapse of the economy, including tourism. The tourism industry was insolvent with chronic losses and a lack of new investment projects. At the beginning of the millennium, a period of stabilization and continual recovery began, with the adoption of the key development documents and the establishment of a new political, economic, and social environment (Adžić & Žižić, 2016).

TOURISM POLICY AFTER THE 2000s

Tourism policy could be defined as a guide for the all stakeholders in tourism that establish general goals and objectives and the order of the actions' implementation for the further tourism development (Goeldner & Ritchie, 2006; Biederman, 2007). The important aspects of tourism policy are marketing, planning, and sustainability in the economic, social, and environmental terms (Edgell et al., 2008). It includes documents adopted for different levels of the tourism management.

Tourism development of Montenegro has been regulated by six specialized laws – Law on Residence Tax, Law on Ski Resorts, Law on Mountain Trails, Law on Tourism, Law on Tourism Organizations, Law on Rafting, Law on Tourism and Hospitality, and a number of by-laws (Ministarstvo održivog raz-

voja i turizma, 2013). Apart from these, many strategic documents for the different levels of the regulation have been adopted since the independence (table 1). Additionally, a more detailed tourism development at the local level is defined by spatial planning and urban planning documentation.

Table 1. The main strategic documents for the field of tourism

Document	Project carrier	Year
Touristic Masterplan for Montenegro	German Investment and Development Company	2001
Regional Concept of Boka Bay Master Plan	German Investment and Development Company	2003
Human Resources Development Strategy for the Tourism Sector in Montenegro	German Technical Cooperation	2007
Spatial Plan for the Special Purpose of the Coastal Area	Ministry of Economic Development	2007
Montenegro Tourism Development Strategy to 2020	Ministry of Tourism and Environment	2008
Action Plan for Preparation of Tourism Seasons	Ministry of Sustainable Development and Tourism	2013
Montenegro Regional Development Strategy 2014–2020	Ministry of Economy	2014
The Direction of the Montenegro Development 2015–2018	Ministry of Finances	2015
National Strategy of Sustainable Development to 2030	Ministry of Sustainable Development and Tourism	2016

The starting point in the regulation of the future tourism development was the adoption of the Touristic Masterplan for Montenegro in 2001, carried by German Investment and Development Company (DEG). In the Masterplan, the necessity for the establishment of the tourism policy framework was emphasized. Besides, the overall aim of the tourism development was defined. It included several segments: first, Montenegro will become an exclusive destination at the Mediterranean, with developed both summer and winter seasons (DEG, 2001); and second, the economic prosperity of the citizens and the whole country in general. These goals are planned to be achieved by attracting foreign investments and the erection of the high-quality hotels (3* and above), employment of the well-trained staff, and creating new recognizable tourism product of Montenegro (DEG, 2001; GTZ, 2007; Ministarstvo za ekonomski razvoj Republike Crne Gore, 2007; Montenegro Ministry of Tourism and Environment, 2008). Bearing in mind that the coastal tourism has been dominant in Montenegro for decades, further tourism development should be oriented towards balanced year-round tourism that includes all country regions. In that sense, the whole country has been divided into six clusters – three in the coastal and three in the mountain region. Also, there are two linking clusters that con-

nect Adriatic coast with the mountain region through Podgorica and Nikšić (Coast – Durmitor Mt. and Coast – Bjelasica and Komovi Mts.). In accordance with the natural and anthropogenic resources, the main tourist products have been proposed for each cluster (table 2). These products should reflect the main tourism development idea: „Montenegro wild beauty“.

Table 2. Tourism Clusters

Cluster	Tourism Products
Budva – Bar	Coastal tourism
Ulcinj	Coastal and nature-based tourism
Boka Kotorska	Coastal, cultural, sports and health tourism
Skadarsko jezero – Cetinje	Nature-based, rural tourism, MICE
Bjelasica and Komovi	Nature-based, rural tourism, MICE, wellness
Durmitor and Sinjajevina	Nature-based, sports and family tourism

Source: Ministry of Tourism and Environment, 2008; Đurašević, 2009; Dašić, 2011.

As Coastal region represent the major tourist destination in Montenegro, it is faced with numerous problems due to mass tourism and high seasonality – space saturation, illegal building, waste problems, water supply problems, crowded beaches, and low consumption power of tourists (DEG, 2001; Montenegro Ministry of Tourism and Environment, 2008). In order to mitigate these negative tourism impacts and manage tourism development, many planning documents for the regional and local levels have been adopted (e.g. Regional Concept of Boka Bay Master Plan, 2003; Special Purpose Spatial Plan for the Coastal Zone, 2007, 2018; Coastal Area Management Programme Montenegro, 2008, 2013; Action plan for the Tourist Season Preparation, 2013).

