

Tourism at Skadar Lake, Montenegro

Task: Providing information on tourism in the whole designated area, by presenting data on the existing visitors' trends; additionally, the major current initiatives to promote and foster the eco-tourism – and other forms of sustainable tourism – are to be illustrated in details.

Abbreviations

BR – Biosphere Reserve
CEED – Centre for Entrepreneurship and Economic Development
CEPF – Critical Ecosystem Partnership Fund
IBA – Important Bird Areas
IPA – Important Plant Areas
ISSP – Institute for Strategic Studies and Prognosis
IUCN - International Union for Conservation of Nature
KAP – Aluminium Plant
LTO – Local Tourism Organisation
MAB – Man and Biosphere
MNE – Montenegro
MONSTAT – Statistical Office of Montenegro
MORT - Ministry of Sustainable Development and Tourism
MSME – Micro, small and medium sized enterprise
NGO – Non Governmental Organisation
NP – National Park
NPSL – National Park Skadar Lake
NTO – National Tourism Organisation
PA- Protected areas
PAD – Project Appraisal Document
PCB - Polychlorinated biphenyls
PES – Payment for Ecosystem Services
SEA – Strategic Environmental Assessment
SH – Stakeholder
SME – Small and medium enterprises
TB – Trans Boundary
TBR – Trans Boundary Reserve
UNDP – United Nation Development Programme
UNESCO – United Nation Education Science and Culture Organisation
UNWTO - United Nations World Tourism Organization
WTTC - World Travel and Tourism Council

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1. Tourism in Montenegro

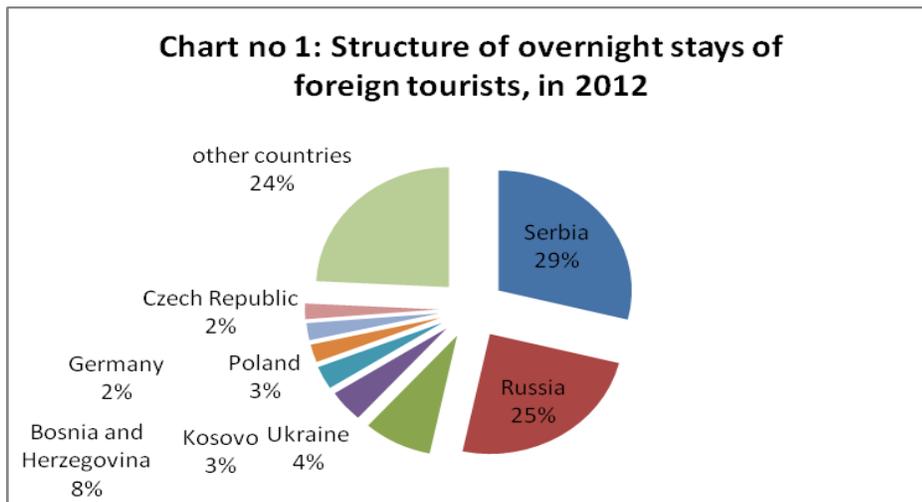
1.1 Introduction

Tourism is seen as an important factor for revitalization of rural areas, creating infrastructure developing, and opportunity for new working places, income growth decreasing migrations and for protection of cultural heritage (Lorio and Corsale, 2010). This stands for the natural heritage, too.

The Mediterranean Basin is one of the most popular tourism destinations of the world, with 220 million tourists, nearly 32 percent of the world's tourists visiting each year. Species populations in the hotspots have become fragmented and isolated because of infrastructure development mainly triggered by the tourism industry. Damage to water resources resulting from major water investments and climate change has become the most important pressure on nature (CEPF, 2010).

1.2 Statistics

According to MONSTAT statistical office annual reports, in Montenegro in 2012 tourists realised 1.439.500 arrivals which is 4.8% more in comparison with the previous year 2011, while they made 9.151.236 overnight stays which is 4.3% more than in 2011. Overnight stays of domestic tourists represent 11.1%, while the foreign tourists represent 88.9% of all overnight stays in 2012. Concerning the structure of overnight stays of foreign tourists, in 2012, the most of them were realised by tourists from Serbia (28.9%), Russia (24.4%), Bosnia and Herzegovina (8.3%), Ukraine (4.3%), Kosovo (3.1%), Poland (2.4%), Germany (2.3%), and Czech Republic (2.1%). Tourists from other countries realised 24.2% overnight stays. Concerning the structure of overnight stays by type of resort, the most of them were realized in seaside resorts (96.8%), in mountain resorts (1.2%), in capital city (1.1%).¹



