SUSTAINABLE TOURISM INDICATORS AND DESTINATION MANAGEMENT

Regional Workshop
Kolašin, Montenegro, 25-27 April 2007

FINAL REPORT
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*Foreword by Mr. Predrag Nenezic, Minister of Tourism and Environment of Montenegro*

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The close involvement of the Austrian Montenegrin Partnership for Bjelasica and Komovi added greatly to the workshop’s success and we are especially grateful to Gorica Bojic, Project Manager, for the time she devoted to it.

The UNWTO team of experts facilitating the workshop included:
- Mr Gabor Vereczi, UNWTO, Sustainable Development of Tourism Department
- Dr Richard Denman, The Tourism Company, UK
- Mr Christoph Stein, WWF Mediterranean Programme

The report was prepared by Richard Denman, with input from Gabor Vereczi and Christoph Stein on the working group results. The document was edited by Gabor Vereczi.

Photos: Gabor Vereczi (on the cover: the lake at Biogradska Gora National Park)
Dear Fellow Citizens,

Within the confines of our national borders on a land surface under 15,000 km², our small Nation has some of Europe’s most spectacular environments in the Land of “Wild Beauty” to discover and enjoy. For example, the Tara Canyon, Skadar Lake, and the Forest in Bjelasica, recognized as one of the oldest remaining in Europe, are comparable to the National Wonders of the World.

Encouraged by many positive feature stories in renowned Nature Travel Magazines such as Geo Season, National Geographic and Conde Nast, combined with the enthusiastic support of the World Wildlife Fund, UNESCO, UNDP, UNEP et al., with the Dinaric Arc Initiative and IUCN, the World Conservation Union with the “European Green Belt,” we know that now is the time to open up our four National Parks for Nature lovers from around the world to visit and enjoy.

In the words of our Prime Minister, the Honorable Zeljko Sturanovic, most of the Landscape of Montenegro has withstood the passage of time almost untouched, and we shall make every effort, through a balanced sustainable development, to preserve our precious natural assets for future generations and guests. At the same time we recognize that it is the local service providers and the tourism industry that is the supplier and marketer of adventures, outdoor recreational products, and promoter of unique experiences and attracting the GEO Traveler to the “Wild Beauty” of Montenegro.

Recognizing that the role of the national and municipal governments is to set the conditions for a sustainable, balanced, socio-economic driven, summer and winter tourism development program in our National Parks with a specific focus to preserve and enhance the unique set of natural diversity, we called on the global experience of the sustainable tourism development team of the UN WTO, World Tourism Organization of the United Nation, to help guide us in developing a balanced set of sustainable tourism indicators and destination management principles.

The Ministry of Tourism and Environmental and the participants of the UNWTO workshop, representing a wide audience of stakeholders, wish to express their thanks and gratitude to the experienced Sustainable Tourism Team of the UNWTO, headed by Mr. Luigi Cabrini and to Mr. Gabor Vereczki, Dr. Richard Denman and Christoph Stein, for leading the workshop, identifying the issues, preparing the enclosed report with a recommended set of baseline indicators, as well as an action and monitoring plan for developing the National Parks and protected areas in Montenegro for tourism.
The enclosed report is for consideration by all stakeholders, including national government leaders responsible for setting the stage, local citizens and their elected governments, the civil sector and the leaders of the tourism industry. Our thanks go also to the local Office of the UNDP for their assistance in translating and printing the report which will facilitate a wide distribution with the aim to promote a better understanding of sustainable tourism development principles at the economic, social and environmental level and for guiding and implementing constructive actions.

Sincerely,

Predrag Nenezic
Minister
INTRODUCTION

In April 2007 the World Tourism Organization, in conjunction with the Ministry of Tourism and the Environment of Montenegro, held a workshop on Sustainable Tourism Indicators and Destination Management in the mountain Resort Hotel Bianca in Kolašin, in northern Montenegro. This three day event was attended by some 100 delegates from the local region, elsewhere in Montenegro and seven countries of Central and South-East Europe.

Tourism has become one of Europe’s most important and fastest growing sectors. The continent is the world’s largest tourist receiving region, and is also one of the key tourism source markets. Tourism has a major impact on natural and built environments and on the wellbeing and culture of host populations, and these effects can be positive or negative, depending on how tourism is developed and managed. At the same time, the concept of sustainable development has become widely accepted as the way to a better, more humane and socially responsible future. There is a growing belief that tourism can play a significant role in sustainable development. The World Tourism Organization, in its capacity as Specialised Agency of the United Nations, encourages all countries to ensure that their policies and actions for the development and management of tourism fully embrace the principles of sustainability. In this context, UNWTO has been increasingly putting at the centre of its activities the concern for sustainability, undertaking research and capacity building activities on different aspects regarding tourism policies, and its development, management, regulation, and similar issues of public concern.

In order to ensure the long-term sustainability of the tourism sector, there is a need for effective policies and plans at all levels, especially at the local destination level, where tourism activities take place, tourists interact with service providers and with communities, and where tourism’s positive and negative impacts are most felt. Destinations represent complex situations with a wide range of attractions and activities offered, with a wide variety of local tourism stakeholders intervening from the public, private and civil sectors, affecting the environmental and socio-economic resource base of the tourism sector. For the sustainable development of tourism destinations there is a need for a coordinated effort between all interest groups, through systematically developed and implemented management plans.

UNWTO’s Sustainable Development of Tourism Department has developed a range of technical guidelines and manuals for sustainable tourism policies, with practical tools for destinations. Among these, indicators are essential instruments in the tourism planning, management and monitoring processes, providing accurate information for decision-making.

The Workshop on Sustainable Tourism Indicators and Destination Management in Montenegro led participants through hands-on exercises in order to experience the use of practical approaches to the identification of indicators in the context of destination management. The Bjelasica and Komovi region, with the Biogradska Gora National Park at its centre, served as a pilot destination to demonstrate a participatory planning process and the application of indicators, through field exercises and working groups with the involvement of national and local stakeholders, led by the UNWTO experts. The workshop methodology was designed in a way that can be replicated and adapted to other locations.
The importance of indicators in the sustainable development of tourism destinations

UNWTO has been conducting research and capacity building activities in the field of sustainable tourism indicators for more than a decade. The essence of the indicators program of UNWTO is risk management and provision of critical information to those in planning and management so that they can anticipate and prevent unacceptable and unsustainable outcomes. Better information through indicators provides the ability to define risks to key assets, to communities, to the values most important to the communities and tourists, and the levels of preparedness of destinations in the event of problems or as a means to anticipate and prevent them. The UNWTO Guidebook on Indicators of Sustainable Development for Tourism Destinations (2004) is designed to help identify key issues and the indicators which can help managers respond effectively to them and sustain what makes a destination viable and attractive.

Indicators are defined as “measures of the existence or severity of current issues, signals of upcoming situations or problems, measures of risk and potential need for action, and means to identify and measure the results of our actions. Indicators are information sets which are formally selected to be used on a regular basis to measure changes that are of importance for tourism development or management.” (UNWTO Guidebook, 2004 p8). Used properly, indicators can become key management tools – performance measures which supply essential information both to the managers and to all of the stakeholders in tourism. Good indicators can provide in-time information to deal with pressing issues and to help guide the sustainable development of a destination.

At each tourism destination there exist certain data and information that can serve as sustainability indicators if their relevance is understood. Tourism professionals work regularly with indicators. The most commonly used and understood indicators are volumetric, including tourist arrivals, overnights spent, and accommodation capacities, or economic, such as tourism revenues and expenditures. These are reference points for business decisions and for ongoing management of the industry. There are many existing indicators that can be used as sustainability indicators, when their relevance to sustainability issues is understood. For example, the number of tourists, a baseline figure, can be considered a sustainability indicator, when it is related to infrastructure capacity at a certain site (e.g. the airport) or to measure tourist response to efforts to change use patterns.

Some of the benefits from good definition and use of indicators can include:
- better decision-making - lowering risks or costs
- identification of emerging issues - allowing preventative action
- identification of impacts - allowing corrective action when needed
- performance measurement of the implementation of plans and management activities – evaluating effort and progress
- greater accountability – providing credible information for wise public decision making, widely accepted
- constant monitoring – leading to continuous improvement and building solutions into management.
2 SUSTAINABLE TOURISM IN MONTENEGRO AND THE BJELASICA AND KOMOVI REGION

The context of the workshop was provided by the evolving strategies for the development of sustainable tourism at a national and a regional level and by the aspirations and challenges faced by the five municipalities that make up the study area. This chapter summarises briefly the key points identified by the UNWTO from their assessment of existing reports and discussions with local stakeholders during two days of consultation in advance of the workshop.

2.1 National strategic framework

A number of documents have informed the development of tourism in Montenegro. All reaffirm the importance of embracing sustainability in shaping tourism growth, but there is some variation in the level of emphasis placed on this and the identified consequences for product development and promotion.

The national Masterplan for Tourism Development, 2001, is essentially a plan for growth. It recognises the importance of a high quality environment for the performance of the tourism sector and points to problems in Montenegro in this regard, notably excessive visible waste and uncontrolled spread of building. It calls for early action to address this. The plan sets out ways in which quality can be improved and Montenegro can be established as a truly distinctive destination, yet it pays more attention to the coastal area than to the northern and mountainous regions. The Masterplan is currently being renewed. The new plan is likely to place greater emphasis on sustainability and on delivering a diversified product and geographic spread, including the development of rural and activity tourism in the mountains.

The Economic Reform Agenda for Montenegro 2004 – 2007 recognises the critical importance of tourism to the economy. It sets out a well balanced approach to tourism, including support for appropriate sustainable tourism development in the north of the country.

It is important to note that Montenegro has recently developed a National Strategy for Sustainable Development which is cross-cutting and should be taken into account by all sectors.

2.2 Regional Tourism Strategy and implementation in Bjelasica and Komovi

A regional tourism strategy has been drafted for the study area – Bjelasica and Komovi. This was drawn up in 2005 by the Austrian – Montenegrin Co-operation Project (AMCP) based on numerous thematic workshops involving 100 stakeholders from the five municipalities. This strategy is now being reviewed and integrated as part of the Masterplan update to establish Montenegro as an ecotourism, mountain biking, hiking and adventure tourism destination.
The strategy is based on an extensive assessment of the area’s strengths and weakness, identified visitor patterns and suggested target markets. The UNWTO expert team concurs with this, through the preparation of the workshop case study.

The strategy refers to ‘sustainable tourism’ as the leading principle. It focuses on summer tourism and "soft adventures" alternative to ski tourism in winter time, partly because development associated with ski tourism has aspects with questionable sustainability considering environmental and economical aspects. It identifies the ‘top offer’ for the area as the Biogradska Gora National Park and activities associated with this (linked also to other National Parks in northern Montenegro), plus specific opportunities for rafting, hiking and experiencing the canyons. This should be supported by quality facilities, including hotels with leisure infrastructure, agro tourism (including in the traditional mountain huts, the katuns), regional cuisine, and additional activities such as mountain biking and fishing.

The strategy contains an action plan and the AMCP has taken various steps to support its implementation. A Regional Tourism Organisation of Bjelasica and Komovi has been established, which is pursuing a number of activities in the area of marketing and communication. Projects in the National Park include thematic walks, guide training, an information centre, a watchtower and renovation of bungalows. Specific projects are also being pursued to improve and develop mountain tourism (hiking, climbing, snow shoeing etc.) and certain other outdoor activities. Local sustainable development is being assisted through supporting projects identified by Local Agenda Groups. Additional projects aim at identifying local producers and improve linkages with the tourism supply chain.

The AMCP is also addressing sustainable regional development. In particular it has recognised the urgent need to improve land use planning and development control. The project is therefore taking a leading role in the development of a Regional Spatial Plan for the area.

2.3 Local perspectives

Interviews undertaken by the UNWTO team with the five municipalities in the area, including some private sector interests who were invited to the meetings, revealed the following local perspectives of relevance to future strategic priorities and sustainability indicators.

Recognition of changing market and product base

The last 15 years have seen considerable market changes, from organised mass tourism in the time of the former socialist regime to a period of virtually no tourism and now some signs of growing interest in more diverse tourism activities for small groups, individuals and specialized tour operators. The quality, nature and scale of the product base, notably accommodation, has not yet adequately adjusted to meet these changes. More investment is needed but there is still uncertainly about what this should be and where it may come from.

Inadequate knowledge of tourism product and performance

Although official statistics show records of bedspaces and visitor arrivals it is believed that they give an inaccurate picture of the actual situation. Many properties providing visitor accommodation are not registered. Occupancy levels at accommodation establishments are uncertain.
Diverse opinions on the value of the National Park

Local officials have a mixed reaction to the Biodradska Gora and other National Parks. Some feel that tourism and the municipality receive very little benefit from the Park because they cannot observe a direct income flow from this resource. Others recognise that the presence of the Park and the protection of nature is very important as it provides a tourism draw and therefore contributes to the wider local economy. There is a need for improved appreciation of these relationships.

The need to develop a diversified regional tourism product

Most municipalities expressed very similar or identical ideas for the development of tourism activities and products: fishing, rafting, hiking, katuns and ski tourism. There is a need to further explore the specific attractions and tourism potential of each municipal area, and better link them in order to create a diversified regional tourism product where the municipalities cooperate and compete with each other based on their distinguishing features. There is a special need to better integrate the rich tangible and intangible cultural heritage of the region, where each municipality has some distinguishing features.

Adherence to previously identified ski development proposals

Most municipalities point to projects for extending or developing ski tourism in their areas which they wish to see implemented. While there is potential for this type of tourism, it will be important to assess accurately market demand, develop the facilities through great care for the environment (apply effectively the existing environmental impact assessment regulations), and use them to support both winter and summer tourism (skiing, hiking and sightseeing). There is an interest amongst the municipalities in the further development of summer (or year round) tourism based on hiking, outdoor activities and the enjoyment of nature. Some operators are already engaged in this, with varying degrees of quality and success.

Concern about environmental degradation

Problems of environmental degradation, including the adverse impact this can have on tourism, are widely recognised. In all municipalities, these include strewn litter and other aspects of waste and pollution, cutting of timber, and the poorly controlled spread of building development.

2.4 The current approach to measurement and indicators

The main measures of tourism performance used in the country are tourism capacity (number of beds) and volume and value (number of overnights and revenue). A recent study, developed through the World Travel and Tourism Council, reveals economic impact measures and aggregate results on employment and GDP share of tourism, capital investment and government expenditure, among others. The national Tourism Masterplan (2001) contains targets for bedspace capacity, overnights and spend for 2010 and 2020. These figures are also used as a basis for projections for Bjelasica in the Programme for the Development of Mountain Tourism in Montenegro (2005). This presents a scenario of beds in the area increasing from 3,150 to 10,500 between 2010 and 2020, with nights and revenues increasing at a slightly faster rate to 1.4m nights and 71.1m Euro. The plan estimates that this growth will support approximately 3,750 jobs.
The current source of information appears to be the Statisticki Crne Gore (MONSTAT), the official statistics office, based on registrations of accommodation and visitor nights. The masterplan makes adjustments for overnight stays in private vacation dwellings. Discretionary expenditure outside of accommodation is not included. Broad assumptions are made about occupancy levels and average productivity to arrive at the performance figures. Generally, the performance indicators and targets are not based on comprehensive and robust data and other aspects of sustainability are not measured.

The AMCP Tourism Strategy for Bjelasica and Komovi does not contain quantified measures and targets for tourism performance nor other indicators of tourism sustainability. However, the project has recognised the need for better data on visitor flows and visitor response. In 2005 and 2006 visitor counts were undertaken at the main attractions and visitor books on the mountain peaks were analysed. In addition, visitor surveys were undertaken in the different municipalities, which provide data on market profiles and measures of satisfaction with different facilities and attributes.

The UNWTO approach to indicator selection and use can be applied in destinations where there is no existing tourism plan and in destinations, such as Bjelasica and Komovi, where a plan already exists. In the former situation, indicators should be built in to the planning process from the outset. In the latter, indicators can be introduced to add focus to the plan and help to determine progress and success with its implementation. This is explained in more detail in the box below.

**Relationship of indicators to the planning process**

The sustainable development of tourism destinations requires a sound planning process, as well as continuous management of the key elements that support tourism and its destinations. (e.g., maintenance of assets, involvement of the community, involvement of tourism in the planning process for the destination) Indicators are an intrinsic component of the planning process.

**Where no tourism plan currently exists**

- Where no plan exists that includes tourism, the procedure by which indicators are developed is analogous to the first step in plan development. Both involve the identification of the key assets and key values associated with the destination. Both normally involve the assessment of the actual problems, current or potential impacts or risks associated with development, as well as documentation of the major current or expected trends or events which may affect these.
- An indicators study can be the catalyst for development of a formal plan or planning process, beginning with identification of potential issues (pollution, loss of access, impacts of development in other sectors). Response will likely require some form of plan or management procedure.
- An indicators exercise can help identify key elements that must be included in plans, such as the resource base for the industry, or risks to the assets or product.
- Performance indicators can be defined relative to the specific goals and targets of the plan. Each specific development project can integrate performance indicators in order to measure the success of management actions in the implementation phase. This information will serve to decide whether corrective actions are needed and also can provide a tool for continuous monitoring.
- Indicators defined to analyse actual environmental and socio-economic conditions at the initial phase of the planning process can became performance indicators in the implementation phase. For example, indicators determining the actual state of seawater quality at beaches or actual levels of community income from tourism will serve later on to measure achievement relative to these goals.
Where there is a tourism plan

- An indicators study can assist in evaluation of current regional or tourism plans to determine whether all of the key risks to sustainable development of tourism are covered.
- The indicator identification exercise can be applied to already defined problems, issues and objectives to improve the provision of accurate data and information where needed.
- Where no monitoring system or performance measures are included in an existing plan, the indicators development process can assist in identifying and clarifying key areas where performance measures are needed.
- Indicators discussions can often stimulate greater precision in redefining goals and targets.

Indicators as tools for public information and education

- Within and outside of the planning process, indicators are a form of education tool - helping to highlight key concerns for public information.
- The results of indicators use may well foster demands for action - and lead to public support for more inclusive planning procedures to protect and sustain the key values in any destination.

Source: Indicators of Sustainable Development for Tourism Destinations, UNWTO, 2004
The workshop spanned three days. The first day involved some introductory presentations followed by field visits. This chapter contains a short summary of them. The remaining two days of the workshop involved working group sessions, the output of which is presented in subsequent chapters.

3.1 Presentations by the UNWTO team

Following welcoming remarks by the Ministry of Tourism and Environment, UNWTO and Kolašin Municipality, the first three presentations provided an international context on tourism sustainability and the use of indicators.

Tourism trends and sustainability

Mr. Luigi Cabrini, UNWTO Regional Representative for Europe

International tourist arrivals have seen almost uninterrupted growth since 1990, averaging 4.5% per annum, with a forecast of 1.6bn arrivals by 2020, twice the current volume. Europe still accounts for 54% of the world total. The UNWTO believes that the world tourism industry has entered a new phase of its growth: more moderate, more solid and more responsible. The continuous expansion of tourism underlines the need for sustainable development in the tourism sector. UNWTO has provided various guidance on this process, including a comprehensive publication *Making Tourism More Sustainable*, A Guide for Policy Makers, which articulated 12 aims for sustainable tourism, embracing economic, social and environmental challenges. Sustainability should be integrated into all forms of tourism, including mass tourism and special interest segments. In order to achieve this, sustainability indicators should be identified, which are a prerequisite for sound decision making, risk prevention and effective adaptive management. The work of the UNWTO in this field reflects the recognition of the potential of sustainable tourism development by the UN Commission on Sustainable Development in 1999 and by various resolutions and declarations since that time. In 2007 the UNWTO is placing a special emphasis on the issue of climate change and its considerable implications for tourism.