Attempts for overcoming the problems of highly concentrated tourism traffic in the coast can be seen in sustainable tourism development in the mountain region and its national parks (e.g. Biogradska gora, Durmitor, Lovćen, Prokletije, and Skadar Lake). Beautiful landscapes, nature, and cultural heritage are the main resources for the different tourism activities. Hence, tourism development has been listed as one of the strategic goals in the Special Purpose Spatial Plans for the National Parks. In order to meet the overall goal, some individual goals have been established – tourism infrastructure and tourism product improvement, efficient visitors’ management, and environmental impact assessment (Ministarstvo održivog razvoja i turizma, 2018).

MAIN PLANNING DOCUMENTS GOALS REALIZATION

Montenegro seeks to attract more international tourists and to become exclusive destination. In order to achieve these goals, many preconditions have to be met, as it was stated in the Montenegro Tourism Development Strategy to 2020 (2008). Comparing the goals in the main planning documents and current

situation, the authors wanted to analyze the degree of realization of planned activities. Key areas are stated as follows:

Positive trends in tourism development – Montenegro records constant increase in the number of arrivals from 1.19 mn to 2.0 mn (an increase of 68%) and a number of overnight stays from 7.79 mn to 11.95 mn (an increase of 53%) comparing 2017 to 2008. Tourists stayed a little more than six nights (6.5 – 6.7 for foreign tourists). Approximately 90% of arrivals and 95% of overnight stays were recorded in seaside resorts, among them the most in Budva (42%), Herceg Novi (20%), and Ulcinj (10%). In 2017, about 67% of overnight stays were spent in private accommodation and only 21% in hotels (MONSTAT, 2009–2018c). Conditionally, there are two problems related to the creation of exclusive destinations: seasonality and emissive markets. Over 75% of arrivals and 80% of overnight stays are made during the summer months (June–September). On the other hand, most of the guests are tourists from the region of the former Yugoslavia, primarily Serbia (up to 30%), Bosnia and Herzegovina (about 10%), and Russia (about 20%) (MONSTAT, 2009–2018c). Participation of visitors from the Western countries is negligible. Bearing in mind the above, it can be concluded that the intended objectives have not been sufficiently achieved.

Tourism as an engine of economic development – As a consequence of the achieved results, the tourism industry participates directly with 10–13% in GDP. When taking into account the indirect and induced participation of other sectors, the results are better (31.3% or \$1.2 bn in 2008 and 23.7 or \$1.1 bn in 2017). In total revenues, international tourism contributes \$0.7 bn in 2008 to the record \$1.1 bn in 2017. The increased demand has contributed to greater investment in this sector (accommodation, restaurants, leisure facilities, passenger transport equipment, etc.). In 2017, 35.1% or more of \$0.4 bn was invested in major projects. Additionally, there were 14,400 direct employees (7.1%), and indirectly 36,500 (19.3%) of jobs were supported by this industry (WTTC, 2018). Individually observed, in this sector, there were more employees than in all the others together. Finally, Montenegro records gradual, but constant progress in terms of the mentioned indicators, but additional efforts are needed to achieve the goals of the Strategy by 2020.

Development of new high-quality accommodation facilities – In order to form an exclusive offer, the Strategy envisaged the construction of new, but also modernization and privatization of existing hotel facilities. In the Touristic Master plan for Montenegro (2001), it was forecasted that the hotel capacity will be increased from 25,879 in 1997 to 50,000 by the year 2010, and further to 100,000 by 2020. These plans are only partially met. In 2010, approximately 166,500 beds were registered, of which 27,000 were in hotels. These were mostly lower category facilities, while most of the capacity related to the individual, private accommodation (MONSTAT, 2011). There were 70 facilities with slightly more than 9,000 beds in four and five-star hotels. In the 2012–2016 period, Montenegro has improved its offer with 5,000 beds in highly-rated

hotels. In addition to Porto Montenegro (2009) with an investment of 450 million euros, extensive investment projects are in progress in Boka Kotorska on the tourist complexes of “Lustica Bay” (€1.2 bn), “Porto Novi” (€650.0 mn), and “Beyond Horizon” (€270.0 mn), whose opening is expected in 2018. In the coming period, investment activity will be continued in the coastal area (“Montenegro Holiday Village”, Ulcinj; Military and tourist complex “Bigova”, Kotor; and Donja Arza, Herceg Novi), but also in the central and northern parts of Montenegro (Eco lodge in Vranjina, Skadar Lake; “Kolašin 1600”, Military and tourist complex “Mediteran”, Žabljak) (Jovanović et al., 2017).

Development of a unique and integral tourist destination— As one of the long-term goals by 2020, the development of alternative forms of tourism is emphasized, as a complimentary offer to coastal tourism (DEG, 2001; Ministry of Tourism and Environment, 2008). The accent is on nature-based tourism the hinterland (camping, sport, adventure tourism, agro-tourism, etc.), either near the shore (e.g. Orijen, Vrmac, etc.) or in the “catunes” in Northern Montenegro. All activities must be in harmony with the environment. They are carried out in five national parks. With over 320,000 visitors (130,000 in Durmitor, 90,000 in Lovcen, and more than 50,000 in Skadar Lake) and total earnings of over 900,000 euros, the results have met all expectations (www.nparkovi.me).