¹ In Montenegro in 2010 tourists realised 1 262 985 arrivals which is 4.6% more than in 2009. They made 7 964 893 overnight stays: 12.4% by domestic and 87.6% by foreign tourists. Compared to 2009, the number of overnight stays in 2010 increased by 5.5%. Concerning the structure of overnight stays of foreign tourists the most of them were realised by tourists from Serbia (26.3%), Russia (15.3%), Bosnia and Herzegovina (9.2%), Kosovo (5.2%), France (2.9%), Italy (2.5%), Albania (2.4%), and Hungary (2.3%). Concerning the structure of overnight stays by type of resort, the most of them were realised in seaside resorts (96.0%), in mountain resorts (1.5%), in capital city (1.4%), than in other tourist resorts and other resorts.

1.3 Tourism development in Montenegro

As per World Travel and Tourism Council (WTTC) report on Tourism Trends and Prospects in Montenegro (2011), there is 4-5% increase in international tourism receipts in 2010 after a decline of nearly 8% in 2009. Overall, in the 5 years (2005-2010) international tourism receipts increased by an estimated 17% per annum in nominal terms, second only to Serbia with 22%. Even more significantly, the WTTC/Oxford Economics research findings suggest that, over the next 10 years, Montenegro will enjoy annual growth in visitor exports of around 9.4%, more than a double the world average of 4.3% and nearly 3 times the regional average of 3.5%.

The development of alternative tourism products, such as health and, golf and other sporting facilities, as well as growing nature based tourism facilities and opportunities, upgrading on winter tourism accommodation capacity are all important steps toward the strategic goal of positioning Montenegro as a year-round destination.

Survey conducted by the NTO of Montenegro among Western Europe visitors showed that one of the most unsatisfactory elements of visiting Montenegro is the road transport, characterised by poor conditions.

According to the data from Ministry of Sustainable Development and Tourism (MORT), 16.2% of total accommodations (in terms of total beds) in 2010 are in hotels. More than 96% of total accommodation is concentrated along the coastal areas. However, around 44% of accommodation capacities are below the level required by the international market.

In the five years, from 2005 to 2010, direct and indirect employment in tourism sector grew between 29% and 36%, and the sector's direct and indirect contribution to GDP grew between 50% and 60%. The sector's relative contribution to the country's GDP is the 24th of 181 countries. It is the world's 14th most rapid growing destination.

1.4 Tourism development in rural and protected areas in Montenegro

Human development levels in the most of the rural and semi-rural northern regions of Montenegro lag behind national average levels. Incidence of human poverty is much higher and there is a continuous economic migration out of these regions.

Although estimates vary, according to the United Nations World Tourism Organization (UNWTO), eco-tourism globally is growing at a rate of 10-30%, making it the fastest growing sector of the world's fastest growing industry - tourism. Therefore, it is expected that eco-tourism offers new opportunities for micro and small and medium sized enterprise (MSME) investment and employment and community development. Eco-tourism has always been a niche sector in the overall rural tourism sector, but in many areas worldwide it has served as a tool for local economic development, and rural development in particular.

In Montenegro, nature based tourism represents only a small part of tourism activities, the main growth is concentrated along the coast, in the south of the country. Within this framework, protected areas (PAs) represent important locations for both domestic and international tourism. Visitor data are available for only six PAs: the four National Parks, Long Beach Ulcinj Monument of Nature and Kotor-Risan Bay World Heritage Site. Almost 275.000 visits were recorded to these locations in 2009 and more than 308.000 in 2010 (ISSP, 2011). These numbers are equivalent to just about a quarter of all recorded domestic and international visitor arrivals in Montenegro in 2010 (MONSTAT, 2011). In reality, the number of people visiting PAs is far higher than this, as these calculations are based only on those sites for which visitor records are kept.

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Recently conducted UNDP researches show that in 2010, protected areas goods and services supported the output of many different sectors of the economy, including tourism, energy, water, agriculture, and infrastructure and disaster risk reduction. However, continuing to carry out business as usual regarding the current investment levels (not even accounting the recent decrease of 50%) may cost Montenegro's economy and population more than €30 million over the next 25 years. UNDP research identified many unmet customer demands for sustainable PA products and services, and many goods provided at a low or no price to users. Tourists and recreational visitors are willing to contribute almost €19 million a year more than they currently are being charged for entry fees and there is a potential market for hikes and guided tours worth up to €3 million a year (ISSP, 2011).