Sustainable tourism policies and tools

Dr. Richard Denman, Expert of UNWTO and the European Tourism Sustainability Group

The current consultation document of the EU on tourism sustainability has identified three spheres for action, leading to sustainable destinations, sustainable businesses and responsible tourists. Coordinated action to address the impact of tourism can best occur at a destination level, requiring a multi-stakeholder partnership to agree upon, and implement, a comprehensive sustainable tourism strategy and action plan. There are many examples in Europe where this has been achieved in destinations with national parks at their core. Dr. Denman outlined the various stages of preparing a sustainable tourism strategy and where the use of indicators fits into this. He went on to describe a set of tools that can be used in tourism development and management to affect more sustainability. Amongst these, sound land use planning, backed by development control powers, is critical in preventing the forms of development that can destroy the very environment that tourists come to enjoy. The uncontrolled spread of low quality building on the Albanian coast serves as an example. Other instruments include the application of financial assistance and incentives, and the identification of standards and certification of
businesses that adopt good management practice. There is evidence that tourists are becoming increasingly conscious of environmental quality and management in selecting their destination and a lot can be achieved by more effective information and marketing in this field.

The application of sustainable tourism indicators for destination management and monitoring

Mr. Gabor Vereczi, Deputy Chief of UNWTO’s Sustainable Development of Tourism Department

Policy makers and managers in tourism destinations have to tackle a wide range of issues. It is broadly true that “what you cannot measure you cannot manage”. Sustainability indicators are information sets which are formally selected for a regular use to measure changes in key assets and issues of tourism destinations and sites. The identification of specific, measurable indicators helps to clarify issues and objectives and to communicate priorities and results between stakeholders. Indicators can be both qualitative and quantitative and relate to both the condition of a destination and to the actual management process itself. Mr. Vereczi outlined some of the deficiencies on the application of indicators in destinations (see box below) and the factors to be borne in mind in choosing appropriate indicators (including: feasibility, relevance, data availability, credibility, clarity and comparability). He drew particular attention the use of indicators in assessing carrying capacity (quoting the example of Malta) and in adaptive management (with an example from Sydney). Some destinations, such as Calvia in Spain, have applied indicators in a truly comprehensive way to guide tourism planning, backed by public participation and supported by a specially established observatory.

Some common deficiencies in the application of indicators in destinations

- Lack of data, inconsistency of collection (occasional time surveys)
- Monitoring activity does not cover all key sustainability issues (e.g. more focus on economic performance and indicators)
- Lack of technical capacities, qualified staff, equipment
- Lack of coordination between agencies collecting and using data (sometimes duplication), lack of involvement of private sector
- Not taking advantage of data collection and processing capacities (e.g. authorities can get support from educational and research institutions)
- Data and info available is not linked to planning and management processes, not used by relevant organizations
- Data is not processed sufficiently to support decision making (data rich and information poor situations) and communication needs

3.2 Presentations from Montenegro

Development goals and strategies in the tourism sector of the Montenegrin economy

Ms. Goranka Lazović, Advisor, Ministry of Tourism and Environment of Montenegro

Montenegro is seeking to take a leading position as a Mediterranean tourism destination based on a diverse, quality offer. Sustainability is very important in its approach, owing to the country’s highly attractive environment and heritage. Particular emphasis is being placed on the development of sustainable mountain tourism in the north, leading to strengthened investment and new jobs. The right conditions for this need to be created, including the use of appropriate indicators and benchmarks. Better quality
accommodation is needed to meet the needs of international markets, and product offers should be created which are year-round and internationally competitive. National Parks have an important role to play, providing well managed, ‘soft’ tourism. Traditional styles of building and initiatives which support distinctive local customs should be supported. Above all, the different stakeholders need to understand the sustainability issues better. Only in this way will the slogan ‘Wild Beauty’ truly reflect the reality.

**Sustainable regional and tourism development in Bjelasica and Komovi**

*Ms Gorica Bojić, Project Manager, Austrian-Montenegrin Cooperation for Sustainable Development*

An overview of the project activities was provided. It has been based around an agreed tourism strategy which sees intact nature, mountains, lakes, canyons and the national parks as the unique selling propositions. A Regional Tourism Organization has been created including the five municipalities; they are pursuing promotional activity. A set of projects, proposed locally, has been funded, including recreation areas, mountain accommodation, and environmental improvement. The National Park Biogradska Gora has been supported through the provision of various facilities and training. Visitor surveys have been undertaken and increasing attention is being paid to monitoring. Future priorities include a comprehensive programme of regional development, embracing tourism, agriculture, transport etc. and the Project is working on a new regional spatial plan. Particular attention is being paid to mountain tourism, spreading experience to other parts of Montenegro, and much emphasis is being placed on education. All these activities aim to establish Bjelasica and Komovi as a sustainable and competitive tourism destination.

**Development of the National Park “Biogradska Gora” in the context of regional sustainable development**

*Mr Darko Brajušković, Director, National Park Biogradska Gora*

The park, which covers over 5,000 hectares, has many distinctive characteristics of international importance. These include thick forest, cliffs, lakes and mountains, containing many endemic species of flora and fauna. However, it is also very accessible. It is a popular park, receiving increasing numbers of tourists in summer and further pressure is anticipated. Partly for this reason, the park has been zoned into three areas, including 1,000 hectares of total protection and 4,000 where there is some agricultural activity and access. A 16,000 hectare buffer zone is also protected from development and activities that might harm the park.

### 3.3 Field visits

Participants joined together in a field trip to the following three local facilities.

**Rafting operator on the Tara River**

This is one of a number of small activity operators in the area specialising in rafting but also providing other forms of recreation, such as trekking and canyoning. The various pieces of equipment used for rafting were demonstrated. Key points from the discussion included:

- The importance of safety procedures as a key component of offering a quality service and of great concern to international operators and visitors.
- The good level of interest of participants in the environment and biodiversity, which is pointed out by the staff accompanying the groups.
• The desire of the operator to extend his contacts with international operators – he has a few at the moment but would like this to grow.
• The recognition by the operator of the importance of the cleanliness of the river and the surrounding banks as a component of visitor satisfaction.
• A belief by the operator that the National Park should reduce the admission fees for rafting (currently Euro 60 per person for three days), although he recognises the importance of the Park to the environment. He believed that the level of fees is currently leading to congestion in locations outside the park as people are seeking to raft in places where fees do not have to be paid – currently around 20 rafts per day may be found here.
• A desire to see more marketing of the destination and activities by the authorities, including attendance at fairs etc.

Biogradska Gora National Park

Unfortunately, the weather conditions did not allow a complete visit of the park and walk through the trail surrounding the lake. Participants observed the new visitor facilities (a pier on the lake, a new souvenir shop and signs) and the Director of the park reiterated the management issues on-site which he detailed previously in his presentation.
**Savardak restaurant**

This restaurant on the outskirts of Kolašin is contained in a circular building constructed in a traditional style and using local materials. Many of the dishes are based on traditional cuisine. It is a family-run enterprise. The group talked to the owner, who raised the following points, amongst others:

- New housing development has occurred very close to the restaurant without proper planning and detracts visually from the quality of the environment.
- The restaurant is popular with both local people and tourists. A special arrangement has been reached with the Bianca Resort, which sends groups to his restaurant.
- The special circumstances of restaurants which use traditional methods and offer local dishes are not properly accounted for and recognised within the formal quality certification and classification of restaurants. This can be a disincentive to those seeking to deliver greater distinctiveness through authentic traditional cuisine. The National Tourism Organisation does, however, have a separate campaign on national cuisine, in which he participates.
- Despite his success, he does not want to expand his restaurant or open more, as he believes that by remaining at this size he can deliver quality to his customers and also retain his own quality of life.
- He could be interested in participating in the local tourism organisation but needs more information about this.

**Morača Monastery**

Located some way to the south of the study area, on the main transit route from Podgorica, the monastery is in a beautiful setting and is a popular stopping point for tourists. The property is well maintained and has an attractive picnic site, but the toilet facilities were of poor quality. There did not appear to be any information available to visitors on site other than that provided through the priests/guides. A small motel at the entrance, by the main road, was not open at the time of visit.
Discussions with the priest, who provided interpretation for the group of the church’s heritage revealed that although this is clearly an important visitor attraction, the receiving of the visitors at the monastery was motivated more by spiritual than by commercial considerations. Tourism income, for example through donations, is likely to be important in supporting the upkeep of the heritage site, yet the priest was keen to point out that the monastery was dependent on the deity for its wellbeing. Tourists appear to be seen as incidental to this, although the priests wish to provide their visitors with a spiritual experience.

**Reflections from the field trip**

Some reflections from the field visits, with implications for the development of sustainability indicators, include:

- There is a need for greater understanding of local operators and communication with, and between, them on destination management issues.
- The quality of the environment is clearly important at all the sites, requiring monitoring and control. However, the relationship between environmental quality and tourism performance is perhaps not as clearly appreciated and understood as it should be.
- Indicators purely of commercial performance may not be sufficient to predict and guide the actions of all stakeholders – individuals may have very varied value sets and motives.
- There is a need for more understanding of markets, visitor profiles, and satisfaction levels, both within the area as a whole and by individual operators.
- National and local agencies should mould their activities and support schemes to encourage local distinctiveness.
4 METHODOLOGICAL APPROACH

The UNWTO Indicators Guidebook (2004) in its Part Two suggests a detailed procedure for the definition and application of indicators. It is a phased approach, resulting in operational indicators for a destination, ideally integrated with the ongoing planning and management process and reinforcing its effectiveness. The 12 stages are set out in the box below.

<table>
<thead>
<tr>
<th>Stages in the indicator development process</th>
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<tbody>
<tr>
<td><strong>Research and Organization</strong></td>
</tr>
<tr>
<td>1. Definition/delineation of the destination.</td>
</tr>
<tr>
<td>2. Use of participatory processes.</td>
</tr>
<tr>
<td>3. Identification of tourism assets and risks.</td>
</tr>
<tr>
<td>4. Long-term vision for a destination.</td>
</tr>
<tr>
<td><strong>Indicators Development</strong></td>
</tr>
<tr>
<td>5. Selection of priority issues</td>
</tr>
<tr>
<td>6. Identification of desired indicators.</td>
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<tr>
<td>7. Inventory of data sources.</td>
</tr>
<tr>
<td>8. Selection procedures.</td>
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<tr>
<td><strong>Implementation</strong></td>
</tr>
<tr>
<td>10. Data collection and analysis.</td>
</tr>
<tr>
<td>11. Accountability, communication and reporting.</td>
</tr>
<tr>
<td>12. Monitoring and evaluation of indicators application.</td>
</tr>
</tbody>
</table>

Source: Indicators of Sustainable Development for Tourism Destinations, UNWTO, 2004

Working through the 12 stages is a lengthy and on-going process that cannot be resolved in a 3-day workshop. Therefore the workshop held in Kolašin involved a shortened exercise entailing the identification of key issues and indicators relating to them, through a participatory approach.

The workshop had a dual purpose:
- To provide training for tourism officials and experts on the identification and application of indicators for sustainable tourism development.
- To undertake a stakeholder consultation and participatory process on behalf of the pilot destination, in order to strengthen tourism management and monitoring processes there.

The workshop was based on a methodology applied by the UNWTO in various locations round the world in the last eight years. A working group technique was applied involving local stakeholders and national and international participants, which led them through a series of practical exercises, using different forms and templates, with the guidance of UNWTO experts. These components of the workshop are described briefly below.

**Destination overview and situation analysis**

At the outset, participants were invited to engage in a brief assessment of Bjelasica and Komovi as a tourist destination. This was informed by the workshop presentation and the field trip.
Participants on the field trip were encouraged to record their own evaluation of the area, from the perspective of a visitor and of a local resident. The evaluation sheet can be found in Annex A – form 1.

At a plenary session, participants identified the tourism resources, main stakeholders and policy/management frameworks in the destination. These were recorded on screen, using the Situation Analysis Worksheet (Annex A – form 2).

**Identification of key issues related to sustainability objectives**

A framework for considering sustainability issues in tourism was presented to the plenary. This was based on the 12 aims for sustainable tourism set out by the UNWTO and UNEP in their publication *Making Tourism More Sustainable, A guide for policy makers* (2005). Each one of the aims was described in turn and the kinds of issue relating it were identified.

Participants were then divided into three working groups. Initially, a half-day session was held on the identification of key issues for sustainable tourism in Bjelasica and Komovi. The working groups looked at each of the 12 aims in turn and agreed on the relevant issues in the area that related to them, using a framework worksheet (Annex A – form 3) and guidance notes (Annex B) provided by UNWTO.

The issues were written up on flipchart paper. At the end of the session, participants were asked to vote for the issues which they felt should be given highest priority, through placing coloured dots against the respective items. The dots were then counted and the scores recorded and fed back to the whole group in a plenary session.

**Identification and selection of indicators**

Each of the three working groups took two or three key issues as examples and discussed possible indicators that could be used to describe and measure the situation in the destination with respect to that issue. The groups discussed the following main types of indicators, considering the management and planning processes:

- **Status/performance indicators** (level/degree of the impact in the area currently and over time)
- **Response/management indicators** (presence and amount of action and effort aimed at mitigating impacts and improving the situation).
When considering the possible indicators, the groups discussed issues of:

**Relevance:** Who will use it and how will it influence decisions on the issue? Is it easy to understand and clear to users? and

**Feasibility:** Are there available data sources? Which organisations can provide this? What technique can be used to collect and analyse the information, and is it practical and affordable? Is data available in time series? Are there any existing standards?

The results were recorded in the Indicators Selection Worksheet (Annex A – form 4).

The deliberation on indicators and identification of those preferred by the groups were fed back at a plenary session.

**Action planning**

The working groups met again to look in more detail at the priority issues and indicators they had identified, to discuss how these should be used to influence and guide action and measure progress. This involved discussion on trends and targets and on actions taken so far and possible strengthened or new actions for the future. Additional indicators were identified to measure and demonstrate the planned management responses. An Action Plan Worksheet was used to focus the discussion (Annex A – form 5).

The results of all the above stages are presented in Chapter 5.

**Monitoring procedures**

Much of the final day of the workshop was devoted to monitoring procedures. Presentations were given by the UNWTO experts and by the AMCP on their experience of surveys of residents, enterprises and visitors, and other aspects of monitoring were discussed. A Monitoring Plan Worksheet was circulated (Annex A – form 7).

The discussion on monitoring is presented in Chapter 6.

**Conclusions and recommendations from the workshop**

In a final plenary session, participants were invited to give their reaction to the workshop and make recommendations. These are included within Chapter 7 of this report.
This chapter presents the results of the plenary sessions and working groups, based on the methodology outlined above.

### 5.1 Destination overview and situation analysis

The result of the rough situation analysis carried out during the initial plenary session is provided in Table 1.

**Table 1: Situation Analysis**

<table>
<thead>
<tr>
<th>Tourism resources:</th>
<th>Stakeholders:</th>
<th>Policy / management frameworks:</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Forests unique in Europe</td>
<td>- Local tourism organisation</td>
<td>- Tourism Strategy exists – but needs a detailed spatial or zoning plan, or area will be damaged – also waste management plan</td>
</tr>
<tr>
<td>- Rafting tours</td>
<td>- Regional tourism organisation</td>
<td>- National Strategy of Sustainable Development</td>
</tr>
<tr>
<td>- Unique scenery – smallest National Park</td>
<td>- NGO Natura</td>
<td>- Mountaineering Tourism plan</td>
</tr>
<tr>
<td>- Last primeval forest in Europe</td>
<td>- Austrian – Montenegrin Partnership</td>
<td>- Master Plan – will have a mountain tourism section</td>
</tr>
<tr>
<td>- Traditional way of life – Katuns – pure, no electricity, spring water</td>
<td>- Mountaineering Associations</td>
<td>- Law on decentralisation of local tourist organisations</td>
</tr>
<tr>
<td>- Unique monasteries – some not on tourist map and visible</td>
<td>- Private sector – service providers, operating local combined services and packages</td>
<td>- Law on National Tourism Organisation</td>
</tr>
<tr>
<td>- Area is a new destination</td>
<td>- Local municipal authorities – different functions within them (departments)</td>
<td>- Law on local self government</td>
</tr>
<tr>
<td>- Intact nature</td>
<td>- National tourism organisation connects to the regional and local organisations</td>
<td>- Local Plan for Kolašin</td>
</tr>
<tr>
<td>- Hospitality – e.g. in Katuns</td>
<td>- Ministry of Tourism and Environment</td>
<td>- Local public works programmes</td>
</tr>
<tr>
<td>- Rivers – but need to be clean</td>
<td>- Other relevant ministries: Agriculture, Economic Development, Spatial Planning</td>
<td>- Austrian – Montenegrin project tourism strategy</td>
</tr>
<tr>
<td>- Flora and fauna – a lot – can be studied</td>
<td>- National Council for Sustainable Development</td>
<td>- CBD – Convention on Biological Diversity</td>
</tr>
<tr>
<td>- Good access – road, rail, airport project in Berane: however, also weaknesses e.g. poor state of some roads and rail, and congestion on border</td>
<td>- National Park Biogradska Gora</td>
<td>- Natura 2000 list – soon to be approved</td>
</tr>
<tr>
<td>- Hiking, walking, paragliding, cycling, horse riding, souvenirs, traditional food</td>
<td>- Cycling Association</td>
<td>- Strategy for human resource development in tourism</td>
</tr>
<tr>
<td>- Air and water quality – good for city dwellers</td>
<td>- Elementary and Secondary schools</td>
<td></td>
</tr>
<tr>
<td>- Skiing facilities</td>
<td>- Academic institutions</td>
<td></td>
</tr>
<tr>
<td>- International arts colony</td>
<td>- Employment agency – e.g. for unemployed</td>
<td></td>
</tr>
<tr>
<td>- Mountaineering and trails, gazebos</td>
<td>- Farmers – selling products</td>
<td></td>
</tr>
<tr>
<td>- Forest plants – mushrooms</td>
<td>- Local population and other enterprises</td>
<td></td>
</tr>
<tr>
<td>- Fishing</td>
<td>- Caving Association</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- International organisations and donor agencies</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
The above was not intended to provide a comprehensive analysis but it served to illustrate to participants the complexity of a tourism destination and the consequent challenge of identifying sustainable tourism indicators.

It was encouraging that the participants were already placing considerable emphasis on the important natural and cultural resources of the area. They were able, between them, to identify a large number of existing stakeholders who should be engaged in tourism planning and also an array of existing strategies, policies and legislation that should be taken into account and that might benefit from the identification of indicators to guide their implementation.

5.2 Key issues related to sustainability objectives

The results of the discussions within the three working groups have been amalgamated. The main issues arising under the 12 aims for sustainable tourism are summarised below.

1) ECONOMIC VIABILITY

(Enterprise profitability – competitiveness – business conditions – access to markets)

- Transition from the former economic model is still not completed – the tourism product and business skills still reflect the past.
- Levels of international tourism and access to international markets remain limited in the area.
- There is a need to improve both international and national marketing.
- A more diversified, year-round product offer is needed – a mix of winter and summer products, including skiing, mountain tourism, hiking, mountain biking, rafting, other outdoor pursuits, and cultural experiences.
- Local investment should be supported by more favourable credit conditions – longer repayment periods and reduced interest rates.
- Access to the region and infrastructure within it should be improved.
- The tourism offer in the North of Montenegro should be linked to that in the South.

