



BULLETIN

NEW-YEAR'S ISSUE

Ministry of Tourism of Montenegro
and
National Tourism Organisation of Montenegro



Opening statement

I hope it does not sound pretentious to say in the very first sentence that all the goals set and projected by our economic policy have been achieved.

Tourism businesses will remember the year 2004 by intensive activities to foster tourism development and create a more favourable environment for tourism operation. The year 2004 was marked by attracting investment into Montenegro tourism and its promotion and positioning within the country and abroad.

Successful cooperation has been achieved with local self governments, tourism businesses, non-governmental sector and other industries. A unique example of public-private partnership, i.e. strategic partnership of the Ministry of Tourism and the National Tourism Organisation with Montenegrin businesses has largely influenced the success of this year tourism season.

Newly reconstructed and upgraded hotel facilities, categorised and classified in accordance with international standards contributed to better quality of Montenegro tourism offer. Awareness of the importance of tourism and the benefit it brings to all the citizens of Montenegro is increasingly more pronounced, the thing that pleases me the most.

Thus, one successful tourism year is behind us and in front of us is the new and, hopefully, even more successful one. Let it do us good!



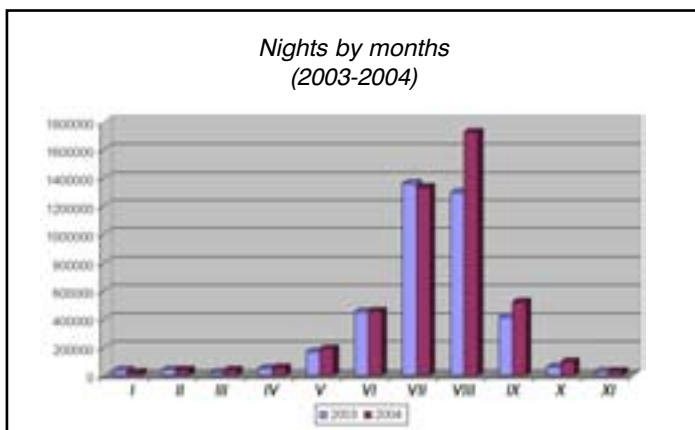
Predrag Nenezic
Minister of Tourism



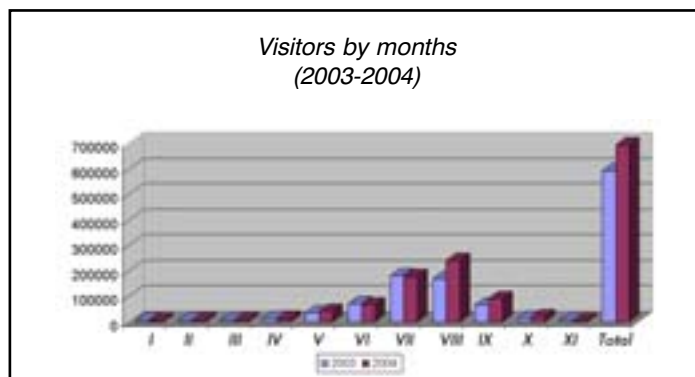
TOURISM DATA FOR MONTENEGRO FOR 11 MONTHS

According to the National Institute for Statistics, during the first eleven months of 2004 Montenegro was visited by **693,991 visitors, which is an increase of 17.02%, accounting for 4,533,720 nights, i.e. 14.66% more than last year.** Average length of stay was 6.7 days. Compared to the previous year, the number of nights **increased for 14.65%.**

Nights by months
(2003-2004)

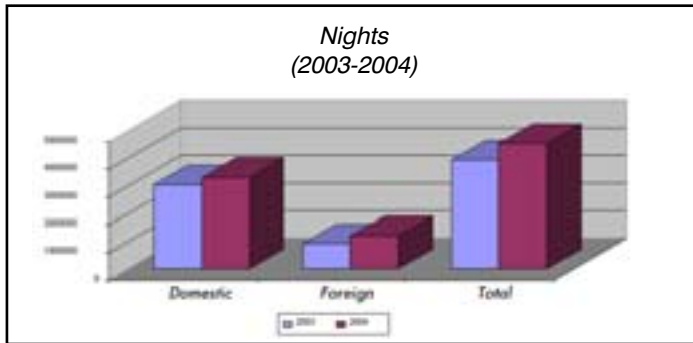


Visitors by months
(2003-2004)