2. Tourism in Skadar Lake region

1.2 Introduction

Skadar Lake region has a great tourism potential in many respects: considering the size of the water bodies, the large number of islands and surrounding mountain, as well as the richness of flora and fauna, its climate characteristics, the cultural heritage, its authentic architecture and traditional landscape, and its closeness to the Adriatic Sea. According to the international and national legal frameworks, National Park Skadar Lake can generate tourism based revenues on a sustainable and non-invasive usage of the resources. More recently, National Park activities has been oriented more toward tourism, working on products development: bird watching, hiking, educational tours, as well as building facilities such as visitor and thematic centres, improving signalisation and supporting other tourism projects and initiatives. There are two types of tourism which are especially attractive in the central part of the Skadar Lake: excursions (most of which based on a day tour by boat), and gastronomic visits. In the last five years, numerous tourists from the Montenegrin seacoast visited the Lake for various purposes: already mentioned boat tours (the majority), visits of the nature reserves (despite the limitation), kayaking, windsurfing, sailing, hiking, sport fisheries, business tourism, etc.

In spite of the protection, National Park and the local population are oriented towards the direct exploitation of natural resources. Extraction of sand and gravel in the Manastirska Tapija (close to natural reserve, IUCN category I), is still concessional activity issued by NP. There are illegal extractions taking places in different locations, too. Controlling overfishing, mostly done in a form of illegal activity is a constant combat between the protection sectors and local population. Logging of forest species such as Skadar oak and extraction of medicinal and other plants such as sage (*Salvia officinalis*) decreased these species populations to a great extent and enabled erosion of the soil.

Furthermore, there are many activities imposing anthropogenic pressures on the Lake ecosystem, present trough expansion of human population (construction, tourism, and agricultural activities expansion), introduction of invasive species, pollution, etc.

2.2 Statistic

There is no complete statistic on tourist arrivals in Skadar Lake region. Some data may be derived from the National Park Skadar Lake financial reports on the ticket sold for boat rides, sport fishing licence and similar.

The estimated number of tourist visitors of the NP has increased from 2004 to 2010, according to the recorded data of the National Park, from about 7.000 (in 2004) to 40.242 (in 2010). The exact total number of tourists visiting the NP is not available due to the lack of check point at the entrances of the NP (there are no gates); visitors enter the Park mainly on two informative-control points on water: Virpazar and Vranjina.

The tickets to the Park were charged exclusively in segment of excursion tourism on the water (i.e. cruising along the lake). The total number of this kind of tourists was 134.399, in the period from 2005-2009. The total number of registered tourists who visited the Lake in this style in 2012, was 59.885, 42.3% more than the previous season. Table 1 is showing the number of tourist having a boat excursion per place.

Table 1: Number of tourist who paid taxes on the cruise ride, 2012.

Selling place	Number of tourist
Virpazar	38.747
Vranjina	17.221
Rijeka Crnojevića	3.344
Plavnica	501
Murići	72
Žabljak Crnojevića	4
Total	59.885

In order to deal with excursion tourism in Skadar Lake waters, legal and physical entities that provide transport service at the lake are to be contracted by the National Park. The excursion tourism was mostly organized in the form of one-day tours, including lake cruising and sightseeing of natural and cultural-historical sites. During the period 2007 – 2009, the Park signed the agreement with 50 owners of vessels for passenger transport, and from 2005-2009, 24 contracts with owners of catering facilities (CEED, 2010). This sector represents the most prosperous tourist activity at the moment in the area, considering also that it does not require huge infrastructures (e.g. large supportive structures or accommodation facilities). In 2012 National Park has signed an agreement with 29 entrepreneurs, for a total of 44 vessels for tourists transport.

As mentioned earlier, in addition to boat excursions, other types of tourism are present at the National Park, such as: fishing, hiking, biking, sailing, kayaking and bird watching. Hiking tourism is organized in the largest extent in the form of one-day tours, and sometimes it includes cruise ride and educational tours where tourists are informed about the natural, cultural and historical values of the Park. In relation with fishing, National Park issued 78 annual licences for sport fishing and 116 one day licences for fishing in 2012. Table 2 illustrates the income generated by the various sectors related to tourism organised by the National Park Skadar Lake, showing clearly where most of the activities are concentrated.

Table 2: Financial inflow from some of the tourist activities in the Park:

Category	2011 (in €)	2012 (in €)
Entrance tickets (boat ride)	157.807,00	236.524,00
Parking	0,00	0,00
Camping	0,00	0,00
Entrance tickets (Visitor centre)	1.452,00	1.778,00
Boat renting	0,00	0,00
Souvenirs	9.345,00	6.961,00
Bird watching	0,00	861,00
Kayak renting	0,00	1.395,00

2.3 Tourism offer and facilities

Most of the tourism offer on the Lake is not well organised, thus resulting into unsatisfactory comments from the visitors. National Park Skadar Lake offers several thematic excursions, but not to the extent that it would constitute a serious tourist offer of this region. Multi-day packages on the Skadar Lake are

rare, organized privately by locals who usually have accommodation facilities too; thought the existing accommodation capacities are very small.