2) LOCAL PROSPERITY

(Retention of tourism income in the area and spread of economic benefits)

- Tourism is too much focussed in Kolašin – other municipalities need to be more involved.
- Local produce is not sufficiently used in the area. There is a need to strengthen links with agriculture and pursue opportunities to develop organic production. However, there are issues of hygiene regulations etc here – e.g. HACCP requirements.
- Need better access to isolated villages to enable them to benefit from tourism.
- Sizeable grey economy in tourism – ‘enterprises’ not paying taxes and so benefiting the wider community.

3) EMPLOYMENT QUALITY

(Number and quality of local jobs – pay and conditions – labour supply – training)

- Unemployment remains high – there is a need for more local jobs.
- Young educated people are leaving the area and there is a lack of qualified personnel.
- Seasonality of tourism jobs needs to be addressed in order to attract local people into the sector.
- There is a lack of locally available training in tourism through local educational establishments.
- Particular skills required include: languages; customer care; knowledge of the local area.
4) SOCIAL EQUITY
*(Directing tourism income/benefits to disadvantaged/poor people)*
- Generally salaries are low in the area and the need to focus specifically on poor or disadvantaged groups does not appear to be seen as a particular issue in the area at the moment.

5) VISITOR FULLFILMENT
*(Security and safety – quality of experience – holidays for all without discrimination)*
- General need to raise service quality – does not meet expectations.
- Need to improve safety procedures (e.g. with certain activities) to meet international standards, and to address insurance issues.
- Level of visitor information and interpretation is generally very low and sometimes is not correct. Need better information material, distribution, signposting, local knowledge.
- Many facilities are not adapted for people with disabilities.

6) LOCAL CONTROL
*(Local involvement in planning and decision making)*
- Planning and control is largely at a national level and does not take sufficient account of local conditions.
- Need more local involvement in planning and management of local resources.
- Level of budget available locally is limited. There is also a sense of more resources being available in the South of Montenegro than in the North.

7) COMMUNITY WELLBEING
*(Impacts on social structures, quality of life, access to resources)*
- House and land prices are increasing due to real estate speculations, making these resources less available to local people.
- General level of prices for goods and services is also an issue for locals.
- As yet, there are few social problems from tourists themselves (there are still too few tourists rather than too many).

8) CULTURAL RICHNESS
*(Conservation and presentation of cultural heritage)*
- Local people and tourists have too little awareness of local culture. Need better education and interpretation.
- Some traditional cultural heritage sites and objects are being lost.
- Need to preserve traditional houses and other heritage buildings which could be used for tourism.
- There are opportunities to develop/expose more living culture manifestations for tourists – events, festivals, art, music, cuisine etc.

9) PHYSICAL INTEGRITY
*(Landscape quality – physical and visual degradation – cleanliness)*
- Very considerable problem from (illegal) spread of buildings, not properly planned and destroying landscape quality.
- Need for a new spatial plan.
- Plans are not respected even when they exist – need stronger legal enforcement procedures.
- Need to reduce litter/strewn waste and improve waste disposal processes. “Let it be clean” campaign seen as good, but may need to be reinforced by penalties/fines.
10) BIOLOGICAL DIVERSITY  
*(Impact on habitats, flora and fauna – support for their conservation)*

- Most physical integrity issues (see above) relate also to biodiversity.
- National Parks have too limited resources – including staff and training.
- Forest/tree cutting affects biodiversity and landscape.
- Need better education for local people and visitors on biodiversity and threats to it.
- Hunting and illegal forms of fishing by visitors can be a threat to wildlife.

11) RESOURCE EFFICIENCY  
*(Reducing use of scarce and non-renewable resources – energy, water etc.)*

- Potential to increase use of renewable energy is recognised, including solar. However, hydro-power is a more complex issue, considering the possible impacts in watersheds and landscapes.
- Could improve levels of efficiency and environmental management in tourism enterprises (insulation, energy and water use, reduce-reuse-recycle).

12) ENVIRONMENTAL PURITY  
*(Global emissions – carbon footprint – local pollution of air, water and land)*

- Little apparent awareness/discussion of global environmental responsibility – e.g. transport emissions.
- Main pollution problem is seen as waste/litter – see above.
- Localised pollution of land and water is seen as a problem in some places, but not throughout the whole region.

Priority issues

The voting system on the issues identified revealed the following issues to be of highest priority:

1. The spread of buildings and the need for effective land use planning and development control.
2. The shortage of skilled and qualified labour for tourism.
3. The need to improve waste management.
4. The need for greater diversification of the product offer, year round.
5. The desirability of greater decentralisation in planning.
6. The need to preserve cultural heritage objects and traditional buildings.
7. The opportunity to gain more benefit from using local produce in tourism.
8. The increase in prices of land and houses, implying tourism and affecting local communities.
9. The need for improved transport and other infrastructure.
10. The need for better visitor information and interpretation.
11. The potential to use more renewable energy.
12. The benefit of providing more favourable credit facilities for local investors.

5.3 Indicators and action plans

The working groups selected six issues (two for each group) from the priority list of twelve to look at in more detail. The work entailed consideration of indicators and using these in the context of an action plan. The results are set out below.
ISSUE 1: The lack of effective planning and control over the spread of buildings

Description, observed trends to date in the issue/problem

All participants agreed that the area is threatened by the spreading of buildings which may destroy the high quality landscape and reduce the attractiveness for tourism. Such development will make it more difficult to match the marketing slogan of Montenegro ‘Wild Beauty’. The problem is manifest in buildings of poor design in inappropriate locations, and by the density of construction.

The main volume of uncontrolled development is occurring on the outskirts of settlements, spreading from them into the countryside. There is also a problem with certain ad hoc development within urban areas. A particularly negative impact, however, is occurring in the countryside itself, away from urban areas, especially in the form of ribbon development along roads. Some development is happening right on the edge of the National Park. Furthermore, a process of issuing temporary licenses for development in association with the National Park is being misused, and this can affect negatively tourism activities as well, though altering the natural areas as attractions.

According to the participants, the situation is getting worse and illegal development is occurring at a considerable pace, especially along the roads.

In addition to impact on the landscape, there are associated problems with this development, relating to waste and the provision of services.

Indicators of status and performance

- Extent (%) and location of land subject to planning and development control
- Number of formal applications for development received
- Number (or %) of applications complying with planning requirements
- Number (or %) of applications approved
- Number of illegal developments recorded by official inspectorate
- Number of reports and complaints about illegal development made by individuals
- Number (or %) of illegal buildings/owners subject to prosecution/ action to remove buildings
- Amount and location of land subject to development (illegal and legal) based on observation and mapping

Relevance of indicators

The above indicators will be relevant to:
- Central government ministries – Planning; Tourism and the Environment
- Municipalities
- Potential developers – to reinforce awareness of planning conditions.

At the moment, the problem appears to be widely recognised but not quantified. Indicators of this kind will assist with sound planning and development control and will back up positive, creative tourism development of the right kind, in the right place and using appropriate designs and materials.
Feasibility of indicators

Existing plans, notably for the urban areas, and a process of development control do exist but appear to be rather dysfunctional.

There is a building inspectorate which is supposed to record illegal construction, and there is a process for individual citizens to draw cases to the attention of the inspectorate. However, there is a problem of:

- Insufficient coverage of plans and lack of clarity
- Insufficient resources for the inspectorate to do its job
- Social pressure on individuals not to report on neighbours
- Commercial pressure on officials not to take action

These problems will need to be overcome if the indicators are to be successfully applied.

Regularly made direct observation, by eye or by the use of photography (including aerial photography) may be needed to provide irrefutable evidence and accurate awareness of the actual scope and growth of the problem.

Desired trends, targets (clearly defined), standards or thresholds to be met

Specific, quantified targets could not be established by the workshop. However, it was recognised that there is a need for a new spatial plan which sets guidance, targets and limits on the nature and amount of development in clearly defined zones throughout the whole area.

Tourism can be part of the cause of the problem, but also part of the solution. The economic gain from tourism should be used as part of the argument behind a new, sound approach to planning and development control. Media and other mechanisms should be used to get the message across that if landscape degradation continues there will be no more tourism.

Actions taken so far (results), existing regulations, policies or references

The Government has issued a law on permissions for development which will come into force in January 2008. Each permit for construction will have to be backed by integrated permissions and an Environmental Impact Assessment will be required. Applications will be need to be transparent, and every interested party will have the opportunity to object. Procedures will be published.

The Ministry of Tourism and Environment in partnership with GTZ and the Faculty of Architecture are planning several model types of traditional houses for future developments as well as models for an upscale and nature-integrated ecologdes for National Parks. Planning concepts for village development are also being established in order to guide future developments.

Expected actions to improve the situation with the sustainability issue in question (including plans to improve information collection and analysis, if necessary)

High hopes are placed on the new Spatial Plan process. The new plan should (either directly or through further development of detailed local land use plans) include:
• Establishment of a range of zones indicating level of development, including those where no development is permitted
• Establishment of planning policies on types of permitted use on the different zones and sites
• Provision of standards and regulation on building size, height, design, materials and density of development.

The follow actions has been already addressed, and can be further strengthened:
• Widespread, local consultation on the plan development
• Engagement of NGOs, including conservation bodies, in the plan development
• Clear stipulation of development control processes and requirements (including e.g. EIAs)
• Increased resources for development control inspectorate
• Media campaign, linked to tourism messages, to encourage all citizens to comply with legislation and report on illegal development
• Positive guidance on suitable building styles, including use of traditional buildings, within an information campaign. This should also cover environmentally friendly materials, energy efficiency etc.

**Indicators to demonstrate management actions**

• New Spatial Plan to be in place and adopted by 2008
• Revised Tourism Master Plan to be adopted in line with Spatial Plan by 2008
• Record of consultation undertaken for the above plans; number of submissions made
• Number of copies of development/design guidance distributed
• Number of media articles/features secured.
ISSUE 2: The shortage of skilled and qualified labour

Description, observed trends to date in the issue/problem

There is a lack of qualified labour for tourism (e.g. chefs, hotel and restaurant staff, guides). The vocational skill level is generally low and foreign language knowledge is also lacking. The shortage of qualified labour is especially notable in the high summer season, when most persons go to the coastal area to work in tourism. For many young people there is a lack of motivation and incentives to work in tourism. The seasonality of employment in tourism is also an obstacle to obtain qualified staff, given that pension and health insurance are only covered during seasonal periods and are discontinued during the rest of the year. Some entrepreneurs (hoteliers) try to provide all-year-round jobs for a core staff, by designating other types of work (e.g. maintenance) in low season. The shortage of qualified labour is not just affecting established tourism businesses but also new developments. For example, in the Municipality of Andrijevica it was impossible to find a qualified cook for the eko-katun project, and an old shepherd lady was employed finally with limited capacity to provide food service.

Training opportunities are also rather limited in the region. In Bijelo Pole the secondary school offers vocational education for tourism, and there is a training hotel and restaurant in Kolašin. There is a need for more training and re-training programmes. There is also a lack of qualified trainers for vocational education, resulting in rather low quality skills of the students finishing the programmes. Most businesses provide on-the-job training, learning by doing, as a necessity.

Indicators of status and performance

- Total number employed in the tourism sector, by sub-sectors (e.g. accommodation, restaurants, transportation, guiding, etc.), by occupations and levels
- Number and % of employees qualified/certified
- % of jobs all-year-round vs. seasonal
- Number of qualified trainers (in schools)
- Evidence of labour shortage for specific projects.

Relevance of indicators

Users of the information provided through indicators:
- Secretariat for Development in Municipalities
- Project planners
- Development and donor agencies
- MONSTAT
- Tourism agencies wanting to establish new businesses

These indicators can enable to follow employment trends and unemployment rates and evaluate whether of tourism development and investment have an impact on improving the employment situation. These are also key indicators for tourism development projects, in order to plan and justify them to development and donor agencies, as well as for impact monitoring.
**Feasibility of indicators**

There is no accurate data on employment figures, largely due to unregistered businesses, and underreporting of some registered businesses in order to avoid taxes. In Mojkovac the Municipality wanted to gather this data for a tourism development project, but it was very difficult, information and estimation was gathered through asking different persons and staff involved in businesses (not necessarily the owner). Some of the municipalities are at a rather initial stage of tourism development, and it is difficult to assess employment.

The sources of information for reported staff from registered businesses are:
- Service Pension and Disability Fund at Municipal level
- Directorate of Public Revenues and MONSTAT at the national level.

During the workshop the participants from Bijelo Pole municipality made a quick estimate of employment figures: There are 175 registered facilities (hotels and restaurants). Taking as an average 5 persons per facility, there can be around 5\times175=875 employees related to tourism.

There could be a possibility to gather information through a business survey, or deal with employment issues at meetings organized for businesses asking about qualitative trends (non-intrusive survey techniques), such as difficulties with getting quality labour, training needs, seasonality of labour, etc.

**Desired trends, targets (clearly defined), standards or thresholds to be met**

Given the lack of baseline data it is difficult to set objectives. Nevertheless discussions were held on whether is it realistic to expect that tourism employment could double in the coming mid-term period (3 years). Having the baseline data, objectives should be set through the RTO, and an employment development plan should be linked to the spatial plan to be developed. The objectives should be established in close collaboration with the tourism private sector active in the region. It was also discussed that the young RTO needs to improve its capacity and enlarge its own staff.

**Actions taken so far (results), existing regulations, policies or references**

The Tourist Inspectorate is established by the law in Montenegro. The tourism inspection is presented in each municipality and each municipality has its own tourism inspection – since all the operating licences for restaurants, private accommodations etc, are issued by the municipality. The Ministry of Tourism started a special inspection programme a few years ago concentrating on the coastal area during the high season.

A general difficulty with inspections is that they only check registered businesses, but there are non-registered private houses, and in established businesses there is unregistered staff. This can create unfair competition for registered and honest businesses. The Ministry provides incentives (e.g. flat rate, tax relieve) for private tourist accommodation and secondary residences used as vacation homes/apartment in order to encourage all businesses to register.

There has been a new tourism law established to support local tourism organizations (LTOs). According to this, from the tourism tax gathered at the municipalities 70% goes to LTOs and 30% to the National Tourism Organization (NTO).
An example was given by the participant from Bulgaria, where the Ministry of Education established a national education centre and established a list of skills for tourism for vocational training. The Ministry of Education sets targets for the number of persons to receive vocational training per tourist region in the country.

Expected actions to improve the situation with the sustainability issue in question (including plans to improve information collection and analysis, if necessary)

There is a need to establish Regional Tourism Organizations in the country and to link between national and local level (clusters) and to strengthen the capacity of the recently created RTO in Bjelasica-Komovi (train RTO staff). A specific action plan should be developed for the region through the National Human Resources Development Strategy for Tourism. At the time of the workshop this strategy had recently been finished and was in the process of official adoption. It covers legal framework, formal and non-formal education in tourism. The strategy was developed with the involvement of the Ministry of Education and Labour, and as part of it, a skill needs assessment was conducted through a questionnaire with members of the Montenegrin Tourism Association. After the formal adoption of the plan, it was expected that working groups would be established to develop the implementation actions. A specific plan could be developed for the Northern Region.

Strengthen training programmes:
- Secondary school - vocational education for tourism in Bijelo Pole
- Training hotel and restaurant in Kolasin
- Train the trainers programmes (for vocational skills, e.g. cooks)
- Establish scholarships programme (municipal staff, business employees)
- Strengthen dialogue between training institutions and trade associations.
- On-the-job training
- Establish a mobile training unit that could reach more remote areas.

Streamline registration processes for tourism businesses through extending the coastal programme/campaign to the north to facilitate the registration of small private businesses through incentives.

Indicators to demonstrate management actions

Training programmes:
- Availability of training programmes (frequency, geographical distribution)
- Number of persons applying (level of interest)
- Number of persons finishing; % finding jobs using the certificate.

Registration facilitation:
- Existence of incentives
- Number of newly registered companies and service providers; level of use of the incentives.
ISSUE 3: The need for improved waste management

Description, observed trends to date in the issue/problem

The issue concerns the need to improve waste management and recycling in the region in order to avoid the physical and visual degradation and pollution of the environment.

Currently there is no waste management plan for the Northern region, including industrial waste. Waste disposal sites have high visual impact. Litter, visible by the roadside and in tourist locations, remains a problem. Despite the current clean up campaign “Let it be clean”, residents, transit vehicles and tourists continue to drop litter. As well as having a negative impact on tourism, poor waste management is also damaging to biodiversity. In general, waste management is not given a sufficiently high priority, and not enough money is devoted to it.

Indicators of status and performance

- Total weight (kilos) of waste to landfill per month
- Ratio of weight of waste to landfill in tourist season compared with non-tourist season
- Average weight (kilos) of waste to landfill per resident
- Monthly weight of litter collected in clean up campaigns
- Observation (count) of litter on sample road stretches
- Tourist perception of cleanliness of the area (exit perception survey).

Relevance of indicators

Total volume of waste to landfill is a relatively good indication of the size of the waste problem, yet it is also important to try to estimate the contribution of the tourism sector to this. These data will be relevant to central government and municipalities in developing/improving the waste management plan. They also will show the extent to which the challenge for tourism is increasing or diminishing. Evidence on waste/litter collected does

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not indicate what is left behind. For this, observational and perception indicators and site monitoring are required.

**Feasibility of indicators**

Amount (weight) of waste should be able to be measured by municipalities. Human resources will be required for observation and survey, but the techniques are straightforward. For the observation and garbage count sample areas can be designated.

**Desired trends, targets (clearly defined), standards or thresholds to be met**

- Waste management plan for the region
- Decrease of visual impact of waste in the region
- Decrease impact on biodiversity
- Construction of regional treatment facilities
- Increased awareness of locals and tourists
- Increased budget for waste management.

**Actions taken so far (results), existing regulations, policies or references**

- Existing National Master plan
- Law of waste management
- Industrial waste sanitation in Mojkovac started
- National campaign *Let it be Clean*
- Recycling centre in Berane for the region in preparation
- Annual cleaning of Tara and Lim rivers by local NGOs.

**Expected actions to improve the situation with the sustainability issue in question** *(including plans to improve information collection and analysis, if necessary)*

- Industrial waste treatment in Mojkovac ongoing
- National campaign *Let it be Clean* ongoing
- Recycling centre Berane for the region to start in 2008
- Annual cleaning of Tara and Lim rivers by local NGOs ongoing
- Preparation of waste management plan including business plan
- Municipalities have to look for funds for implementation.

**Indicators to demonstrate management actions**

- Waste management plan adopted in 2008
- Number of cleaning campaigns completed by NGO
- Number of blue bags between Kolasin and NP entrance per year
- Number of education programmes in schools and/or campaigns dealing with waste management
- 1 recycling plant in the region
- Increase of municipality budget dedicated to waste management by 10% in the next 2 years.
ISSUE 4: The preservation of traditional buildings through tourism

Description, observed trends to date in the issue/problem

There is a very rich built heritage in the region, in forms of traditional village houses, religious buildings (monasteries, churches) and the katuns (small and temporal shepherd settlement with wooden huts, used for the summer pasturing season in high mountains). While a number of religious buildings are being restored, traditional houses are disappearing at an alarming rate, especially the katuns, due to changes in the traditional shepherd lifestyle and occupation. Three years ago it was estimated that there were around 150 old huts in katuns in process of degradation in Northern Bjelasica. Public buildings are normally protected, while many of the traditional buildings in private property are being degraded, as old people die and the buildings are abandoned. Many abandoned old buildings are dismantled to obtain building material. There is a lack of regulations and incentives for the restoration and tourism use of traditional buildings.