Besides, many third age people are involved in travel, so the offer has to be segmented. They are especially interested in cultural and health tourism (wellness), but also golf, nautical, and cruising tourism. In this aspect, the privatization of the country's leading institution, the “Simo Milosevic” Institute in Igalo, is crucial. Becoming the golf tourism destination is one of the set goals, but bearing in mind that Montenegro still does not have any finished golf court yet, this seems to be slightly unrealistic for the near future. The professional golf court is being built in Luštica Bay, and one more is planned in Porto Montenegro. In sense of achieving the renown of nautical destination, two extremely exclusive ports were built: Porto Montenegro in Tivat (2009) and Portonovi in Boka Bay (2018). At the same time, the port of Kotor is registering an increasing number of international vessels (2,608 in 2008; 3,961 in 2014, and 4,598 in 2017) mainly from the Western and Mediterranean countries (UK, Italy, Germany, Austria, France, and the USA) (MONSTAT, 2009–2018a). There is an increase in the number of foreign vessels on a cruise (245 in 2008; 350 in 2015, and 430 in 2017), and passengers (50,554 in 2008; 306,397 in 2014 and 540,445 in 2017) (MONSTAT, 2009–2018b).

The improvement of infrastructure – Over the past 15 years, a lot of money has been invested in the building of new and improvement of existing road and rail infrastructure. The construction of the Niksic–Vilusi–Risan road (connection between Boka Bay, B&H, and Croatia) is especially emphasized. The tunnels Sozina (2005) and Vrmac (2007) are also important as links between coastal and continental part of Montenegro. At the same time, the Podgorica–Niksic railway was reconstructed in 2012, and the same activities are

also planned for the section Bar–Bijelo Polje towards the border with Serbia. Among the most important projects is the construction of the Bar–Boljare highway (started in 2015), expressway along the Adriatic coast as well as the “Verige” bridge across the Bay of Kotor between Herceg Novi and Tivat.

To gain the position on the European and global tourism market, one of the preconditions was opening the sky for the low-cost airlines. The first low-cost company that started to operate in Montenegro was Wizz Air from Hungary (August 2016). Since then, many similar companies came to operate at airports in Tivat and Podgorica. In this manner, the accessibility of Montenegro has been increased. There are also plans for the further modernization of aforementioned airports.

The lack of land fields is a problem that Montenegro has been faced with for a long time. The opening of the regional sanitary land fields was planned by 2010. The first regional sanitary land field in the Coast was opened in Bar (“Možura”) and it started to work in 2012 (Sekretarijat za uređenje prostora, komunalno-stambene poslove i zaštitu životne sredine, 2016). In the other centers the waste has been disposed of in the illegal, disorganized or contemporary land fields (e.g. Tisova grade in Herceg Novi; Lovanja in Tivat). This similar situation exists with respect to the wastewater treatment plants. The Municipality of Budva has had a plant since 2014, while in 2016 a regional plant for Tivat and Kotor was opened. On the other hand, in Herceg Novi, construction has been going on since 2012. At the same time, water supply conditions for most of the coastal municipalities have been improved after the construction of the regional water supply system. The only problem is the municipality of Herceg Novi, which for technical reasons is still supplied from local water sources and the Trebišnjica–Plat system.

CONCLUSIONS

Even though Montenegro has a long tradition in tourism, it does not have a competitive position on the global tourism market. The main reasons for this situation are: high seasonality, with the emphasis on the few summer months; the majority of accommodation is unregistered private houses and apartments, lack of unique tourist product that is very important to attract international tourism demand. Furthermore, other issues are present, such as illegal construction, waste management problems, especially in the coastal region, and inadequate transport infrastructure. Besides, current tourism in Montenegro depends on demand from several countries in the region. The citizens of these countries do not have high financial power, so their daily expenditure is very low. This is the reason for choosing private houses for accommodation, which are mostly uncategorized and unregistered.

The current state of Montenegrin tourism implies that some goals defined in the planning documents are partially achieved (e.g. water supply, waste management, road improvements, etc.). On the other hand, becoming an exclusive

tourism destination, one of the main goals, seems to be still unrealistic in the near future. Notwithstanding there are several high-class hotels recently built on the coast, they still make the smallest share in the accommodation structure. To achieve this goal, it is necessary to solve the basic issues, like finishing the regional water supply, moving illegal land fields and raise the awareness for the environment preservation. Besides, to become year-round tourist destination it is necessary to promote tourist clusters in Northern Montenegro. The objectives stated in the Touristic Masterplan for Montenegro and Montenegro Tourism Development Strategy to 2020 were defined very optimistic, not considering all the obstacles that tourism stakeholders might be faced with. All the goals might be achieved in the future, but not in such short period, considering the long tradition of a socially affordable summer destination.

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