It is important to mention that some of the tourism infrastructure is provided by the NP Skadar Lake prepared as the results of cooperation with international organisations.

Info and educational facilities:

There are four Visitors' Centres in the National Park Skadar Lake. They are established as educational and informative points, and to serve for marketing and promotion of the parks. The main Centre - where information on all national parks of Montenegro is given is located in Vranjina. The Centre is designed to present cultural and natural values of parks by showing its amenities (exhibition room, ethno room and presentation hall). It also contains additional supportive parts, visitor souvenir shop, information desk, meeting hall, etc. More recently established is Visitors' Centre in Virpazar (in cooperation with LTO Bar), where information on the Park and about tourist offers and facilities are provided.

Additionally, Thematic centres a USAID funded project, in Murići and Rijeka Crnojevića are made to present ethno-heritage, olive growing, fishing and other traditional activities and life of locals' through history. The Centres are located in lake dwellings that represent remains of the architecture of this area. However they have been open just for a very short period after building and remained closed up to now. In National Park Skadar Lake there are two educational paths, equipped with educational, interactive facilities, the product meant for supporting educational function of National Parks. Educational workshops for children have been organized on Education Path Lipovik and Plavnica. Still the usage is infrequent and rare.

As a part of educational and research offer in Skadar Lake area, the Educative Eco-Centre, exist in Virpazar, but is again very rarely in use. It is with equipped laboratories and accommodation facilities, meant to host "summer schools" for various types of educational and research groups, students, etc.

Hiking and biking facilities:

The National Park Skadar Lake has nine hiking paths with total length of 30km. The paths are equipped with horizontal and vertical signalization, mostly of medium-level difficulty. Five biking paths (of a total of 140km length) are of medium-level difficulty, too. The park has two paths 20km long for mountain biking. These paths, as well as mountain biking paths are not equipped with appropriate and specific signalization, because the majority of them use the horizontal and vertical signalization of hiking paths. In addition, signalization does not contain so called pictograms, which is a standard for such type of marking. Still they are not extensively in use. In the five year program of NP Skadar Lake there is a plan for increasing information level available to the tourists, as well as tourist security level.

Bird watching facilities:

Observation Towers – Skadar Lake hosts four facilities (observation towers 5m high and lifting capacity for 10 people), which represent the elements of infrastructure specialized for the tourist product – birdwatching. They are located at the most attractive places and are designed in a way that visitors can use them either individually or with guides. The problem is that in the vicinity of the towers there are no information boards. Also, some towers have worn out wood constructions. The design is also not the very best one so some of them need to be redesigned as to correspond to the specialised purpose. Also boats and equipment in hands of NP Skadar Lake staff is not very much in use for tourist guided tours, but more for research. The guide book was produced through USAID project but not in use. There are neither organized guided tours nor educated local guiders. The only tours that could be organized are lead by the few ornithologists in the country, not very easy to access for the ordinary visitor. However, there is great interest and potential for development of this product to high standards and attracting more tourists interested in birdwatching.

Wine tours infrastructure:

Wine roads have been designed, in some villages (e.g. Crmnica and Riječka) nearby the Park. They are supported with adequate signalization, but tourism still didn't take on in the villages and many wine producers are not very tourism services and customer oriented.

General conclusion on the facilities NP offers in tourism purposes is that it does not enhance in satisfying level entrepreneurship and involvement of other actors, most importantly local community and private sector. Some of the cooperation level and willingness exist when it comes to the festivals and its organisation, support and promotion, what is one of the good modalities for exploring possibilities for further development and improvement of interaction between private, NGO and governmental subjects and sectors.

At the moment tourism offer looks still in progress of being properly organised, in terms of number of tourist who could be accommodated, quality of the offer, the ratio between the villagers and the organisations involved and the level of investments. In response to a growing number of visitors, tourism enterprises (e.g. restaurants, cruising boats) have been established. Local people are becoming more and more active in organising the tourism offer of the Skadar Lake. Some of them rent out rooms, make handicrafts, prepare home-made traditional food, vine and honey, souvenirs and sell them, mostly or only during the summer season.

In the recent years the development of sailing and rowing activities has been recorded. In order to further develop different aspects of sports tourism, a specific support is needed, whether from the National Park Skadar Lake or from other institution (to be established) in order to help the operators.