There are few traditional buildings used for tourism purposes (accommodation, restaurant). Apart from a few katuns which have been refurnished and used by tour operators, the rural tourism offer using traditional buildings is virtually non-existent in the region. There could be a lot of potential to develop small rural hotels, guest houses or homestays using the charming traditional buildings in areas of very high scenic value.

Kolašin boosts Montenegro’s only sabardak restaurant (traditional mountain hut). The knowledge of building these traditional huts is dying out with the older generation. The restaurant uses traditional dishes and is in popular demand.

There is a high richness of religious heritage and monuments in the region. In Bijelo Pole alone there are 12 religious buildings; 2 of them are currently being reconstructed. All religious buildings are opened for visitors. The most frequented monument is the Morača Monastery, with a well-developed picnic and rest area for visitors. Other monuments have also good potentials. For example the St. Nicolas Church in Bijelo Pole can be well-integrated in the municipal tourism offer, linking visits to the cave and the canyon.
**Indicators of status and performance**

- Number, % of buildings retaining traditional / vernacular architecture (increase/decrease through time) – number of katuns, wooden buildings
- Number, % of traditional buildings in degraded conditions
- Number, % of historic/traditional buildings used for tourism services (accommodation, restaurants, shops)
- Number, % of tourists visiting historic sites, areas, museums, other heritage attractions
- Number of monasteries prepared/open for visitors, availability of visitor services.

**Relevance of indicators**

The inventory data on preservation status and use of traditional buildings is very useful for Municipal Authorities dealing with tourism, development and heritage conservation issues. The inventory data can serve for promotion materials projecting the tourism offer, and can be used by private sector partners wishing to develop new programmes. The conservation and tourism use data can be used for projects and funding submissions aiming at cultural preservation, training, and product development.

**Feasibility of indicators**

Currently there is no comprehensive information on the number and status/condition of traditional buildings. Municipal authorities will need to make an inventory, documenting also the different building styles. Municipal representatives at the workshop suggested setting up commissions in each municipality for this purpose. For this exercise there is a need to define what a traditional house is and provide a formal recognition for the remaining buildings.

The current use of traditional buildings and huts can be mapped out through contacting local tour operators.

**Desired trends, targets (clearly defined), standards or thresholds to be met**

In light of the inventory carried out, clear targets can be defined linked with conservation, training and product development programmes.

**Actions taken so far (results), existing regulations, policies or references**

Apart from the efforts of a few TOs to restore and accommodate katuns, and restoration work done at some religious buildings, few actions have been taken so far.

Within the Austrian-Montenegrin Partnership there is a programme to rehabilitate katuns, and recently a project has been initiated to identify producers of traditional local goods and products for rural tourism development and building up the local supply chain for tourism.

**Expected actions to improve the situation with the sustainability issue in question (including plans to improve information collection and analysis, if necessary)**

- Awareness raising on the values of traditional buildings: e.g. through awards, photo contest, exhibition, featuring in media.
• Raise awareness on tourism potential of traditional buildings, through providing information on rural tourism market data and demand in Europe.
• Make periodic inventories of existing old buildings in each Municipality through special commissions established for this purpose. Document and categorize different traditional building styles.
• Create recognition for traditional buildings and establish a form of local protection.
• Establish a building style code for traditional areas for new buildings, linked with spatial planning process
• Rehabilitate mountain huts
• Make connection between traditional agricultural products and tourism – linked with the use of mountain huts, in order to provide a real cultural experience
• Provide credit facilities for the refurbishment of traditional buildings for tourism use. The new soft credit facility established especially for tourism by the Deputy Prime Minister's office can be applied. This can be combined with possible grants through co-financing. There is a need to provide better information on credit opportunities and application procedures.
• Provide assistance for feasibility studies on building rehabilitation and use in tourism
• Ensure that credit is used for rehabilitation and for tourism purposes (and not for re-building new houses)
• Establish a rural tourism association that can create a framework for marketing and booking services, as well as the coordination of capacity building and support activities.

**Indicators to demonstrate management actions**

• Existence of awareness raising programmes (frequency, number of persons participating)
• Existence of training programmes (level of participation)
• Number of persons applying for credits, % approved, used for tourism
• Existence and number of participants in a rural tourism association
ISSUE 5: The use of local agricultural produce in tourism

Description, observed trends to date in the issue/problem

This is not seen so much as a problem but rather as a missed opportunity. Use of more local agricultural produce in tourism, purchased directly by tourists (e.g. as souvenirs) or used by hotels and catering establishments, can be beneficial to local prosperity by spreading local economic benefit from tourism (increasing the size of the multiplier) and can also enhance local distinctiveness and visitor fulfilment.

Traditional agriculture is important within the economy and also in maintaining the area’s landscape and cultural richness. Tourism should seek to support this.

Currently in Bjelasica and Komovi it is very hard for visitors to find local produce to purchase. Souvenir shops do not sell locally produced food specialities. Hotels and restaurants may use local produce, but the extent of this is not known. Few restaurants indicate local produce and traditional dishes on their menus.

Indicators of status and performance

- Number (or %) of restaurants saying that they source food produce locally as first priority
- Number (or %) of restaurants with local dishes labelled on the menu
- Number of shops selling specialty local foods to visitors; variety of products and size of displays
- Number of restaurants in the current National Cuisine scheme run by the NTO, and displaying the logo
- Percentage of visitors reporting satisfaction with quality and distinctiveness of food/cuisine and whether they have purchased local produce.
- Level of sales by local farmers/food producers to local restaurants.

Relevance of indicators

The actual number of establishments using and selling local produce is a basic indicator, of relevance to:
- Ministry of Agriculture and agencies seeking to develop/expand local markets
- Ministry of Tourism and NTO in providing visitor information and promotion
- Enterprises – stimulating them to be aware of opportunities and follow the example of others.
- Feedback from visitors can help to stimulate action.

Feasibility of indicators

- Much of this can be achieved by direct observation and regular checking in restaurants and shops.
- Enterprise surveys can be used to enquire about extent of use of local produce.
- Visitor purchasing and satisfaction can be checked by adding appropriate question(s) to an exit visitor survey.
- It may be more difficult to track agricultural sales.

Desired trends, targets (clearly defined), standards or thresholds to be met
• The percentage of restaurants used by tourists which have a local dish or dishes clearly identified should increase each year, with a target of at least 75% having this.
• All visitor centres and souvenir shops should sell some local produce.

**Actions taken so far (results), existing regulations, policies or references**

The Ministry of Tourism and Environment has a project to establish criteria for branding genuine local products – Made in Montenegro project.

Projects are being pursued through AMCP to support local entrepreneurship.

There are processes for local inspection of food standards. It is felt that there may be a difficulty with local food producers meeting national hygiene standards (under the international HACCP regulations). While it is clearly important that necessary hygiene regimes are observed, it is important that regulations are interpreted realistically.

Workshop participants felt that there was a need to look at taxation with respect to local food production.

The National Tourism Organisation continues to run the National Cuisine campaign for restaurants. A small booklet is produced for tourists in a number of languages, containing information on national dishes, recipes to try, and a list of restaurants in the scheme. The list contains two restaurants in Kolašin, two in Bijelo Polje and one in Berane (with four others also in the Northern region).

**Expected actions to improve the situation with the sustainability issue in question**
(including plans to improve information collection and analysis, if necessary)

• A local food produce label should be established, based on local criteria (including definition of 'local' in sourcing) based on national criteria.
• Restaurants should be helped with the way they identify and describe local dishes. They should give the Montenegrin name but then describe the contents. Assistance should be available on translation of menus.
• Assistance should be available for farmers and food producers on traditional production methods and organic production.
• Shops in Podgorica should be encouraged to sell foods displaying the local brand label.
• A new retail outlet/shop has been built in the Biogradska Gora National Park, which intends to displays local produce. It is expected that this shop will be functioning soon and the retail opportunity will be available for producers from each municipality.
• This could partly be used as a demonstration for other retailers.
• Local food events, festivals, farmers markets etc. should be encouraged.

**Indicators to demonstrate management actions**

• Presence of a local produce brand, with established criteria.
• Number of colleges with training programmes relating to local produce – and take up of training (number attending courses).
• Number of relevant advisory visits made to restaurants, retailers and food producers.
• Amount of information (leaflets etc.) distributed on local cuisine.
ISSUE 6: The increase in land and house prices

Description, observed trends to date in the issue/problem

Workshop participants were concerned about the increasing in prices of land and housing and the problems this for caused local people, affecting community wellbeing. It was believed that this was partly as a result of land deals and speculation relating to tourism development. The problem is exacerbated by the lack of a clear spatial plan and applied regulations on construction.

Indicators of status and performance

- % annual increase in land prices on community owned land, per square metre, since 2006
- % annual increase in house prices (on total property or per square metre guide) since 2006

Account should also be taken of general price inflation rate (cost of living) and also average local salary rate, to form a comparison, and as a measure of the size of the comparative problem with land/house prices.

Relevance of indicators

- Local authorities can use the information for planning purposes
- It can be used in calculating tax revenue
- It will be useful as a guide for investors
- NGOs can use the information for lobbying and monitoring prices.

Feasibility of indicators

- It was felt that information would be easier to obtain on municipally owned land and therefore the indicator is based on this.
- Exact data may be difficult to get for the sale of private property. Nevertheless regular research in regional and national newspapers as well as real estate agencies can give ideas of price trends.

Desired trends, targets (clearly defined), standards or thresholds to be met

Municipalities should agree on a detailed spatial plan with clear regulation for construction.

In general, Municipalities should try to make sure that the increase of prices of municipality owned land is not higher than average increase in salaries in the region. Clearly, there will be differentiation in the market and it is unrealistic to expect uniform property values. However, it is important that affordable housing is available for the local community.

Actions taken so far (results), existing regulations, policies or references

- The five municipalities in the region have started to work on a spatial plan
• Ministry of Tourism and Environment is working on the revision of the master plan for tourism development for the Northern region

**Expected actions to improve the situation with the sustainability issue in question**
*(including plans to improve information collection and analysis, if necessary)*

• Adaptation of new spatial plan on the region taking into consideration tourism development and prices
• Adaptation of master plan for tourism including the Northern region
• Municipalities to collect data on price increase per square metre and make it public.

**Indicators to demonstrate management actions**

• New spatial plan adopted by 2008
• New tourism master plan adopted by 2008
• By 2008 municipalities publish first price index for the region.
MONITORING AND MEASUREMENT PROCESSES

The penultimate session of the workshop was devoted to monitoring and measurement, including presentations and discussions on different approaches to adopt.

**Gabor Vereczi, UNTWO**, gave a presentation on Data Gathering Techniques. This looked again at the various types of indicators and considered the users of indicators and the various sources of information. Some key issues in assessing information gathering methods include objective, time, cost, response rate, expertise of people involved in collecting data, and the existence of comparative initiatives. A golden rule is not to assume immediately that a new set of data must be collected, but rather to consider first whether there is any data which already exists or is being collected by others. This existing data may rest with government departments, tourist associations, NBOs, research bodies etc. Beyond this, there is a wide range of methods of collecting new data. Three particular kinds include: surveys (face-to-face, postal, self-administered, telephone sampling etc.); interactive processes (focus groups, workshops, community meetings, etc.); and unobtrusive methods (traffic cordon counts, aerial photography, direct observation etc.).

Gabor also introduced some sample questionnaires and guidance for visitor exit surveys and residents’ surveys which were contained in the UNWTO Indicators Guidebook. These are reproduced in Annex C. He pointed out that a particular issue with visitor surveys is the selection of good sites which enable a representative sample to be obtained.

**Gorica Bojić, AMCP**, described the visitor census and surveys undertaken by the Project in Bjelasica and Komovi. The first aspect of the work has involved a census of visitors to calculate visitor volumes and origins. This has included collecting information from official hotel registers, admission to attractions (notably the National Park) and investigating visitor books on the mountain peaks. The second aspect has been a visitor survey, based on a face-to-face interview of a sample of 300 visitors, well distributed between the five Municipalities and the National Park, using trained interviewers. This survey was quite detailed and covered profile questions about the visitors, reasons for coming, information used, activities undertaken and levels of satisfaction with a range of facilities and attributes of the area. The presentation of the data was demonstrated by Gorica. In addition, hotels and restaurants were asked to hand cards to their guests with a few simple questions about the destination and the establishment, but it has proved quite difficult to secure active participation from the enterprises in this.

**Richard Denman**, UNWTO expert, described the enterprise surveys undertaken by his company when preparing tourism strategies in individual destinations. These surveys cover all forms of accommodation, tourist attractions and activity operators. They are normally carried out as postal (or email) surveys, and tend to achieve a response rate of between 35% and 50%. The surveys provide very necessary feedback from enterprises of assistance to destination managers, and enable indicators of performance and management practice to be monitored. They may be repeated on a regular basis (annually or biennially). A wide range of questions are included, covering:

- Business performance, including seasonality
- Employment levels
- Economic sustainability and need for more business
- Barriers to development – planning, labour supply, etc.
- Perceptions of visit markets
- Environmental management activity by the enterprise
- Engagement with local tourism associations and other groups
- Perceptions of what the destination needs
- Satisfaction with destination management and marketing.

The subsequent discussion on measurement and monitoring underlined participants’ understanding of the importance of this topic. The advantage of a comprehensive and integrated approach was recognised, as may be achieved by a dedicated tourism observatory (as in the example of Calvia, Spain). There is a need for good presentation of results, through different graphic techniques. The need for effective communication of results was also stressed, such as through the media, internet and newsletters. In some destinations, information (for example on environmental quality) is displayed in public places for visitors to see.
CONCLUSIONS AND RECOMMENDATIONS FROM THE WORKSHOP

In the final session of the workshop, participants discussed their reaction to the event and a way forward.

The first requirement was seen as providing a mailing list of all participants, to enable future networking. It was recommended that NGOs, including those not present at the workshop, could also join this.

It was concluded that the topic of indicators and developing monitoring processes should be given a higher priority at all levels. There was a need for stronger participation by national and local government, NGOs, republic institutions etc.

There was a strong request from many participants that the work started here should be followed up. UNWTO was asked to keep in touch with this. It was suggested that a Sustainable Tourism Observatory could be established in the region. This region could be used as a model for other regions in South-East Europe.

The follow-up process and the proposed new observatory should include government, municipalities, tourism operators and NGOs. These bodies might come together and initially start by selecting a small set of priority indicators to measure, which could then be built up each year.

The importance of engaging the private sector was stressed, bearing in mind that they are responsible for much of the delivery of tourism on the ground. It was suggested that a separate meeting aimed explicitly for the private sector might be held.

Participants from other countries at the workshop were asked for their reaction to it and whether they thought the approach could be applied in their countries. The responses were as follows:

- Kosovo. There is an attempt to try to develop tourism in Kosovo. The discussions on indicators and data collection were relevant and it could be helpful to have a workshop in Kosovo.
- Bulgaria. The workshop was useful and indicators could be applied more actively in Bulgaria, including linking this to surveys of municipalities.
- Albania. The workshop was helpful in suggesting new ideas, However, it was perhaps too ambitious in what it was trying to cover. It would be important to keep things simple in the Albanian context.
- Hungary: A similar exercise on indicators is underway, linked to the new tourism strategy. For the new European funding there will be sustainability indicators applied, involving destinations and development projects.
- Romania: The workshop was informative. Sustainable tourism indicators are a new concept, but we will report back and recommend the approach and methodology.

Warm thanks were offered to all those involved in running the workshop and to the participants for attending.
Following the workshop, the Ministry of Tourism and Environment of Montenegro has raised with UNWTO their interest in establishing baseline indicators for tourism development in the mountain region.

The workshop was primarily about demonstrating processes in indicator selection; it did not set out to establish a comprehensive indicator set for the region. It was also pointed out that to do so requires a phased approach, with the necessary time and resources (see the beginning of Chapter 4, above). However, based on the workshop and existing material, there is a possibility to provide some pointers for the Ministry in developing a baseline indicator set.

UNWTO particularly encourages the Ministry to look in depth at the Guidebook on Indicators of Sustainable Development for Tourism Destinations (UNWTO 2004). This contains a full compendium of relevant sustainability indicators with suggestions on associated data collection. Particular attention is drawn to the set of 29 baseline indicators identified in that publication, which are seen as of key relevance to most destinations. These are reproduced in Annex D. However, destinations are encouraged also to review and supplement this set according to their specific circumstances. The guidebook also provides a commentary of issues and indicators which may be of particular relevance to mountain destinations (see Part 4, section 4.5).

A further set of indicators which may be of value to the Ministry has been provided by the European Tourism Sustainability Group (TSG) in their report of 2007. This is also reproduced in Annex D. 50 indicators are contained here, of which 26 are flagged up as core indicators.

Based on the field visits by the UNWTO expert team in Bjelasica and Komovi and the deliberations at the workshop, the team suggests that the Ministry may wish to pay particular attention to indicators relating to the following issues.

**Tourism volume and value, including seasonality**

Basic measures of tourism flows are important in planning and provide a fundamental building block in understanding sustainability. This can be covered by indicators based on:

- Accommodation stock – action is needed to estimate capacity in non-registered as well as registered accommodation.
- Accommodation occupancy – an increasing proportion of enterprises should be encouraged to supply records of visitors and occupancy.
- Visitor flows at key attractions and other sites, based on census counts and sampling at different times of year.
- Traffic counts on roads, comparing flows across the season

The UNWTO Baseline indicator group contains indicators on seasonality. The TSG indicators numbers 1 to 4, 8 and 9 are particularly relevant here.
The census and sampling activity undertaken by the AMCP in the study area could be rolled out more widely.

**Employment in tourism**

This issue affects tourism sustainability in two directions – gaining economic benefit for local communities from tourism, and ensuring sufficient, quality labour supply for the tourism sector. Both aspects appear to be relevant to the mountain region and the issue was identified as a priority in the workshop, leading to recommendations for indicators contained under Issue 2 in Chapter 5.

The UNWTO Baseline indicators include employment under economic benefits, and the TSG indicators 16 to 19 are relevant here.

**The impact of development on the environment and communities**

This was raised as an issue of highest concern at the workshop and is likely to be relevant across the whole of the northern region. It relates primarily to visual intrusion and landscape degradation but there are also associated issues of biodiversity impact and pollution, and of wider effects on local communities including through rising land and house prices. Indicators were suggested at the workshop (See Issues 1 and 6 in Chapter 5).

The issue of development and indicators associated with measuring impact and the extent of control, is covered in the UNWTO baseline indicators under Development Control, and also in the TSG set (Indicators 36 to 38)

**The conservation and valorisation of cultural heritage**

This appears to be a particular issue in northern Montenegro, to be seen as much as an opportunity as a problem to be addressed. The specific aspects thrown up at the workshop were conservation and use (for tourism) of heritage buildings, and the use of and promotion of local produce. Both relate to economic as well as cultural/environmental conservation aims. Indicators identified can be found under Issue 2 and 5 in Chapter 5.

This issue is referred to in the UNWTO Guidebook and relevant indicators are suggested there, but it is not listed amongst the fundamental baseline indicators for destinations in general.