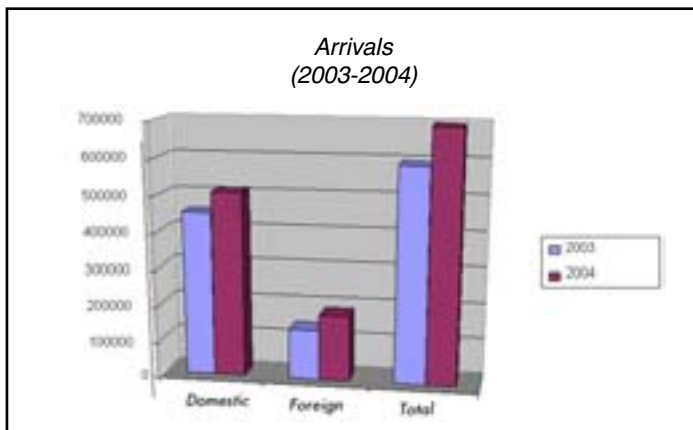


According to statistical data for eleven months this year, international visitors accounted for **1,214,371 nights, or 33.13% more** than over the same period last year.

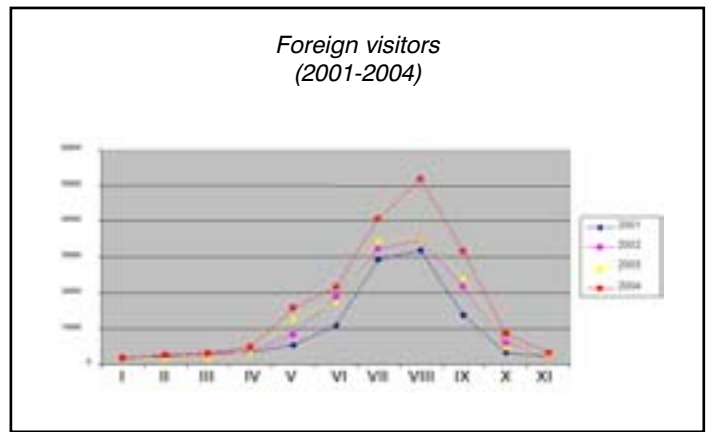
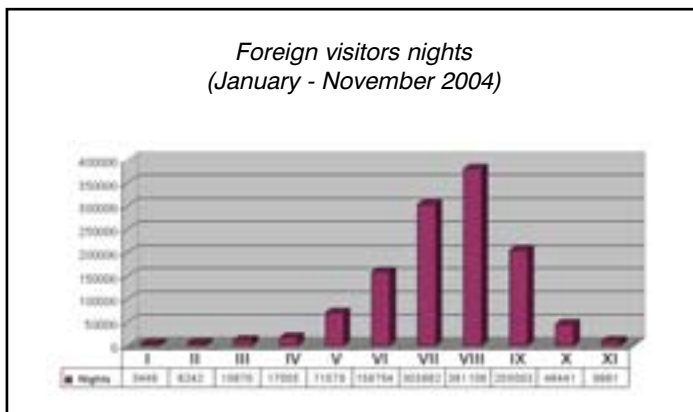
Domestic visitors accounted for **3,319,349 nights, or 9.20% more** than over the same period last year.



In 2004 Montenegro was visited by **17.02% more visitors** than over the same period last year. Out of the total number of visitors, **domestic visitors accounted for 73.37%**, and **international visitors accounted for 26.5% of total arrivals**. Domestic visitors accounted for **509,225 arrivals (an increase of 12.49% compared to the same period last year)**, and **international visitors accounted for 184,766 arrivals (an increase of 31.63%)**.