In addition, activities such as nature and culture festivals, which were implemented by the Office of the pilot project for the development of the Skadar Lake, as well as many smaller types of events organized by local communities in cooperation with NGOs, helped the lake to become more popular through promotion of its products and attractions, especially among the urban populations who tend to neglect the Lake either for tourism and/or recreational purposes.

Furthermore, the lake area has recently recorded a significant presence of the so-called "weekend tourists", who mostly renovated old houses with the aim of using them for short term staying. Their most common activity at the lake is sport fishing.

Food and drinks offer currently represents the best organised and the most attractive part of tourist services around the lake; a further amelioration of the hospitality sector, as part of the more general service sector, is expected in the years to come, most likely driven by the private initiative. Restaurants in the local environment have a reputation for quality leads, typical cuisine (e.g. Fish dishes) and they are a favourite place for locals and tourists. About 10 of them are active and are mostly located at the lake's shores (Virpazar, Vranjina, R. Crnojevica, Murici, Karuč,). There are 8 registered wineries in this region, thus it is necessary to perform better promotion of degustation of these wines, etc. There are producers of honey, olives, cheese, too

A further tourism valorisation of the lake is closely linked with its great cultural and historical heritage. All monuments and monumental buildings on the lake are protected by law; recently, specific funds for restoration and the practical usage function giving are in progres (eg. the fort Besac in Virpazar obtained the funds to complete the restoration, currently Zabljak Crnojevica is under preparation of the participative study for its valorisation).

Accommodation at the very lake is quite modest. There are about 30 hotel rooms, with a total of 75 beds. The existing accommodation is mostly located in Virpazar (hotels 'July 13' and 'Pelikan', and

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apartments 'Labeatis'). The offer has expanded by the opening of the facility in Plavnica with about 30 rooms and 6 suites. Other hotels and accommodations, like Gazivoda, are in need of renovation.

The offer of private accommodation is not huge but does exist. There are local people who offer a decent accommodation at affordable prices, and even some foreigners living in the area offer higher level accommodation facilities, packages and tours in their organisation. Some of the accommodation that is offered to tourists is on a very low level, not registered and with poor facilities and presentation (some of these can be found in Rijeka Crnojevica).

Local transport providers and excursion organizers do represent the most dominant business developed in the recent years, in combination with the accommodation providers. Infrastructure, apart from the main connections with the railway, main road and airport is badly developed.

Without giving clear directions for development, without indicators for monitoring, NP Skadar Lake is not in control of tourism development and pressures generated by this sector on the protected area. To mitigate the lack of capacities and mandates, improve planning and implementation, the education, involvement and empowerment of local SHs deem necessary.

Therefore, it is necessary to establish management body that would work on vision, strategy and integrated tourist offer of the region, boost promotion of Skadar Lake tourist offers and include it in overall tourist offer of Montenegro.

2.4 Eco- tourism development directions

The complex set of ecosystems offers great possibilities for tourism development, by having at the same place high-quality natural and cultural landscapes. A proper use of these unique resources, could offer additional elements for local development initiatives to be further generated, therefore alleviating some of the poverty issues. The whole area of National Park is managed by promoting a low impact human activity regime, which – to a certain extent – may prevent a more structured and organised development. And on the other side illegal activities are taking a great share of economy in the area. There are also areas where the traditional land use is still present, in particular in the agricultural practices. The lifestyle of the past generations is considered a tradition that should be preserved and revitalized. Tourism on the Lake has been recently becoming a new economic activity for the local people, by creating a new compartment of the local economy. The majority of the respondents (76%) within a study carried out by Perunicic (2010), see the tourism as a future type of business that would enable the sustainable use of the Skadar Lake resources. In the Strategy for Agriculture and Rural Development (2006), it is also noted that the diversification of the economic activities, that should generate significant income to rural population, will be especially related to special forms of tourism (agro and rural). Tourism has a long-term perspective in Montenegro. Tourism Master Plan until 2020 indicates Skadar Lake as one of the three main development pilot project area. These projects illustrate the principles of integrated and sustainable tourism development. It is noted that it is necessary to implement a strategy for an innovative form of sustainable tourism. The aim of this strategy would be to create a unique "ecological experience with the characteristics of the local environment" for nature lovers, sportsmen and hikers. Key elements of such tourism products are natural, quiet and peace places, while the key activities are observation and study of nature, walking and hiking, fishing, sailing and similar. The development of a tourism product at Skadar Lake will be based on high quality nature and recreational tourism, according to the Tourism Masterplan till 2020. The area will be promoted as excursion destinations from the coast. Therefore the document aims at attracting incoming tourists seeking for high quality specialised product, associated with nature and recreation. The Tourism