**Solid waste management**

There appears to be significant awareness of this issue in the region, covering both general levels of waste for tourism and other activities, and the degradation of the environment caused by strewn litter. It was covered in the workshop, with indicators reported under Issue 3. It is also a topic that is regularly identified as a priority in other destinations. Both the UNWTO baseline list and the TSG indicator set (Indicators 24, 25 and 33) cover this issue.

**Visitor and resident satisfaction**

Many of the issues concerning tourism impact and sustainability relate back to the need to enhance visitor satisfaction without detriment to the environment and local community. A
number of indicators can be built around monitoring visitor response, through regular visitor surveys, and seeking feedback on residents’ attitudes to tourism (often also through systematic surveys). This should be borne in mind by the Ministry in determining their indicator set. Again, the experience of the AMCP here is relevant to the rest of the northern region.

The UNWTO baseline list includes indicators on sustaining visitor satisfaction and on local satisfaction with tourism. There are also a number of TSG indicators in this field (20, 21, 41 and 42).

Other indicators

The UNWTO and TSG lists contain many other indicators of considerable importance to destinations worldwide, including energy use, water use, and pollution of air and water. These are of relevance to the northern region but are perhaps of slightly less importance than those indicated above, according to the evidence of the workshop. Nevertheless, the Ministry is encouraged to look at them and make their own assessment based on local consultation.
ANNEX A: FORMS

Form 1 - Field visit evaluation sheet

Opinion of visitors: please provide your own opinion, by checking the appropriate box, if you are not from the field visit area, or ask the opinion of a tourist if you reside in the field visit area:

<table>
<thead>
<tr>
<th>Features</th>
<th>very bad</th>
<th>bad</th>
<th>OK</th>
<th>good</th>
<th>excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access (transportation, infrastructure, roads)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appearance of built environment (buildings, streets, signs)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Condition/preservation of natural environment</td>
<td></td>
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</tr>
<tr>
<td>Cleanliness of the site</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Availability and variety of tourism services and programmes</td>
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<tr>
<td>Quality of tourism services</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Uniqueness and distinctiveness of attractions and services</td>
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<tr>
<td>Availability of tourist information (on site features, programmes, etc.)</td>
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<tr>
<td>Friendliness/hospitality of local people</td>
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<tr>
<td>Level of safety/security</td>
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</tbody>
</table>

Opinion of residents: please provide your own opinion by checking the appropriate box, if you reside in the field visit area, or ask a local resident on his/her opinion if you are not from the area.

<table>
<thead>
<tr>
<th>Statements</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neutral</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism is good for my community</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I personally benefit from the tourism industry</td>
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<td></td>
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<tr>
<td>Tourism creates jobs for local residents</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourism raises prices for goods and property</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Tourism harms the environment</td>
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<tr>
<td>The community has control over tourism</td>
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<tr>
<td>Tourism restricts the community in the access to environmental resources</td>
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<td></td>
</tr>
<tr>
<td>(forest, water, energy, game)</td>
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<td></td>
<td></td>
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<tr>
<td>Tourism helps stimulate local culture and crafts</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### ANNEX A: FORMS

#### Form 2 - Situation analysis worksheet

<table>
<thead>
<tr>
<th>Tourism resources:</th>
<th>Stakeholders:</th>
<th>Policy / management frameworks:</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Assets</td>
<td>- Government</td>
<td>- Strategies</td>
</tr>
<tr>
<td>- Attractions</td>
<td>- Private sector</td>
<td>- Plans</td>
</tr>
<tr>
<td>- Unique/distinguishing features</td>
<td>- Community</td>
<td>- Regulations</td>
</tr>
<tr>
<td>- Comparative advantages</td>
<td>- NGOs</td>
<td>- Procedures</td>
</tr>
<tr>
<td>- Strengths</td>
<td>- Development agencies</td>
<td>- Coordination structures</td>
</tr>
<tr>
<td></td>
<td>- Others</td>
<td>- Revenue generating and sharing schemes</td>
</tr>
</tbody>
</table>


ANNEX A: FORMS

Form 3 - Sustainability objective and issue analysis worksheet

12 Aims for sustainable tourism\(^1\)
(UNWTO/UNEP Guide for Policy Makers)

1) ECONOMIC VIABILITY
To ensure the viability and competitiveness of tourism destinations and enterprises, so that they are able to continue to prosper and deliver benefits in the long term.

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Description, relevance</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism volume and seasonality</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Product diversity, differentiation, providing variety of tourist experiences and services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access, tourism transport</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Viability/competitiveness of tourism businesses</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Market access and promotion</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

\(^1\) Making Tourism More Sustainable – A Guide for Policy Makers (UNWTO/UNEP 2005)
2) LOCAL PROSPERITY

To maximize the contribution of tourism to the prosperity of the host destination, including the proportion of visitor spending that is retained locally, and to reduce the leakages.

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Description, relevance</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support of locally owned businesses</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local sourcing and supply (local products)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local labour</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increased visitor staying and spending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourism's contribution to social services, infrastructure</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
3) EMPLOYMENT QUALITY
To strengthen the number and quality of local jobs created and supported by tourism, including the level of pay, conditions of service and availability to all without discrimination by gender, race, disability or in other ways.

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Description, relevance</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number and quality of employment in the tourism sector</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local labour</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Year round employment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4) SOCIAL EQUITY
To seek a widespread distribution of economic and social benefits from tourism throughout the recipient community, including improving opportunities, income and services available to the poor.

<table>
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<tr>
<th>Sustainability issues</th>
<th>Description, relevance</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment and business opportunities in tourism for women, the youth, indigenous people, poor people</td>
<td></td>
<td></td>
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<td>Others</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
5) VISITOR FULFILMENT
To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, disability or in other ways.

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Description, relevance</th>
<th>Priority</th>
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<tbody>
<tr>
<td>Visitor safety and security</td>
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</tr>
<tr>
<td>Accessibility (for senior persons and people with special needs)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist information (including interpretative programmes)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

6) LOCAL CONTROL
To engage and empower local communities in planning and decision making about the management and future development of tourism in their area, in consultation with other stakeholders.

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Description, relevance</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local participation in planning; Effective local decision making; Involvement of Indigenous, traditional communities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
7) COMMUNITY WELLBEING

To maintain and strengthen the quality of life in local communities, including social structures and access to resources, amenities and life support systems, avoiding any form of social degradation or exploitation.

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Description, relevance</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pressure from tourism on local communities (on infrastructure, natural and cultural resources), due to high volume and seasonal tourism activity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access by local residents to key local assets and services (areas, natural resources, properties, housing, goods). Shortages and deficiencies due to tourism use (especially in high season).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community Demographics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local public safety</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Respecting local values, customs and traditions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

8) CULTURAL RICHNESS

To respect and enhance the historic heritage, authentic culture, traditions and distinctiveness of host communities.

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Description, relevance</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Built heritate conservation (impacts, support through tourism)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information, interpretation, presentation and authenticity of cultural heritage (programmes, events, products)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Conserving traditional culture and customs (tourism’s impact, support to the maintenance of them) | |

Others | |

9) PHYSICAL INTEGRITY
To maintain and enhance the quality of landscapes, both urban and rural, and avoid the physical and visual degradation of the environment

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Description, relevance</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cleanliness</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality of rural and urban landscapes (impacts of infrastructure development, land use patterns, visual pollution)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use intensity of sites, congestion</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
10) BIOLOGICAL DIVERSITY
To support the conservation of natural areas, habitats and wildlife, and minimize damage to them.

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Description, relevance</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impacts of tourist and local use on flora and fauna, species population, habitat</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality of natural landscapes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visitor infrastructure in natural and protected areas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information, interpretation services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use intensity of natural areas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

11) RESOURCE EFFICIENCY
To minimize the use of scarce and non-renewable resources in the development and operation of tourism facilities and services. To promote policies and techniques to facilitate the reduction, re-use and recycling of scarce resources.

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Description, relevance</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Water use and conservation, allocation between different sectors, supply (shortages)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drinking water quality</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### 12) ENVIRONMENTAL PURITY
To minimize the pollution of air, water and land and the generation of waste by tourism enterprises and visitors.

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Description, relevance</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solid waste</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sewage</td>
<td></td>
<td></td>
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<tr>
<td>Bathing water quality (fresh water recreation areas, seawater, beaches)</td>
<td></td>
<td></td>
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<tr>
<td>Air (quality)</td>
<td></td>
<td></td>
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<tr>
<td>Noise</td>
<td></td>
<td></td>
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<tr>
<td>Environmental friendly transport</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### ANNEX A: FORMS

**Form 4 - Indicators Selection Worksheet: setting the baseline information, measuring current status and performance**

Sustainability objective and issue to be monitored:

<table>
<thead>
<tr>
<th>Possible indicators</th>
<th>RELEVANCE</th>
<th>FEASIBILITY</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Who will use it and how will it influence decisions on the issue? Is it easy to understand and clear to users?</td>
<td>Are there available data sources? Which organizations can provide this? What technique can be used to collect and analyse information, and is it practical and affordable? Is data available in time series? Are there any existing standards?</td>
<td></td>
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</tr>
</tbody>
</table>


ANNEX A: FORMS

Form 5 - Action Plan Worksheet
(using the indicators)

Sustainability objective:

Description, observed trends to date in the issue/problem (using the status and performance indicators):

Desired trends, targets (clearly defined), standards or thresholds to be met:

Actions taken so far (results), existing regulations, policies or references:

Expected actions to improve the situation with the sustainability issue in question (including plans to improve information collection and analysis, if necessary):

Indicators to demonstrate management actions:
ANNEX A: FORMS

Form 6 - Monitoring plan worksheet

(This form is designed to help define the production, use and reporting of the indicators selected)

1. Objective or issue to which the indicator responds (brief description):

2. Indicator (include precise statement of indicator)

Data source(s):

Precise method of calculation:

Intended users:

3. Logistics of indicators production:

Who will gather and process the data and information?

Who will compile the indicator and prepare it for reporting?

Frequency of production:

Confidentiality considerations:

Form of reporting (specific tables, graphs, etc to be produced, reporting in brochures, reports, website, etc.)

Costs, staff and technical facility needed for data gathering and processing. Cost of communication and publication of data.

Difficulties expected in data gathering and processing, and possibilities to improve data collection and analysis:
ANNEX B: SUSTAINABILITY ISSUES AND INDICATORS

12 Aims for sustainable tourism

1) ECONOMIC VIABILITY

To ensure the viability and competitiveness of tourism destinations and enterprises, so that they are able to continue to prosper and deliver benefits in the long term.

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Indicators of status and performance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tourism volume and seasonality</strong></td>
<td>Tourism arrivals or bednights by month or quarter (distribution throughout the year)</td>
</tr>
<tr>
<td></td>
<td>Day visitor arrivals (estimate) per month or per annum</td>
</tr>
<tr>
<td></td>
<td>Number of bedspaces (by accommodation type)</td>
</tr>
<tr>
<td></td>
<td>Occupancy rates for licensed (official) accommodation by month (peak periods relative to low season)</td>
</tr>
<tr>
<td></td>
<td>% of business establishments open all year</td>
</tr>
<tr>
<td></td>
<td>Number and % of tourist industry jobs which are permanent or full-year (compared to temporary jobs)</td>
</tr>
<tr>
<td><strong>Product diversity, differentiation, providing variety of tourist experiences and services</strong></td>
<td>Number of different attractions in or near destination (classified by type of attractions, e.g. cultural and natural heritage sites, events and festivities, leisure activities and sites, etc.).</td>
</tr>
<tr>
<td></td>
<td>Range of tourist services available in the destination (classified by tourism services type, e.g. accommodation and catering, transportation, information and guiding, conferences and meetings, etc., also classified by price ranges)</td>
</tr>
<tr>
<td></td>
<td>Use intensity of attractions and services (n. of clients and visitors per month or year)</td>
</tr>
<tr>
<td></td>
<td>Number and type of unique features, attractions, programmes</td>
</tr>
<tr>
<td></td>
<td>Existence of special (branded) local products (handicrafts, cuisine, produce),</td>
</tr>
<tr>
<td></td>
<td>% of products sold in shops produced locally,</td>
</tr>
<tr>
<td></td>
<td>Number, % of shops selling local products and crafts</td>
</tr>
<tr>
<td></td>
<td>Number % of restaurants serving typical local dishes</td>
</tr>
<tr>
<td><strong>Access, tourism transport</strong></td>
<td>Modes of transport to reach the destination (frequency, capacity, occupancy rates, price levels)</td>
</tr>
<tr>
<td></td>
<td>Length of travel from international airport</td>
</tr>
<tr>
<td></td>
<td>Number of sites and tourism services accessible by public transport</td>
</tr>
<tr>
<td></td>
<td>Availability of transportation services at the destination (by type)</td>
</tr>
<tr>
<td><strong>Viability/competitiveness of</strong></td>
<td>Cost/Price ratios (including gross margin) of</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>tourism businesses</th>
<th>accommodation, attractions, tours or packages compared to industry norms or ratios for similar products at other destinations.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Tourism revenues (growth rates)</td>
</tr>
<tr>
<td></td>
<td>• Annual profit of tourism businesses (growth rates)</td>
</tr>
<tr>
<td></td>
<td>• % of enterprises reporting growth in business over previous years</td>
</tr>
<tr>
<td></td>
<td>• The longevity of tourism businesses (rate of turnover)</td>
</tr>
<tr>
<td></td>
<td>• % of tourism businesses participating in a quality scheme</td>
</tr>
</tbody>
</table>

| Market access and promotion | • Number or % of businesses represented in different media (Internet, brochures, guidebooks, travel fairs) |
|                            | • Number of national and international tour operators serving the destination                                                    |

**Indicators of management and policy framework**

*What do we do to improve the situation, what management responses are delivered what policies are implemented to create an enabling environment?*

- Existence of an agreed and monitored sustainable development strategy or action plan, or tourism component included in regional development strategy. Rate of implementation
- Existence of marketing study and plan. Rate of implementation (marketing activities carried out)
- Existence of destination brand, and its use in different media
- Budget allocated for marketing and promotion of the destination
- Existence, number of staff dedicated to marketing activities
- Existence of tourism business support programmes (incentives, trainings), frequency, level of participation
- Existence of product development support and marketing activities for low season
- Existence of tourism business associations for cooperative marketing and management, % of businesses participating
- Existence and implementation of plans to improve transport infrastructure and access

**Indicators of perception/satisfaction of tourists and residents**

*What is the opinion of the tourists about the quality of the destination experience, and what is the opinion of locals’ about tourism’s impacts?*

- Number of returning guests
- N. of complaints received from tourists on services and programmes
- N. of complaints received from managers and business owners on marketing and business support activities

**Questionnaire based evaluation:**

- Value/price rating by tourists
- % of tourists attracted to destination because of unique features
- % of tourists satisfied with:
  - programme variety and quality of services
  - the information provided on the destination before the trip and during their stay
  - with the access and transport conditions
- % of tourists made their travel decision using the information and promotional channels developed through the destination marketing activities.
- % of tourists who would recommend the destination to others
- % of managers, business owners satisfied with support and marketing programmes
- % of managers, business owners with positive expectations of business growth
2) LOCAL PROSPERITY
To maximize the contribution of tourism to the prosperity of the host destination, including the proportion of visitor spending that is retained locally, and to reduce the leakages.

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Indicators of status and performance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Support of locally owned businesses</strong></td>
<td><strong>What is the current/baseline situation? How well/bad we are doing now and how do we progress?</strong></td>
</tr>
<tr>
<td>• % of businesses owned by local residents, nationals or foreigners</td>
<td></td>
</tr>
<tr>
<td>• % of licensed operators run by locals</td>
<td></td>
</tr>
<tr>
<td><strong>Local sourcing and supply (local products)</strong></td>
<td></td>
</tr>
<tr>
<td>• % and value of products purchased locally by tourism businesses and facilities</td>
<td></td>
</tr>
<tr>
<td>• % and value of local products and produce sold to tourism facilities and businesses</td>
<td></td>
</tr>
<tr>
<td>• Number of tour operators working with local service providers, guides, etc.</td>
<td></td>
</tr>
<tr>
<td>• Number of shops selling local products and crafts</td>
<td></td>
</tr>
<tr>
<td><strong>Local labour</strong></td>
<td><strong>• % of jobs occupied by local residents (by types and levels – unskilled, skilled)</strong></td>
</tr>
<tr>
<td><strong>Increased visitor staying and spending</strong></td>
<td></td>
</tr>
<tr>
<td>• Average length of stay</td>
<td></td>
</tr>
<tr>
<td>• Total local spending generated by tourism</td>
<td></td>
</tr>
<tr>
<td>• Average spending per tourist</td>
<td></td>
</tr>
<tr>
<td><strong>Tourism’s contribution to social services, infrastructure</strong></td>
<td></td>
</tr>
<tr>
<td>• Infrastructure and social services attributable to tourism development</td>
<td></td>
</tr>
<tr>
<td>• Value of voluntary giving by tourists and tourism businesses</td>
<td></td>
</tr>
<tr>
<td>• Value, frequency of community outreach programmes by tourism businesses and operators</td>
<td></td>
</tr>
</tbody>
</table>

**Indicators of management and policy framework**

*What do we do to improve the situation, what management responses are delivered what policies are implemented to create an enabling environment?*

- Existence of tourism business support programmes (incentives, trainings), frequency, level of participation
- Existence of special brands, labels for local products
- N. % of tourism businesses with policies and practices promoting local sourcing, collaboration with local producers
- N. % of companies that has donation schemes

**Indicators of perception/satisfaction of tourists and residents**

*What is the opinion of the tourists about the quality of the destination experience, and what is the opinion of locals’ about tourism’s impacts?*

- % of local residents who believes tourism brings benefits to the community
3) EMPLOYMENT QUALITY
To strengthen the number and quality of local jobs created and supported by tourism, including the level of pay, conditions of service and availability to all without discrimination by gender, race, disability or in other ways.

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Indicators of status and performance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>What is the current/baseline situation? How well/bad we are doing now and how do we progress?</td>
</tr>
</tbody>
</table>
| Number and quality of employment in the tourism sector | • Total number employed in the tourism sector, by subsectors (e.g. accommodation, restaurants, transportation, guiding, etc.), by occupations and levels  
• Retention levels of employees  
• Average hourly earnings in tourism compared to other sectors  
• Number (%) of employees qualified/certified; |
| Local labour | • % of jobs occupied by local residents (by types and levels – unskilled, skilled) |
| Year round employment | • Percentage of jobs that are full time, full year;  
• Local unemployment rate in off-season |
| Training | • Number, % of enterprises providing on-the-job training, number of employees involved  
• Training funds spent per employee, frequency of training programmes and level of participation |

Indicators of management and policy framework
What do we do to improve the situation, what management responses are delivered what policies are implemented to create an enabling environment?
• Availability of publicly driven training programmes for human resources development in local destination or for groups of enterprises (frequency, level of participation)  
• Existence of incentives for companies to provide training  
• Number, % of enterprises offering social services for workers  
• Existence of labour regulations and standards (health, safety, social services), level of application in the tourism sector

Indicators of perception/satisfaction of tourists and residents
What is the opinion of the tourists about the quality of the destination experience, and what is the opinion of locals’ about tourism’s impacts?
• % of employees satisfied with work conditions

4) SOCIAL EQUITY
To seek a widespread distribution of economic and social benefits from tourism throughout the recipient community, including improving opportunities, income and services available to the poor.