Masterplan therefore envisages several opportunities to access the region; namely, as an excursion destination, a place for recreation, sports and nature tourism and for nautical, agricultural and transit tourism. Networking with the coast is a critical aspect of the strategy, as this will provide urgently needed relief to the main resorts at peak times and contribute to extending the season. Significant development of local scenic roads, attractions, and trails need to take place to realise this aim (SEA, 2008). The small castle of Žabljak, the market of Virpazar and the tiny villages, narrow patchworks of fields and ruins of deserted monasteries in the rocky cliffs in the hinterland of Skadar Lake are very appealing tourist scenery. The Tourism Masterplan refers to the landscape, lake, and flora and fauna in the National Park, also cultural-historic heritage and charm of the picturesque villages, gastronomy and traditions of the region's hinterland. The main tourism products envisaged within the Masterplan are based on an active nature experience, and local culture and history. In order to build upon these themes, linking all the attractions in the surroundings of the Lake could be realised through development of biking and hiking activities. In Skadar Lake National Park the Masterplan also aims to build on the landscape, wildlife and culture (monasteries, farming and fishing villages, castles and bridges) through a combination of high-quality hotels, SMEs and excursions from the coast, based on ecologically compatible recreational activities. Rijeka Crnojevica, Virpazar and a site to be selected on the southern shore will by that idea become centres for nature tourism with the option of cross-border expansion.

As to realise some of the strategic directions listed above and some of the current trends and opportunities local population need to be involved in economic and management issues, planning and implementation. This could be done through engagement in management of NPSL or by establishing a local sustainable development organisation for the Skadar Lake region.

2.5 Conflicts

There are strong conflicts between the purpose of the Skadar Lake as a National Park / Ramsar site / IPA / IBA place and the demands for the use of its natural resources.

Today, the population density in the wider zone around the park is higher, and therefore the pressures on the resources of the lake are stronger, especially in terms of urbanisation pressures. This is not the case inside the borders of the NP where demographic trends are negative. The main activities are concentrated on the primary sector (mainly agriculture and fishery) while industries and services providers are almost absent. Population migration in the area represents a big threat for the region. **Migration** is changing the demographic profile of settlements in the area on both sides of the border—populations are aging and declining in rural villages as young people migrate to urban areas. Pensioners represent about 15% of rural settlements in Montenegro, and over 30 % in some villages. While the population is declining over most of the proposed TBR area, it has increased 2.5 times in the agricultural Zeta plain (north side of the Lake. one of the most intensively cultivated areas of Montenegro) since 1990 (PAD, 2008). During the last ten years, due to deteriorating socio-economic conditions of life movements of population were recorded from rural to urban areas. This was the case with settlements in the region of Skadar Lake. The emigration phenomena left in the Skadar Lake area mostly elderly people who are by birth and traditions very linked with their territories; additionally, many return to spend their the last part of their lives, once retired. The still poor living conditions in most of the villages drives young people to look for better opportunities in the urban settlements.

Interest in living in rural areas every year is declining. Prospects for employment in most communities of the Skadar Lake region are weak and mainly associated with agriculture, tourism and fishing. However, many problems in these industries discourage young population for permanent settlement in these areas. Support to development of the ecologically sound business through production and

promotion of healthy food products, eco-tourism activities and accompanying services, promotion and branding, would stimulate growth and employment in the area especially important for young people.

Two major phenomena can be observed; on the one hand, the migration from the villages of the area towards other more developed destinations in the country, which results into population distribution unbalances and habitat lost, and second, the increased number of tourist, illegal building construction, large quantities of solid waste and wastewater, expansion of the arable land, an increased usage of pesticides, illegal or legal fishing (CEED, 2006), etc. ***Situation in the region of Skadar Lake is quite sensitive from the aspects of cultural and national assets that need conservation against uncontrolled development and usage of them, different protection and development authorities again, and other stakeholders interaction.***

Development of hotels, infrastructure and the expansion of settlements also represent a threat to the biodiversity of Skadar Lake due to changes from natural habitats to semi-natural and urban habitats. The development of tourism resorts and infrastructure may lead to irreversible impacts on the landscape, and 'unspoiled' character of large areas of the Skadar Lake region.

Despite mitigation and avoidance measures mentioned in the Masterplan, residual impacts are likely in relation to the **disturbance of wildlife and habitats**, particularly spawning and nesting grounds, as a result of tourist activities on the Lake. In addition, any increase in hunting or fishing as a result of greater visitor numbers to the National Park may also result in uncontrolled and excessive exploitation of biological resources.