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Indicators of status, and performance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>What is the current/baseline situation? How well/bad we are doing now and how do we progress?</td>
</tr>
<tr>
<td>Employment and business opportunities in tourism for women, the youth, indigenous people, poor</td>
<td>• % of women, youth, indigenous people, people living below poverty thresholds (international, national) of all tourism employment and of all</td>
</tr>
</tbody>
</table>
Indicators of management and policy framework
What do we do to improve the situation, what management responses are delivered what policies are implemented to create an enabling environment?
- Availability of publicly driven support programmes and incentives for the inclusion of women, youth, indigenous and poor people in tourism activities and businesses
- % of operators who have regulations/commitments regarding equal employment opportunities, or support schemes for disadvantaged groups

Indicators of perception/satisfaction of tourists and residents
What is the opinion of the tourists about the quality of the destination experience, and what is the opinion of locals’ about tourism’s impacts?
- % of local residents satisfied with employment, business opportunities, with the availability of support programmes

5) VISITOR FULFILMENT
To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, disability or in other ways.

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Indicators of status and performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitor safety and security</td>
<td>Number of incidents (per month, per annum, per types of incidents) involving tourists</td>
</tr>
<tr>
<td></td>
<td>Number of incidents reported in local and international press</td>
</tr>
<tr>
<td></td>
<td>Number of tourism establishments complying with safety and security standards</td>
</tr>
<tr>
<td></td>
<td>Availability and comprehensiveness of safety and security information in different media</td>
</tr>
<tr>
<td>Accessibility (for senior persons and people with special needs)</td>
<td>Number / % of attractions and facilities (by type) with special access for people with mobility concerns</td>
</tr>
<tr>
<td></td>
<td>Existence of transportation with access for disabled people</td>
</tr>
<tr>
<td></td>
<td>Number of persons with disabilities visiting the sites</td>
</tr>
<tr>
<td>Tourist information (including interpretative programmes)</td>
<td>Availability and comprehensiveness of information on natural and cultural values of the sites in different media (brochures, guidebooks, Internet). Level of use, visitation (Internet)</td>
</tr>
<tr>
<td></td>
<td>Number of guides (total, per number of tourists)</td>
</tr>
<tr>
<td></td>
<td>Availability of interpretative programmes, number of tourists participating</td>
</tr>
<tr>
<td></td>
<td>Availability of interpretative trails, visitor centres, materials</td>
</tr>
</tbody>
</table>
Indicators of management and policy framework
What do we do to improve the situation, what management responses are delivered what policies are implemented to create an enabling environment?
- Existence of security services, level of staff, expenditure
- Existence of contingency plan and emergency services
- Existence of norms on accessibility, level of compliance

Indicators of perception/satisfaction of tourists and residents
What is the opinion of the tourists about the quality of the destination experience, and what is the opinion of locals' about tourism's impacts?
- % of tourist with the opinion that the destination is safe
- % of tourists satisfied with tourist information, presentation of sites and interpretative programmes

6) LOCAL CONTROL
To engage and empower local communities in planning and decision making about the management and future development of tourism in their area, in consultation with other stakeholders.

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Indicators of management and policy framework</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local participation in planning</td>
<td>Existence of a participatory planning process</td>
</tr>
<tr>
<td>Effective local decision making</td>
<td>Existence of a multistakeholder coordination mechanism, types and number of stakeholders involved</td>
</tr>
<tr>
<td>Involvement of Indigenous, traditional communities</td>
<td>Number of consultation events (meetings, forums) and level of participation</td>
</tr>
<tr>
<td></td>
<td>Existence and frequency of reporting and communication mechanisms on tourism issues and development results (using printed and electronic media)</td>
</tr>
<tr>
<td></td>
<td>Existence of awareness raising and training programme for local community, level of participation</td>
</tr>
</tbody>
</table>

7) COMMUNITY WELLBEING
To maintain and strengthen the quality of life in local communities, including social structures and access to resources, amenities and life support systems, avoiding any form of social degradation or exploitation.

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Indicators of status and performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pressure from tourism on local communities (on infrastructure, natural and cultural resources), due to high volume and seasonal tourism activity</td>
<td>What is the current/baseline situation? How well/bad we are doing now and how do we progress?</td>
</tr>
<tr>
<td></td>
<td>Ratio of tourists to locals (annual average, in peak season, peak days)</td>
</tr>
<tr>
<td></td>
<td>Congestion at key sites: number of tourists or vehicles at key areas, number of tourists per square meter (e.g. at beaches, historic centres)</td>
</tr>
<tr>
<td></td>
<td>Amount of revenue (e.g. from tax) raised from tourism and used for the maintenance of public areas, and infrastructure</td>
</tr>
</tbody>
</table>
**Access by local residents to key local assets and services (areas, natural resources, properties, housing, goods). Shortages and deficiencies due to tourism use (especially in high season).**

- % of tourist and recreational areas and sites freely accessible to the public
- Number of local visitors (annual, in high season)
- Cost of access (expressed in hours of local wages)
- Changes in prices of goods, properties, housing
- % of housing affordable to local residents
- Frequency and duration of shortage of goods and produce due to tourism demand (especially in high season)
- Frequency and duration of deficiencies/shortages of basic public services (water, electricity, garbage collection) in peak periods
- Number of social services available for local community

**Community Demographics**

- Number of residents who have left the community in the previous years;
- Number of immigrants (temporary or new residents) taking tourism jobs in the past year;
- Net migration into/out of community (sort by age of immigrants and out-migrants).

**Local public safety**

- Number of incidents reported
- Number of crimes reported (involving tourists)
- Number of tourists charged with crimes

**Respecting local values, customs and traditions**

- Number of incidents against local norms by tourists
- Number of incidents reported on sex tourism, exploitation of children

---

**Indicators of management and policy framework**

*What do we do to improve the situation, what management responses are delivered what policies are implemented to create an enabling environment?*

- Existence of land use planning and regulation
- Existence of congestion management measures (e.g. traffic, public transport, routes, tourist flow management)
- Existence of tourist information, codes, on local norms and customs
- Existence of incentives for local labour and business to provide year-round occupations

**Indicators of perception/satisfaction of residents**

*What is the opinion of locals’ about tourism’s impacts?*

- Number of complaints received by from local residents
- % of residents with the opinion that tourism has negative or positive impact on the community
- % of residents believing that tourism adds to the overall quality of life of the community
- % of residents who believe that tourism harms local moral

---

**8) CULTURAL RICHNESS**

To respect and enhance the historic heritage, authentic culture, traditions and distinctiveness of host communities.

---

**Sustainability issues**

**Built heritage conservation (impacts, support through tourism)**

- Number, % of buildings retaining traditional / vernacular architecture (increase/decrease through time)
- Number of traditional buildings in degraded conditions
- Number of new buildings within and around heritage areas
### Sustainable tourism indicators and destination management

**Workshop, Kolašin, Montenegro 25-27 April 2007**

**Number of historic/traditional buildings used for tourism services (accommodation, restaurants, shops)**

**% of tourists visiting historic sites, areas, museums, other heritage attractions**

**Congestion at key sites: number of tourists or vehicles at key areas, number of tourists per square meter**

**Amount of revenue generated at heritage sites and attractions (user fees, licences, retail and merchandising, etc.)**

**Amount of revenue retained for site conservation**

**Number of tourism establishments using traditional design, materials and decoration**

### Information, interpretation, presentation and authenticity of cultural heritage

**Availability of interpretive programmes, facilities and materials (e.g. guided walks, visitor centres, museums, information in printed and electronic media) number of tourists using them**

**Number of guides per tourists**

**Existence of typical local products (handicrafts, cuisine), number of shops, restaurants offering them**

**Number of cultural events, and level of attendance (by locals and by tourists)**

### Conserving traditional culture and customs (tourism’s impact, support to the maintenance of them)

**% of residents changing from traditional occupation to tourism over previous year(s); men and women;**

**Increase/decrease in cultural activities or traditional events (e.g. % of locals attending ceremonies).**

**Number or % of residents continuing with local dress, customs, language, music, cuisine, religion and cultural practices. (e.g. change in number of local residents participating in traditional events);**

### Indicators of management and policy framework

**What do we do to improve the situation, what management responses are delivered, what policies are implemented to create an enabling environment?**

- Existence of regulation, protected status designation for cultural, historic areas and sites
- Amount of revenue generated at heritage sites and attractions through tourism (user fees, licences, retail and merchandising, voluntary contributions, etc.), % used/retained for site conservation and maintenance
- Amount of funds allocated for site conservation (from different source, e.g. public funding, donors, tourism revenues)
- Existence of incentives for maintaining traditional skills, activities, events, for the production of traditional crafts, level and frequency of support

### Indicators of perception/satisfaction of tourists and residents

**What is the opinion of the tourists about the quality of the destination experience, and what is the opinion of locals’ about tourism’s impacts?**

- % of tourist satisfied with the availability and quality of cultural programmes
- % of tourist with the opinion that the cultural site is well-conserved and managed
- % of tourist who believe the sites are overcrowded
- % of locals who believe that tourism supports the conservation of local culture
- % of locals who believe tourism degrades local culture
- Level of awareness of local values (% aware, % supporting)
- % who are proud of their community and culture.
9) PHYSICAL INTEGRITY
To maintain and enhance the quality of landscapes, both urban and rural, and avoid the physical and visual degradation of the environment

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Indicators of status and performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cleanliness</td>
<td>Volume of garbage thrown in public areas (garbage count)</td>
</tr>
<tr>
<td>Quality of rural and urban landscapes (impacts of infrastructure development, land use patterns, visual pollution)</td>
<td>Number of new buildings approved, build Extension, % of area built, classified for urban development Number of buildings, commercial signs, infrastructure, that can be seen from viewpoints, along scenic roads Number of new buildings can be seen in historic sites % of area, coastline covered by buildings and infrastructure, number or % of buildings exceeding the height of the vegetation cover % of coastal area eroded % of area with traditional land use (rate of change over time)</td>
</tr>
<tr>
<td>Use intensity of sites, congestion</td>
<td>Number of tourists (annual average, in peak days, periods) Number of congested days Number of tourists per square meter in peak periods</td>
</tr>
</tbody>
</table>

Indicators of management and policy framework
What do we do to improve the situation, what management responses are delivered what policies are implemented to create an enabling environment?

- Number, frequency of garbage collection services
- Number, frequency of clean up programmes
- Existence of a land use or development planning process, including tourism (can be categorized by degree to which it covers tourism, e.g. land use planning that includes zones for tourism development, specific criteria for tourism properties);
- % of area subject to control (density, design, etc).
- % of area designated for tourism purposes, for buildings.
- Existence of land use regulation and licensing processes for new buildings, level of compliance
- % building proposals receiving environmental impact assessment (EIA);
- Existence of congestion management measures

Indicators of perception/satisfaction of tourists and residents
What is the opinion of the tourists about the quality of the destination experience, and what is the opinion of locals about tourism’s impacts?

- % of tourists with the opinion that the destination/site is clean
- % of residents with he opinion that tourism affects the cleanliness of the place
- % of tourists who believe that the natural environment is pristine, or the urban area is well-conserved
- % of tourist with the opinion that the site is crowded
10) BIOLOGICAL DIVERSITY
To support the conservation of natural areas, habitats and wildlife, and minimize damage to them.

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Indicators of status and performance</th>
</tr>
</thead>
</table>
| Impacts of tourist and local use on flora and fauna, species population, habitat | • Number of species (count, sightings) – per key, endemic or unique species, changes in population over time  
• Breeding success rate of key species  
• % of habitat being affected by tourism infrastructure and facility development  
• Number of incidents on inappropriate behaviour of tourists (e.g. causing fire, collecting protected species, geological features, littering), extension of area affected  
• % of area with traditional land use patterns (change over time)  
• Number of incidents on inappropriate practices by locals, % of area affected (e.g. illegal poaching, gathering, burning) |
| Quality of natural landscapes | • Number of buildings, commercial signs, infrastructure that can be seen from viewpoints, along scenic roads  
• Extension, % of area in degraded condition visible from viewpoints, along scenic routes |
| Visitor infrastructure in natural and protected areas | • Length of trails, existence of signage, interpretative materials along the trails  
• % of trails in degraded/eroded conditions  
• Existence of visitor centre, number of tourists using  
• Existence of tourist information on natural features and values in different media (printed, electronic), level of distribution and use |
| Information, interpretation services | • Availability of interpretive programmes, facilities and materials (e.g. guided walks, visitor centres, museums, information in printed and electronic media) number of tourists using them  
• Number of guides per tourists |
| Use intensity of natural areas | • Number of tourists (per year, in peak seasons)  
• Density of tourists in key sites (number per square m2) |

**Indicators of management and policy framework**
What do we do to improve the situation, what management responses are delivered what policies are implemented to create an enabling environment?

- Existence of public use or tourism management in natural and protected areas
- Existence of tourist use zoning
- Revenues generated through tourism (user fees, licences, retail, merchandising, voluntary contributions), % retained for site conservation and maintenance
- Existence of regulation, licensing process for tour operators
- Existence of building regulations and environmental impact assessment procedure for tourism infrastructure development, level of compliance
- Existence of training and business development support programmes for eco and nature-tourism businesses
**Indicators of perception/satisfaction of tourists and residents**

*What is the opinion of the tourists about the quality of the destination experience, and what is the opinion of locals’ about tourism’s impacts?*

- Number of tourists with the opinion that the natural area is pristine and well-preserved
- Tourists satisfaction with the overall nature experience, interpretation and information services (e.g. availability of materials, guides)
- Number of tourists with the opinion that the natural area/site is over-crowded
- Number of locals with the opinion that tourism harms the environment

**11) RESOURCE EFFICIENCY**

*To minimize the use of scarce and non-renewable resources in the development and operation of tourism facilities and services. To promote policies and techniques to facilitate the reduction, re-use and recycling of scarce resources.*

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Indicators of status and performance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Water use and conservation, allocation between different sectors, supply (shortages)</strong></td>
<td>What is the current/baseline situation? How well/bad we are doing now and how do we progress?</td>
</tr>
<tr>
<td>Number of facilities applying water-recycling techniques</td>
<td>Total volume consumed and litres per tourist (change, reduction over time) in tourism facilities</td>
</tr>
<tr>
<td>% of wastewater recycled</td>
<td>% of volume of water used in tourism, compared to other sectors, or by local population</td>
</tr>
<tr>
<td>Total use as % of installed capacity</td>
<td>Water price per litre or cubic meter</td>
</tr>
<tr>
<td>Number of shortage incidents per year</td>
<td>Number of facilities applying water-recycling techniques</td>
</tr>
<tr>
<td>% of tourism establishments with water treated to international potable standards</td>
<td>% of local population with access to potable water</td>
</tr>
<tr>
<td>Frequency of water-borne diseases</td>
<td>% of energy consumption from renewable resources (at destinations, establishments)</td>
</tr>
<tr>
<td><strong>Drinking water quality</strong></td>
<td>Per capita consumption of energy from all sources (overall, and by tourist sector – per person day)</td>
</tr>
<tr>
<td><strong>Energy use and saving, renewable sources</strong></td>
<td>% of energy consumption from renewable resources (at destinations, establishments)</td>
</tr>
<tr>
<td><strong>Land use (land as scarce resource)</strong></td>
<td>% of land subject to land use regulation</td>
</tr>
<tr>
<td></td>
<td>% of are designated for tourism development</td>
</tr>
</tbody>
</table>

**Indicators of management and policy framework**

*What do we do to improve the situation, what management responses are delivered what policies are implemented to create an enabling environment?*

- Number of hotels and establishment with environmental management systems, having a designated environmental manager
- % of establishments applying water-saving policies, techniques, devices
- Percentage of businesses participating in energy conservation programs, or applying energy saving policy and techniques
- Number, % of hotels and establishments having an environmental certification
- Existence of incentives, training and support programmes for the application of environmental management techniques
- Existence of land use regulation and licensing processes for new buildings, level of compliance
12) ENVIRONMENTAL PURITY
To minimize the pollution of air, water and land and the generation of waste by tourism enterprises and visitors.

<table>
<thead>
<tr>
<th>Sustainability issues</th>
<th>Indicators of status and performance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>What is the current/baseline situation? How well/bad we are doing now and how do we progress?</td>
</tr>
<tr>
<td>Solid waste</td>
<td>• Waste volume produced by the destination (tonnes, by month, by tourism)</td>
</tr>
<tr>
<td></td>
<td>• Volume, % of waste recycled (specified by different types)</td>
</tr>
<tr>
<td></td>
<td>• Quantity of waste strewn in public areas (garbage counts)</td>
</tr>
<tr>
<td>Sewage</td>
<td>• Percentage of sewage from the destination/site receiving treatment (also break out sewage from tourism sector if possible)</td>
</tr>
<tr>
<td></td>
<td>• % of treated sewage recycled (e.g. for irrigation).</td>
</tr>
<tr>
<td></td>
<td>• Number of reported pollution or contamination events per annum (by month) in watercourses receiving effluents</td>
</tr>
<tr>
<td>Bathing water quality (fresh water recreation areas, seawater, beaches)</td>
<td>• Level of contamination of bathing water (e.g. faecal coliforms, campylobacter, heavy metals);</td>
</tr>
<tr>
<td></td>
<td>• # days beach/shore closed due to contamination events;</td>
</tr>
<tr>
<td></td>
<td>• Turbidity of water (simple tests);</td>
</tr>
<tr>
<td></td>
<td>• Alternative proxy indicators where laboratory testing - frequency of algae blooms;</td>
</tr>
<tr>
<td></td>
<td>- counts of dead fish or birds on shore;</td>
</tr>
<tr>
<td></td>
<td>- frequency counts of indicator species which are particularly (sponges, corals, sea-urchin).</td>
</tr>
<tr>
<td>Air (quality)</td>
<td>• Number of days exceeding standards.</td>
</tr>
<tr>
<td></td>
<td>• Incidence of respiratory problems (local and tourist);</td>
</tr>
<tr>
<td></td>
<td>• Number of health problems reported by tourists and residents.</td>
</tr>
<tr>
<td></td>
<td>• Number of warnings regarding the air pollution of the destination in major publications and guidebooks</td>
</tr>
<tr>
<td>Noise</td>
<td>• Noise levels at site in decibels (also can be reported by time of day).</td>
</tr>
<tr>
<td>Environmental friendly transport</td>
<td>• Existence, frequency of public transport and environmental friendly transport alternatives in order to reduce emissions (air quality) and noise</td>
</tr>
<tr>
<td></td>
<td>• %, number of tourists using public or alternative transport</td>
</tr>
</tbody>
</table>

**Indicators of management and policy framework**
*What do we do to improve the situation, what management responses are delivered what policies are implemented to create an enabling environment?*
- Waste collection capacity (n. of bins, trucks, frequency of collection, staff, etc.)
- Existence of recycling facility
- Number/% of hotels applying selective waste collection
- Percentage of tourism establishments (or accommodation) on (suitable)
- systems treatment systems
• Existence of noise regulations, level of compliance
• Existence of traffic regulation

**Indicators of perception/satisfaction of tourists and residents**
What is the opinion of the tourists about the quality of the destination experience, and what is the opinion of locals’ about tourism’s impacts?

• Tourist perception on the quality of bathing water
• Perception of air quality by tourists
• Number of complaints received on noise
• % of tourists with the opinion that noise affected their vacation
Model Exit Questionnaire to evaluate the satisfaction of tourists

The questions suggested in the sample below are based on a model questionnaire undertaken in several destinations in a number of countries and are designed to quantify and clarify the components of visitor satisfaction. Additional questions can be added, including probes to clarify the reasons why specific responses were received.