The MNE Spatial Plan (2020) emphasizes **illegal and unplanned construction** as a risk factor for natural resources and economic development: Basically, illegal construction means not only illegal usurpation of the right to use land but also, typically, avoiding paying charges for utilization of public infrastructure, and thus these costs are borne by those who build and work in accordance with the law. A special problem is illegal construction in the most attractive areas, for instance, in the protected natural areas, especially when it is massive and when builders gain large profits, mainly at the expense of public interest and endangering public properties. It happens frequently that major part of technical, traffic, environmental and other requirements are not respected. Public interest is often neglected or ignored. Also, unplanned construction makes additional pressure on the natural resources and the environment, particularly regarding water pollution.

The present **tourist infrastructure and services** are almost completely lacking around Skadar Lake. The basic infrastructure will require significant upgrading and modernisation to cater for the planned growth in demand.

Little consideration is given to the interests of **local communities** in the Tourism Masterplan till 2020, and in other strategic document and plans. However, conflicts are emerging between essential conservation measures around Skadar Lake and private initiatives seeking sources of income. In addition, the strategy should seek to ensure that the Masterplan's objectives are fully supported at the local level from the outset, by incorporating grass-roots development projects and public consultation (SEA, 2008). Having noted this, ***the development of this area need to be built up on a bottom up approaches that would take into serious consideration local situation and interests, in line with the national directions and documents.***

2.6. Associated tourism opportunities

The Tourism Masterplan points to significant opportunities for developers of 4-5-star hotel resorts, gastronomy and nature tourism around Skadar Lake. It is therefore recommended that developers at the coast are also encouraged to invest in sustainable tourism in the hinterland.

However, the Masterplan's vision will only be realised if the necessary investment can be attracted to develop the high-quality large hotels and smaller guesthouses and create a new service base.

Nevertheless, ***additional investment in infrastructure, the education on sustainable tourism on all levels, community involvement and strategic management of the Skadar Lake is necessary in order to make tourism a sustainable livelihood strategy. It also seems evident that a well organized and focus external support for the concept and institutional development is needed for achieving sustainability of this area.*** One of the most important tasks is to discover if tourism can be a form of sustainable development in order to achieve sustainable economy for settlements and people inside borders of the National Park. Poor households in Skadar Lake developed multiple occupations. If these households want to shift from livelihoods based on a natural resources to less environmentally vulnerable ones, then it is important to have a full understanding of all resources (natural and otherwise) that people need to access in the process of composing a strategy. Tourism cannot completely replace other forms of livelihoods especially in marginal, poor, remote settlements inhabited by old people. According to the results in all these observed places people sustained by combination of livelihood strategies by market oriented and subsistence activities, rather than specific jobs. Therefore, ***tourism should be complementing rather than replacing the existing livelihood sources leading to the diversification of activities and more completed product and destination offer.***

Based on the analysis of the situation, and potential production, it can be concluded that the area of the Lake Skadar has good potentials for production of healthy food. It is necessary to direct the activities of clustering, associations of farmers and fishermen, in a way to be able to access funds for the development and promotion of food as one of the brand potential of the region. Quality control and branding products with the purpose of placing on foreign markets are pointed out as development opportunities, while the local entrepreneurs are expected to give priority to local products. The legal framework will need to be adjusted as to recognize agricultural and tourism households as a joint venture and support the registration and development.

Additionally, a special and important resource of the lake is pure nature that surrounds it, with all its elements for major renewable energy sources (solar, wind, etc.).

2.7. Trans-boundary opportunities for joint initiatives

MAB BR transboundary framework for the region of Skadar Lake could be an excellent instrument for the coordinated development and management of the resources on both sides of the Lake in order to maximize the economic and social benefits without compromising the ecosystems.

There are some strapping differences between the two countries when it comes to Lake Skadar protected area management. There is no management body on the Albanian side of the Lake, though proclaimed protection area of a level IUCN category IV. Also there are different development plans being imposed on this ecosystem not taking into consideration its cumulative effects. Demographic changes are evident in both countries. The local population on both sides is not involved in protection of the lake but in usage of it resources. Sharing of information, knowledge and experience is a problem that both countries are facing. Lack of transparency and participative processes in planning and implementing is also a common feature. There is no join management body established, apart on the projects level, which up to now haven't been proven sustainable.

Formal partnerships will need to be developed and clear planning guidelines adopted, as to:

- Agree on critical issues, measures, gaps, roles, responsibilities, funding and actions of the two countries and the join ones.