Analysis of responses according to motivation for the visit, origin, region, and demographic characteristics can assist in understanding what the indicator (or specific sub-indicator) really means. The overall list could become a long list of questions which would be too much to administer to exiting tourists (in the few minutes available in a departure lounge, ferry line-up, customs post or hotel lobby). It may be useful to begin with a shorter list of questions of greatest importance.

Some of the questions may be amenable to asking only to a smaller set of tourists so that no one departing tourist is overwhelmed with the list. A pilot test of the questions will provide insight into the best way to administer the questions.

Exit Questionnaire

Why did you visit [this destination]? ________________________________________________________________

Is this your first visit? Yes No
If yes, when were you last here? ____________________________

While [here] did you: Visit a beach Yes No
Visit the mountains Yes No
Walk on natural trails Yes No

Which was your primary reason for the visit? (ring answer) (Note: include the key destination activities or attractions)

Attend a conference Yes No
Visit relatives Yes No
Visit cultural sites Yes No
Take a cruise Yes No
Conduct business Yes No
Attend a cultural performance Yes No
Participate in (See note 1) etc. Yes No

Which parts of (the destination) did you visit (where there are different sites)?

Site A) ___ Town
Site B) ___ The Hills
Site C) ___ The heritage site, etc.

Where did you spend most of your time? (ring one answer)

(Possible follow-up question for where precisely the respondent stayed__________________________ - a specific resort, hotel, or community)
Please respond to the following questions with the appropriate answer:

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Disagree</td>
<td>Disagree</td>
<td>Neutral</td>
<td>Agree</td>
<td>Strongly Agree</td>
</tr>
</tbody>
</table>

**Note:** The following questions are samples – choose those appropriate or modify as needed for the destination. The questions can refer generally to the following main aspects of tourist’s satisfaction: access, tourist information, quality of services, safety and security, variety of experiences/sites/activities, attitude of relation with locals, destination environment (cleanliness, noise, built and natural environment, etc.), overall satisfaction, intent to repeat visit or advise destination to friends, etc.

Circle best answer

I enjoyed my experience in “destination”

The state of roads and signage made travel easy

I found the “destination” to be clean

“Destination” provided a good variety of experiences

The towns and villages were crowded

I had a good experience involving the local culture

Cultural sites were well maintained

Cultural sites were accessible

The beaches were clean

Good souvenirs and crafts were available

I had good opportunities to enjoy local cuisine

The quality of food was good

The quality of accommodation was good

The level of service provided was high

Service staff were competent and helpful

I was bothered by the messy appearance of built areas

I was bothered by noise

I was bothered by garbage in public areas

The state of the natural environment was good

“Destination” has an interesting and varied landscape

It was easy to get to “destination” for my visit

I felt safe and secure during my visit

I feel I received good value for money

I would recommend “destination” to my friends

I would visit “destination” again
Note: possible follow up: * probe if get strong response – ask where or what caused this opinion?,

# identify reason for negative

Note that the same question can also be phrased in the negative (I feel I did not get good value for money. In practice, Both seem to obtain similar responses but the phrasing should be kept constant over time for valid comparisons.

Would you be interested in visiting the “destination” outside the summer (or other peak) season? What places/sites in the destination would you likely visit and what activities would you prefer to do during the winter (or other off-season period)?

_____________________________________________________________________

Were there any activities which you expected to find in “destination” which were missing?

_____________________________________________________________________

How long would you spend next time in “destination”?

_____________________________________________________________________

What could be done to improve your vacation next time in “destination”?

_____________________________________________________________________

Would you mind providing us with a few details on yourself?

Nationality____________
Age: (See note 2) _______________
Length of stay_____________
Number in party_______________________
Home city or region_________________

Thank you for your valuable comments

Use of Follow-up probes:
An alternative probe which has proven useful is the following set of questions:

If you return, what would you do again?

What would you not do?

What would you change?

(These questions help to do a SWOT, and have been used in some other destinations.)

Note 1: For some of the questions, smaller samples will yield useable results, as long as the data are to be used for simple time-series comparisons and not for any more sophisticated analyses in for example, contingency tables differentiated by nationality, age or region visited. For questions which may address something done by only a few tourists (e.g., bicycling, diving, cultural events, caving) a sequence of questions can serve. The first question may ask whether a tourist participated in any of these activities. The second may be asked only of those who did these activities.)

Note 2: It may be useful to collect some information about the respondent to permit a more nuanced analysis of the data: do this at the end of any questionnaire. It is usually effective to allow respondents to decline to give personal responses, but in most
circumstances, if asked late in the survey process, respondents will agree to some personal information – particularly if assured that responses will be confidential. Suggested data could include: age, gender, permanent residence, occupation, place of residence in the destination. Take care with any questions about age, income, ethnicity, religion or social class as these may be considered offensive and may even be illegal to ask in some jurisdictions.

Model Questionnaire to evaluate satisfaction of host community members

The model local or resident questionnaire is designed to provide information on the attitudes and concerns of the community with respect to the key issues from their perspective. The sample questionnaire which follows is designed to, as objectively as possible, obtain information from the community. The questions are generally structured as statements with which the respondent can agree or disagree. A five point scale is used, from strongly disagree, to disagree, neutral, agree to strongly agree. This approach is consistent with recommended practice for questionnaires of this type (some prefer a seven point scale), and allows respondents to indicate a neutral stance. Several model questions are provided addressing many of the issues found to be key in past studies and applications. Destinations may have their own specific issues (e.g. tourists taking the shellfish, tourists disturbing traditional ceremonies, or noise caused by tourism activities, etc.) which are sufficiently important to warrant their own question. The questions normally refer to perceived benefits received from tourism (individual or community benefits, economic or social benefits, conservation of traditions, etc.), changes in socio-economic conditions (e.g. prices, access to resources, traditional values), changes in environmental conditions (improvement or degradation), interaction with tourists, etc.

Users are advised to follow the same format for such questions. (e.g., “Tourist harvesting activity is harming the local harvest of shellfish” – to which they are asked if they agree or disagree and to what extent). Changes over time in the responses (e.g., last year 40% agreed, and 10% strongly agreed. This year over 50% agreed, and over 25% strongly agreed.) can be important signals at the community level.

One consideration in administering community questionnaires is length and appropriateness. Those using this form of questionnaire are urged to do so with the full knowledge and support of local representatives and community leaders wherever possible, and encouraged to test any new questions before using them – both for clarity, and suitability/sensitivity to the local culture.

This is a model of a local questionnaire which could be periodically administered to a sample of local residents – either widely or in specific destinations.
Please indicate your opinion on each of the following questions.

<table>
<thead>
<tr>
<th>Question</th>
<th>1 Strongly Disagree</th>
<th>2 Disagree</th>
<th>3 Neutral</th>
<th>4 Agree</th>
<th>5 Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>A) Tourism is good for my community</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B) I personally benefit from the tourism industry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C) Tourism in my community/region has the following effects: (bulleted below):</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• creates jobs for local residents</td>
<td></td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>• employs local youth</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• raises prices for goods</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• helps the community obtain services</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• causes rise in crime rates</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• harms moral standards</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• disrupts local activities</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• harms the environment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• stops locals from beach (or park, trail or similar) access</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>• helps stimulate local culture and crafts</td>
<td></td>
<td></td>
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<tr>
<td>• uses natural resources needed by local residents (e.g., fish, game, water etc)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• The community has control over tourism</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• The money spent by tourists remains in my community</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Local residents have easy access to the areas which tourists use</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Etc:</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

Overall, what is your opinion of the tourism in your community?
Very Unsatisfactory------Poor----------Satisfactory -----------Good----------Excellent
1         2   3     4           5

Would you want more or less tourism in the future in your community or region?
Much Less---------------Less-------------Same----------------More-------------Much More
1         2            3   4           5

What is your main concern regarding tourism in your community?
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________

What could be done to improve tourism in your community?
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
Comments:

_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________

Note 1: Where specific issues or concerns are known, a question in the above formats could be added. The question can respond to the issues raised in the community or identified through participatory processes. Such issues can be very specific to a destination or even a particular site (too much noise at the waterslide, loss of access to the beach, lack of control of trespassing by hunters etc). Care needs to be taken to not add too many questions – as excessively long questionnaires may be seen as a burden and can reduce response rates.

Note 2: It may be useful to collect some information about the respondent – do this at the end. Suggested data could include: gender, length of time resident in community, occupation, place of residence in the destination. Take care with any questions about age, income, ethnicity, religion or social class as these are often considered offensive and may even be illegal to ask in some jurisdictions.
ANNEX D: SUSTAINABLE TOURISM INDICATOR SETS

UNWTO Baseline Indicators
From: Guidebook on Indicators of Sustainable Development for Tourism Destinations, UNWTO (2004)

Local satisfaction with tourism
• Local satisfaction level with tourism (Questionnaire)

Effects of tourism on communities
• Ratio of tourists to locals (average and peak period/days)
• % who believes that tourism has helped bring new services or infrastructure. (questionnaire-based)
• Number and capacity of social services available to the community (% which are attributable to tourism)

Sustaining tourist satisfaction
• Level of satisfaction by visitors (questionnaire-based)
• Perception of value for money (questionnaire-based)
• Percentage of return visitors

Tourism seasonality
• Tourist arrivals by month or quarter (distribution throughout the year)
• Occupancy rates for licensed (official) accommodation by month (peak periods relative to low season) and % of all occupancy in peak quarter or month
• % of business establishments open all year
• Number and % of tourist industry jobs which are permanent or full-year (compared to temporary jobs)

Economic benefits of tourism
• Number of local people (and ratio of men to women) employed in tourism (also ratio of tourism employment to total employment)
• Revenues generated by tourism as % of total revenues generated in the community

Energy management
• Per capita consumption of energy from all sources (overall, and by tourist sector – per person day)
• Percentage of businesses participating in energy conservation programs, or applying energy saving policy and techniques
• % of energy consumption from renewable resources (at destinations, establishments)

Water availability and conservation
• Water use: (total volume consumed and litres per tourist per day)
• Water saving (% reduced, recaptured or recycled)

Drinking water quality
• Percentage of tourism establishments with water treated to international potable standards
• Frequency of water-borne diseases: number/percentage of visitors reporting water-borne illnesses during their stay

**Sewage treatment**
• Percentage of sewage from site receiving treatment (to primary, secondary, (wastewater management) tertiary levels)
• Percentage of tourism establishments (or accommodation) on treatment system(s)

**Solid waste management (garbage)**
• Waste volume produced by the destination (tonnes) (by month)
• Volume of waste recycled (m³) / Total volume of waste (m³) (specify by different types)
• Quantity of waste strewn in public areas (garbage counts)

**Development control**
• Existence of a land use or development planning process, including tourism
• % of area subject to control (density, design, etc.)

**Controlling use intensity**
• Total number of tourist arrivals (mean, monthly, peak periods)
• Number of tourists per square metre of the site (e.g., at beaches, attractions), per square kilometre of the destination - mean number/peak period average.

<table>
<thead>
<tr>
<th>No.</th>
<th>Core</th>
<th>Indicator</th>
<th>Purpose – what the indicator shows</th>
<th>Collected by</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yes</td>
<td>Total visitor arrivals or bednights per month</td>
<td>Tourism volume and seasonality</td>
<td>Records from accommodation establishments</td>
</tr>
<tr>
<td>2</td>
<td>Yes</td>
<td>Total day visitor estimate per annum or per month</td>
<td>Tourism volume and seasonality</td>
<td>Counts and visitor survey at arrival points/ key sites</td>
</tr>
<tr>
<td>3</td>
<td>Yes</td>
<td>Number of bedspaces (by accommodation type)</td>
<td>Tourism capacity and basis for calculating volume.</td>
<td>Existing records or regular audit</td>
</tr>
<tr>
<td>4</td>
<td>Yes</td>
<td>Annual average % bedspace and bedroom occupancy of accommodation</td>
<td>Enterprise performance, and basis for calculating volume.</td>
<td>Business records or survey</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>% of enterprises reporting growth in business over previous year</td>
<td>Relatively robust measure of growth and competitiveness</td>
<td>Business survey</td>
</tr>
<tr>
<td>6</td>
<td>Yes</td>
<td>Average spending per head</td>
<td>Economic return from tourism</td>
<td>Visitor survey</td>
</tr>
<tr>
<td>7</td>
<td></td>
<td>Local spending (or GDP) generated by tourism</td>
<td>Tourism value and contribution to local economy</td>
<td>Visitor survey showing spend plus business survey on occupancy (or local TSA process)</td>
</tr>
<tr>
<td>8</td>
<td>Yes</td>
<td>% of bedspaces available all year</td>
<td>Seasonality</td>
<td>Existing records, regular audit or business survey</td>
</tr>
<tr>
<td>9</td>
<td>Yes</td>
<td>Ratio of average occupancy (or total)</td>
<td>Seasonality</td>
<td>Business records or survey</td>
</tr>
<tr>
<td>No.</td>
<td>Core</td>
<td>Indicator</td>
<td>Purpose – what the indicator shows</td>
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<td>---------------------------------------------------</td>
</tr>
<tr>
<td>10</td>
<td>Yes</td>
<td>Number of beds per 1000 local population</td>
<td>Potential imbalance and pressure on community and resources</td>
<td>From indicator 3 and population records</td>
</tr>
<tr>
<td>11</td>
<td>Yes</td>
<td>Ratio of number of tourists to local population</td>
<td>Potential imbalance and pressure on community and resources</td>
<td>From indicators 1 and 2 and population records</td>
</tr>
<tr>
<td>12</td>
<td>Yes</td>
<td>Average length of stay</td>
<td>Value to the community as against impact of transport</td>
<td>Visitor and business surveys</td>
</tr>
<tr>
<td>13</td>
<td></td>
<td>% tourism enterprises accessible by public transport</td>
<td>Potential to accommodate non-car access and need for improvement</td>
<td>Facility audit and business survey</td>
</tr>
<tr>
<td>14</td>
<td>Yes</td>
<td>% of visitors arriving by means other than car or plane</td>
<td>Trend in transport modal change – effect on carbon emissions</td>
<td>Visitor survey</td>
</tr>
<tr>
<td>15</td>
<td></td>
<td>% visitor use of public transport when in the destination</td>
<td>Trend in transport modal change – effect on carbon emissions</td>
<td>Visitor survey</td>
</tr>
<tr>
<td>16</td>
<td></td>
<td>Total employment in sector as percent of total employment</td>
<td>Relative importance of tourism jobs and balance in the economy</td>
<td>Industry sector records/codes</td>
</tr>
<tr>
<td>17</td>
<td>Yes</td>
<td>% of tourism jobs that are seasonal only</td>
<td>Job quality and seasonality</td>
<td>Business survey</td>
</tr>
<tr>
<td>18</td>
<td>Yes</td>
<td>Average hourly earnings in tourism as ratio of all industry hourly earnings</td>
<td>Job quality</td>
<td>Business survey and comparative sector figures</td>
</tr>
<tr>
<td>19</td>
<td></td>
<td>% employees with vocational qualifications in tourism</td>
<td>Job quality and career conditions.</td>
<td>Business survey</td>
</tr>
<tr>
<td>20</td>
<td>Yes</td>
<td>% residents indicating that they are satisfied with local impact of tourism</td>
<td>Community acceptance and benefit from tourism</td>
<td>Residents survey</td>
</tr>
<tr>
<td>21</td>
<td></td>
<td>% residents identifying that they are directly benefiting from local tourism and % believing that it adds to overall quality of life</td>
<td>Community benefit from tourism</td>
<td>Residents survey</td>
</tr>
<tr>
<td>22</td>
<td>Yes</td>
<td>% of enterprises with recognised environmental certification</td>
<td>A robust indication that action is actually being taken</td>
<td>Records from certification schemes and/or business survey</td>
</tr>
<tr>
<td>23</td>
<td></td>
<td>% of enterprises reporting that they are taking environmental management measures</td>
<td>Wider (but less robust) indication of environmental management irrespective of reaction to certification</td>
<td>Business survey</td>
</tr>
<tr>
<td>24</td>
<td></td>
<td>Amount and proportion of waste sent to landfill (Total or sum from tourism)</td>
<td>Resource efficiency and land pollution</td>
<td>Municipal measurement or sum of data submitted by tourism enterprises</td>
</tr>
<tr>
<td>25</td>
<td></td>
<td>% of waste recycled by tourism enterprises</td>
<td>Commitment to resource efficiency</td>
<td>Business survey</td>
</tr>
<tr>
<td>26</td>
<td></td>
<td>Sewerage discharge (Total or sum from tourism)</td>
<td>Pollution potential</td>
<td>Municipal measurement or sum of data submitted by tourism enterprises</td>
</tr>
<tr>
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<td>Core</td>
<td>Indicator</td>
<td>Purpose – what the indicator shows</td>
<td>Collected by</td>
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</tr>
<tr>
<td>27</td>
<td></td>
<td>% tourism enterprises not connected to efficient sewerage treatment</td>
<td>Pollution potential</td>
<td>Municipal records and business survey</td>
</tr>
<tr>
<td>28</td>
<td>Yes</td>
<td>Water consumption (Total or sum from tourism) – total and at busiest period</td>
<td>Resource efficiency and community impact</td>
<td>Municipal measurement or sum of data submitted by tourism enterprises</td>
</tr>
<tr>
<td>29</td>
<td></td>
<td>% water recycled by tourism enterprises</td>
<td>Commitment to resource efficiency</td>
<td>Business survey</td>
</tr>
<tr>
<td>30</td>
<td>Yes</td>
<td>Water quality (sea and freshwater areas)</td>
<td>Nature conservation and attractiveness of environment for local people and tourists</td>
<td>Regular water sampling</td>
</tr>
<tr>
<td>31</td>
<td></td>
<td>Total energy consumption (or CO₂ emissions) from tourist facilities</td>
<td>Resource efficiency and pollution</td>
<td>Sum of data submitted by tourism enterprises</td>
</tr>
<tr>
<td>32</td>
<td></td>
<td>Air quality</td>
<td>Attractiveness of environment for local people and tourists</td>
<td>Regular air purity sampling</td>
</tr>
<tr>
<td>33</td>
<td>Yes</td>
<td>Quantity of strewn litter at selected sites</td>
<td>Attractiveness of environment for local people and tourists</td>
<td>Observation. Visitor and residents surveys</td>
</tr>
<tr>
<td>34</td>
<td></td>
<td>Number of people at selected sites on busiest days</td>
<td>Pressure on community and environment</td>
<td>Visitor counts and survey</td>
</tr>
<tr>
<td>35</td>
<td>Yes</td>
<td>Environmental state of selected sites</td>
<td>Damage to landscape and biodiversity</td>
<td>Observation, Visitor and residents survey</td>
</tr>
<tr>
<td>36</td>
<td></td>
<td>Number and size of protected sites and land area</td>
<td>Natural and cultural heritage quality and ability to withstand pressure</td>
<td>Recorded designations</td>
</tr>
<tr>
<td>37</td>
<td>Yes</td>
<td>Percentage of selected types of precious landscape area (e.g. length of coastline) that is built upon</td>
<td>Reduction in attractiveness</td>
<td>Land use records and observation</td>
</tr>
<tr>
<td>38</td>
<td></td>
<td>Percentage of area subject to land use planning and development control</td>
<td>Ability to withstand pressure</td>
<td>Land use plans</td>
</tr>
<tr>
<td>39</td>
<td></td>
<td>Contribution of tourism enterprises and visitors to conservation</td>
<td>Support from tourism for conservation</td>
<td>Visitor survey, business survey. Monitoring of specific schemes</td>
</tr>
<tr>
<td>40</td>
<td>Yes</td>
<td>% tourism enterprises participating in quality certification scheme</td>
<td>Business engagement, quality and competitiveness</td>
<td>Records from schemes. Business survey</td>
</tr>
<tr>
<td>41</td>
<td>Yes</td>
<td>% visitors indicating that they are satisfied with overall experience</td>
<td>Destination quality and visitor satisfaction</td>
<td>Visitor survey</td>
</tr>
<tr>
<td>42</td>
<td></td>
<td>% visitors who are on a repeat visit and % who say they will return</td>
<td>Destination quality and visitor satisfaction</td>
<td>Visitor survey</td>
</tr>
<tr>
<td>43</td>
<td>Yes</td>
<td>% tourism enterprises meeting specified accessibility standards</td>
<td>Ability to provide a visitor experience without discrimination</td>
<td>Inspection scheme records. Business survey</td>
</tr>
<tr>
<td>44</td>
<td></td>
<td>% of visitors with a physical or sensory disability</td>
<td>Relative social inclusion of the destination</td>
<td>Visitor survey</td>
</tr>
<tr>
<td>45</td>
<td></td>
<td>% of visitors from lower socio-economic groups</td>
<td>Relative social inclusion of the destination</td>
<td>Visitor survey</td>
</tr>
<tr>
<td>No.</td>
<td>Core</td>
<td>Indicator</td>
<td>Purpose – what the indicator shows</td>
<td>Collected by</td>
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</tr>
<tr>
<td>46</td>
<td></td>
<td>% of visitors who are benefit from a supported holiday scheme</td>
<td>Importance of social tourism to the destination</td>
<td>Visitor or business survey</td>
</tr>
<tr>
<td>47</td>
<td></td>
<td>Level of satisfaction of visitors with a physical or sensory disability</td>
<td>Relative social inclusion of the destination</td>
<td>Visitor survey</td>
</tr>
<tr>
<td>48</td>
<td>Yes</td>
<td>Presence of a destination management organisation that involves different stakeholders</td>
<td>Inclusive approach to destination management</td>
<td>Presence/absence against definition</td>
</tr>
<tr>
<td>49</td>
<td>Yes</td>
<td>% of businesses that belong to local tourism association</td>
<td>Degree of engagement by the private sector in destination management</td>
<td>Membership records</td>
</tr>
<tr>
<td>50</td>
<td>Yes</td>
<td>Existence of an agreed and monitored sustainable tourism strategy and action plan</td>
<td>Commitment to sustainable destination management</td>
<td>Presence/absence against definition</td>
</tr>
</tbody>
</table>