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- Involve different institution (field and level: agriculture, tourism, protection, etc.; ministries, agencies, local institutions, individuals), in the planning process and build on different expertise and mandates.
- Support communication and coordination, between and among different SHs.
- Aligning plans and interventions, projects, strategies.
- Call for accountability.
- Educate and pass on/replicate good practices, share knowledge and approaches.

There is a great opportunity to build on some of the previous joint initiatives and projects. This would not require big funding resources but a clear and strong commitment of both countries and the relevant institutions within.

Establishment of protocols for tourism, agriculture, construction etc. would be of the great importance for cross-border corresponding development in terms of introduction of rather support measures for sustainable development.

There is also need for join planning, what could be done trough producing and endorsing joint Skadar Lake Strategy.

As a follow up activity of many projects improvement of management of protection and sustainable development, information and knowledge sharing practices needs to be implemented on both sides.

Moreover, ***establishment of permanent join trans-boundary body is a process that needs to be realised on the sustainable and long term basis.*** This could be done on the by establishing of focal points on both sides, supported with initial join planning document, to be further expanded into a formal structure.

All above mentioned activities have a great opportunity to be supported and enhanced under the international designation UNESCO TB MAB BR. The designation would support improvement of protection, sustainable development and logistic of the area, as these are the core function of the MAB Programme. The designation would further advance introduction of many useful models for development of environmental friendly economies, such as: green jobs, eco tourism initiatives, ecologically sound agriculture, Payment for Ecosystem Services (PES) approach, boost the resource mobilisation efforts of the region, etc.

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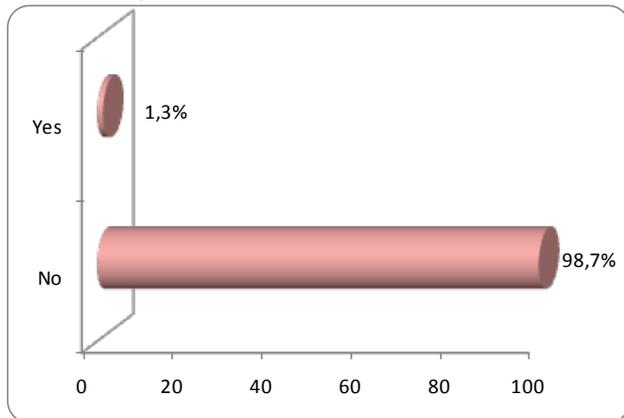
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ANNEX I

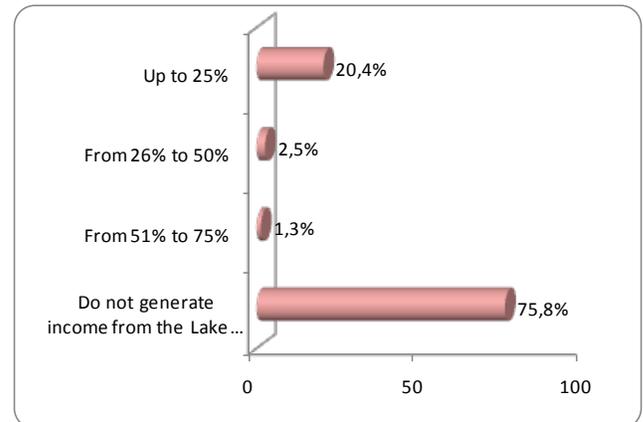
Tourism CEED 2010:

Despite the fact that tourism on Skadar Lake needs to be further improved, the population in this region succeed to provide certain funds, i.e. to achieve certain income. The existing tourism products of Skadar Lake such as recreational fishing, lake cruising, birdwatching, “wine roads”, hiking, biking, etc. offer the opportunity to achieve tourism-related earnings. When we asked respondents whether they achieve incomes from tourism, only 1.3% (2 respondents) said that they achieved income by renting rooms and fish sale on the Lake Scadar, Graph 3. The respondents do not own required permits for these activities. Out of the total number of respondents, only one stated that he sells fish to tourist and owns navigation vehicle registered for €50. When we asked the respondents whether they earn income from Skadar Lake resources, the results showed that slightly more than three quarters of respondents did not earn income in this way. The rest of the respondents stated that they earned income from mentioned resources – stressing that this income ranged up to 25%.

Graph 1. Tourism-related income achieved by respondents



Graph 2. Total income percentage achieved from lake resources



Tourist organizations in municipalities Podgorica and Bar pointed out that certain measures have been undertaken regarding the Skadar Lake promotion in terms of Lake Values Promotion, by informative and promotional activities. On June 5 - the World Environmental Protection Day, the educative-promotional cruising for the media was organized. Tourist organizations also participate in presentations and working groups for the Skadar Lake region (for example in pilot project of local community development of Skadar Lake).