Notes to the table:

Indicator 4  
This should include capacity even when closed in calculating the % occupancy.

Indicator 7  
Tourism spending is likely to be a crude calculation only. Some destinations may be engaged in more sophisticated Tourism Satellite Accounting processes.

Indicators 24, 26, 28  
Ideally, tourism enterprises should measure their resource use and waste output and make this available so that a net figure for the destination can be calculated. However, in the absence of direct measurement, some studies of indicators have suggested giving a proxy estimate of impact or use from tourism by multiplying the total amount of resource use and waste in the destination by the ratio of tourist nights to all nights (tourists plus residents). We suggest that it is misleading to suggest that this is a true measure of tourism impact and it would be more transparent simply to give total volumes of resource use and waste for the area, together with population size and estimated tourist nights. The total figures (e.g. amount of waste to landfill, total water use etc.) do anyway provide an indication of the state of environmental management and would enable a worsening or improving situation to be detected. Seasonal variation in these total figures set against tourist flow patterns may provide some estimate of the impact due to tourism.

Indicator 37  
The choice of ‘precious landscape’ may vary between destinations. For coastal destinations, this should include ‘length of coastline’.
ANNEX E: GUEST SURVEYS & VISITOR CENSUS IN THE BJELASICA-KOMOVI REGION

Background: In order to support tourism development with market information, the Austrian – Montenegrin Co-operation Project (AMCP), started a survey to evaluate tourists’ motivation to visit the northern region of Montenegro, tourists’ perception of the existing offer, as well as expectations for future visits.

The survey began during the winter season 2004/2005, then continued with new data collection in the summer season 2005, last it was conducted during the summer season of 2006. During winter season 2005/2006 simple survey in the hotels and restaurant has been conducted. Guest survey on summer 2006 was realized for all 13 municipalities in North of Montenegro, in cooperation with AMPC, FORS Montenegro and UNDP.

Along with this survey, guest census has been also conducted. During the summer season 2005 and 2006, a guest census has been undertaken at the tourist “hot spots” in the Bjelasica & Komovi region. The information about the number and profile of guests, as well as the seasonality of visits provides the basis for a better focused product development and tourism marketing of the region, especially in the National Park Biogradska Gora.

Mountain hiking is an important activity of tourists in the B&K region in summer. In order to get data about these guests the available books from four peaks in the Bjelasica and Komovi mountains (Bjelasica: Crna glava and Smajevac – Kljuc; Komovi: Vasojevicki Kom and Kucku Kom) have been analysed.

For summer tourism few “hot spots” can be distinguished in the B&K region: NP Biogradska Gora, peaks on mountains Bjelasica and Komovi and tour operators for rafting are such. During winter season guest has been counted at the entrance of the Ski center in Bjelasica.

Metodology: Work on the survey about satisfaction of tourists with the offer in the Bjelasica and Komovi Region started with preparation of the questionnaire. The questionnaire was defined to provide information on the following aspects: profile of tourists that spend the summer holiday in the Bjelasica and Komovi Region, their habits while on vacation, their evaluation of the accommodation and food quality offered in this region, as well as. The survey also had the task of presenting the tourists’ satisfaction level on offer here. Additionally, the survey was designed to identify the tourists’ demand for summer/winter vacationing in this area.

The final version of the questionnaire had 34 questions (including demographic questions). An example of the questionnaire with basic frequencies is provided in the Appendix. SPSS software was used for data entry and data processing.

The sampling frame and the applied methodology resulted in findings that are considered to be a valid representation of the tourists visiting these areas.

Based on data provided by the Montenegrin National Tourist Organization regarding tourists in this area, and corroborated by the AMPC, the survey was completed for the entire zone.
During the winter season 2006 from January 1st to April 1st a guest survey has been conducted in hotels and restaurants in the Bjelasica and Komovi region. Two simple questionnaires were on display in hotel rooms and on tables in restaurants during this period. Guests were asked and motivated by the employees in these facilities to fill in the questionnaires. The questionnaire consisted of six questions (including demographic data). In total answers from 346 completed questionnaires were analyzed.

During the summer season 2005 and 2006, a guest census has been undertaken at the entrance of NP Biogradska Gora.

From June 1st to September 15th almost 100% of the visitors in the NP Biogradska Gora have been surveyed.

Very simple questionnaire with questions about category of tourists and their origin was used.

**Basic characteristics of the sample:** The research included 304-310 respondents, selected according to previously defined quotas regarding gender, age and place of origin. Potential respondents had to be older than 15 and younger than 64 years. This survey did not include the local population.
Training of the pollsters: To ensure valid survey results, all pollsters attended a one-day training session. Special attention was paid to administer open-ended questions and questions that had the possibility of multiple answers. A pre-condition for the pollsters was to be fluent in English given the fact that the survey was to be conducted among domestic and foreign guests as well.

Presentation of results of surveys: Information about surveys results were presented at regional conferences and sent to all relevant institutions. A summary of the surveys was sent to relevant Ministries, municipalities, hotels, restaurants, tourism agencies and all relevant stakeholders in the region. All of them were invited to contact the project office if they were interested to receive the complete results of surveys and to send their feedbacks with comments, suggestions, recommendation for next surveys. The Ministry of Tourism and other international organizations which realized projects in the North of Montenegro emphasized the importance of the gained results. Unfortunately just limited feedback was received local level organizations on the surveys, and there is more work needs to be done to raise awareness on the usefulness of these surveys and build capacity to utilize more effectively this information for tourism planning and management.
1. **Where do you have your permanent residence?**
   1. Montenegro, write out town/city ________________
   2. Serbia, write out town/city ________________
   3. Others write out state and town/city ________________

2. **What is the reason for coming here?** (NO MORE THAN THREE ANSWERS, RANK PLEASE)
   1. Transit
   2. Business
   3. Leisure, vacation, recreation, health
   4. I/my family have holiday house here
   5. Visiting relatives/friends
   6. Visiting the NP Biogradska Gora/Durmitor
   7. Active sports (mountain hiking, rafting, fishing)
   8. Visiting of cultural sights museums, exhibitions
   9. Experience something new
   10. Other reasons for coming here ________________

3. **What sources did you use to get information and to prepare your current vacations?** (NO MORE THAN THREE ANSWERS, RANK PLEASE)
   1. I already knew
   2. Information and recommendation from relatives/friends
   3. Magazines/brochures of regions
   4. Advise/Catalogue of travel agencies
   5. Information at the tourism office at home
   6. Reports/advertising in media
   7. Travel literature/travel guide
   8. Visit of a trade show/tourism fair
   9. Internet, what web page__________________
   10. Others ______________________________

4. **What has been the most important factor that you chose this destination and did not travel to another one?** (no reading- just tick the appropriate, more answers possible. RANK PLEASE)
   1. National Park
   2. Clean air and nature
   3. Experience something new
   4. It is quite near to my home
   5. It is close to the transit route
   6. It is quite cheap
   7. Relatives/friends are living here
   8. Other ________________________________

5. **What mean of transportation did you use to travel here from home?**
   1. Train
   2. Car
   3. Bus
   4. Airplane
   5. Other, or combination of mentioned above, what combination:__________________________

6. **Where you satisfied with the journey/with this mean of transportation?**
   1. Yes
   2. No, because:

7. **Do you travel alone or in companionship?**
   1. Alone (skip to question 10)
   2. Companionship

8. **How many persons are in your travel group (incl. kids)?**
   ____________________________ Number of persons

9. **Who is traveling with you?** (Read out possible choices, more answers possible)
   1. Partner
   2. Kids to age 14
   3. Other family members (parents, kids older than 14, grandmother, grandfather,..)
   4. With friends
   5. With organized travel group

10. **Are you a one day visitor in the North of Montenegro?**
    1. Yes (skip to question 16a)
    2. No

**FOR OVERNIGHT VISITORS:**

11. **In which municipality do you stay overnight?**
    Write out name of municipality: ______________________

12. **How many nights do you stay?**
    Write out the number: ____________

13. **What kind of accommodation did you choose for your current vacations?**
    1. Hotel:
       i. Name of hotel ________________________
       ii. How many stars hotel have? ____________
       iii. Which type of services hotel did you choose?
            1. Full board
            2. Half board
            3. Bed and breakfast
            4. Something else ________________________
    2. Private guest room
       i. Name ________________________
ii. Are you paying tax? 1. Yes  2. No
3. Rented apartment  4. My own house (skip to question 16a)  5. House of relatives/friends (skip to question 16a)

6. Camping  7. Other (mountain hut, ...)

14. How is the quality of accommodation? Possible answers: 1-bad, 2-rather bad, 3- medium, 4- good, 5-very good, 6- no answer. ASK FOR ADDITIONALLY COMMENT WHY SOMETHING IS GOOD OR BAD?

<table>
<thead>
<tr>
<th>Write out 1-6</th>
<th>Additionally comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Quality of room</td>
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<tr>
<td>1. Quality of Furniture, equipment</td>
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<tr>
<td>2. Size of room</td>
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<td>3. Bathroom</td>
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<td>4. Cleanliness</td>
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<tr>
<td>2. Service quality (Friendliness of staff)</td>
<td></td>
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<tr>
<td>3. Quality of breakfast</td>
<td></td>
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<tr>
<td>4. Price / Value for money</td>
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<tr>
<td>5. Leisure facilities / entertainment</td>
<td></td>
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<tr>
<td>6. Other comment</td>
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</tbody>
</table>

15. What would you suggest to improve in accommodation?

16a. Have you been eating out in the region?
1. Yes
2. No (skip to question 18)

16b. How is the quality of gastronomy? Possible answers: 1-bad, 2-rather bad, 3- medium, 4- good, 5-very good, 6- no answer. ASK FOR ADDITIONALLY COMMENT WHY SOMETHING IS GOOD OR BAD?

<table>
<thead>
<tr>
<th>Write out 1-6</th>
<th>Additionally comments</th>
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</thead>
<tbody>
<tr>
<td>1. Atmosphere of restaurants</td>
<td></td>
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<tr>
<td>2. Quality of equipment and furniture</td>
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<tr>
<td>3. Service quality (Friendliness of staff), foreign languages (of menu card/staff)</td>
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<td>4. Variety of food offered</td>
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<td>5. Quality of food</td>
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<td>6. Price/Value for money</td>
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<tr>
<td>7. Regional products offered</td>
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</table>

17. What would you suggest to improve in gastronomy?

18. How is the importance and quality of the tourist offers? (Ask for every item below)

<table>
<thead>
<tr>
<th>Importance (1 very low – 5 very high)</th>
<th>Actual quality (1 very low – 5 very high, 0 = do not know / no experience)</th>
<th>Additionally comments</th>
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</thead>
<tbody>
<tr>
<td>1. Go walking within the vicinity of the villages</td>
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<tr>
<td>2. Hiking, mountain climbing</td>
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<tr>
<td>3. Shopping (also things of daily use)</td>
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</tr>
</tbody>
</table>
4. Jogging, running
5. Cycling
6. Mountain Biking
7. Rafting
8. Canoeing
9. Fishing
10. Hunting
11. Horse riding
12. Other sport activities: (paragliding, …)
13. Wellness/ Beauty/Health
14 Visiting of cultural sights, museums, exhibition
15. Cultural events, theatre, festivals, music
16. Disco, bar
17. Typical local restaurants
18. Events in the evening
19. Program for children
20. Program for bad weather
21. Cultural sights (namely……..)
22. Sign-boarding to sights and gastronomy, hotels,
23. Standard of roads
24. Visitor information

19. **What would you suggest to improve the importance and quality of the tourist offers?**

______________________________________________________________________________________________

20a. **What destination in Montenegro would you recommend for visiting to your friends?**

______________________________________________________________________________________________

20b. **Where did you spend holidays in 2005, and what was your motivation to visit that place?**

______________________________________________________________________________________________

21. **Did you know that there are the National Parks in the North of Montenegro?**
1. Yes
2. No

22. **What sources did you use to get information about the National Park?**
1. I already knew before
2. Information and recommendation from relatives / friend
3. Magazines/brochures of NP
4. Reports/advertising in media
5. Internet
6. Other

23. **What activities would you like to do in this National Park? (no more than three answers, RANK PLEASE)**
1. Watching wild life
2. Walking and hiking
3. Mountain biking

4. Scientific visit
5. Participate in a guided tour
6. Camping
7. Photo safaris
8. Daily excursion with friends (lunch, boat on the lake)
9. Other, write out what:_________________ 

24. **All in all - How satisfied have you been with your stay in the North of Montenegro?**
1. Very satisfied
2. Rather satisfied
3. Rater not satisfied
4. Not satisfied at all

25. **And what did you not like during this holiday?**
Write out:_________________________________________
______________________________________________________________________________________________

26. **What was the most positive experience during this holiday?**
Write out:_________________________________________
______________________________________________________________________________________________
27. All in all: would you recommend holidays here in the North of Montenegro to your friends?
1. Very probably
2. Rather probably
3. Rather improbably
4. Very improbably
If “not probably” or “very improbably”, what are the main reasons:
_____________________________________________

28. How much do you spend per day for 1 adult person for accommodation and food?
Total: ___________________
Currency: ______________________

29. Do you come to the North of Montenegro during the winter?
1. Yes
2. No, why not:____________________________

PERSONAL DATA:

30. Gender
1. Female  2. Male

31. Age: ___________________

32. Civil status: Do you live with...
1. Partner
2. Family (partner and kids)
3. Single
4. Other, write out what, (i.e. Flat share)

33. What is your profession?
1. Pupil/student
2. Unemployed
3. Employed
4. Pensioner
5. Other occupation

34. Education:
1. None and primary school
2. Secondary school and Associate (2-years) College
3. University

NAME AND ADDRESS: ____________________________________________
Workshop on
Sustainable Tourism Indicators and Destination Management
Kolašin, Montenegro
(Biogradska Gora National Park)
25-27 April 2007

Programme

Tuesday, 24 April
Arrival in Montenegro and Kolašin

Wednesday, 25 April

09:00 – 09:30
Opening session – welcoming remarks
- Mr. Predrag Nenezić, Minister of Tourism and Environment of Montenegro
- Mr. Luigi Cabrini, UNWTO Regional Representative for Europe
- Mr. Dragomir Dulović, deputy president of Kolašin Municipality

09:30 – 11:00
Introductory presentations:
Tourism trends and sustainability
Mr. Luigi Cabrini, UNWTO Regional Representative for Europe
Sustainable tourism policies and tools
Dr. Richard Denman, Expert of UNWTO and the European Tourism Sustainability Group
The application of sustainable tourism indicators for destination management and monitoring. Introduction to the workshop process and methodology

Mr. Gabor Vereczi, Deputy Chief of UNWTO’s Sustainable Development of Tourism Department

11:00 – 11:15 Coffee Break
11:15 – 12:30 Development goals and strategies in the tourism sector of Montenegrin economy,
Goranka Lazović, advisor, Ministry of Tourism and Environment of Montenegro

Sustainable regional and tourism development on Bjelasica and Komovi,
Gorica Bojić, Office and project manager, Austrian – Montenegrin cooperation for sustainable development of the north of Montenegro

Development of National park “Biogradska gora” in a sense of regional sustainable development,
Darko Brajušković, director, NP “Biogradska gora”

12:30 – 13:30 Lunch
13:30 – 17:00 Field visits to the case study sites and meetings with local stakeholders (to be determined through the preparatory study)
19:30 – 21:00 Dinner

Thursday, 26 April

09:00 – 12:00 Analysis of sustainability issues at destinations (Presentation in plenary)

Situation analysis and identification of key objectives and issues of sustainable tourism in the case study area (working groups)
12.00 – 12.30 Flexible coffee break in the meantime.
Reports of working group results to plenary session

12:30 – 14:00 Lunch

14:00 – 17:30 Identification of potential indicators and monitoring methodologies that correspond to the sustainability issues
(Introduction in plenary, followed by working groups)
Flexible coffee break in the meantime

17:30 – 18:00 Reporting to plenary on working group results

19:30 – 21:00 Dinner

Friday, 27 April

09:00 – 11:00 Definition of an action and monitoring plan for destination management
(Introduction in plenary, followed by working groups)

11:00 – 11:30 Report back to plenary

11:30 – 12.30 Measurement and evaluation of the perception/satisfaction of tourists and residents (exercise in plenary)

12:30 – 14:00 Lunch

14:00 – 15:30 Data management, reporting and communication of indicators (exercise in plenary)

15:30 – 15:45 Coffee break

15:45 – 18:00 Recommendations for implementing the action plan in the case study site and to apply the indicators methodology in other destinations and regions

18:00 – 18:30 Closing remarks
<table>
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<th>No.</th>
<th>Name</th>
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</table>
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