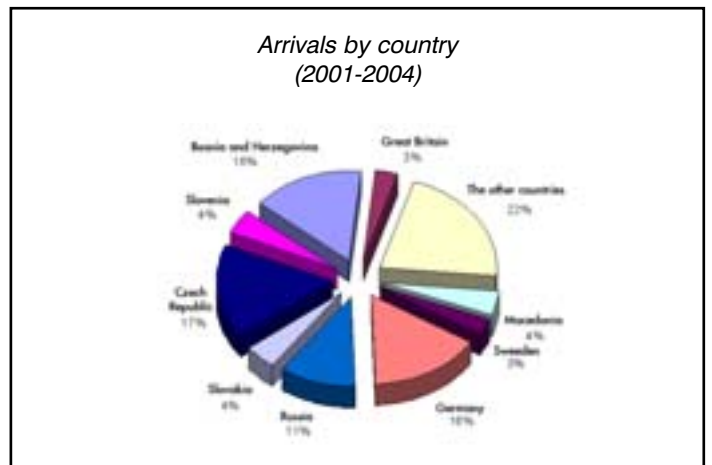


Nights of visitors from Serbia increased by 9% compared to the previous year. Launching "Summer Among Friends" campaign in several larger cities in Serbia at the start of the high summer season partly contributed to the increase in the number of visitors from Serbia. This year there has also been **an increase of 8% in the number of nights of tourists from Montenegro**. The largest number of foreign visitors stayed in Montenegro in August.

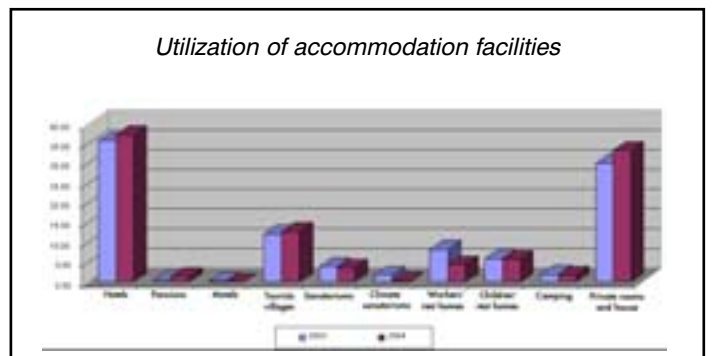


	2001	2002	2003	2004
Jan	1990	1928	2126	1597
Feb	2009	2573	1782	2414
Mar	3076	2487	1898	2955
Apr	3594	3848	3414	4758
May	5243	8302	12677	15774
June	11064	18972	17593	21676
July	28991	31992	34350	40480
Aug	31727	34621	35199	51810
Sep	13843	21960	24226	31501
Oct	3271	5764	4769	8648
Nov	2083	1835	2333	3153

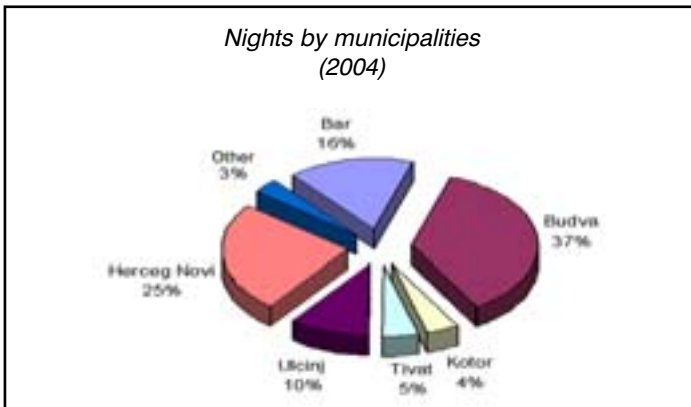
Among foreign visitors in 2004, the largest number came from Czech Republic – 17.41%, then Germany – 15.5%, Bosnia and Herzegovina – 15.5%, Russia – 10.56%, Slovenia – 4.37%, Slovakia – 4.36%, Macedonia – 4.28%, Sweden – 3.12%, and Great Britain – 2.96 %.



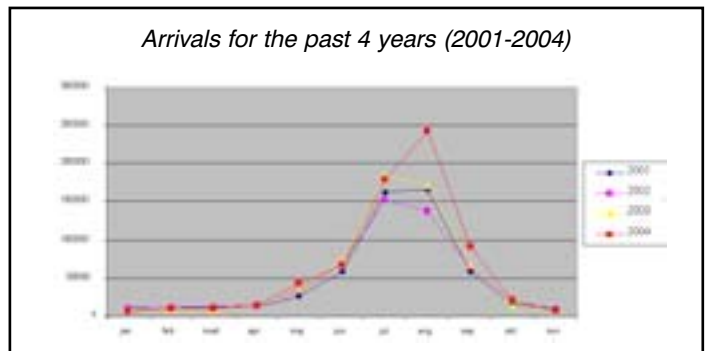
Over the first eleven months, 58.3% of all visitors used primary accommodation facilities, and 41.7% complementary accommodation.



Since Montenegro tourism is highly seasonal, and summer tourism season is mainly connected with coastal region of Montenegro, 96.7% of all nights referred to six coastal municipalities.



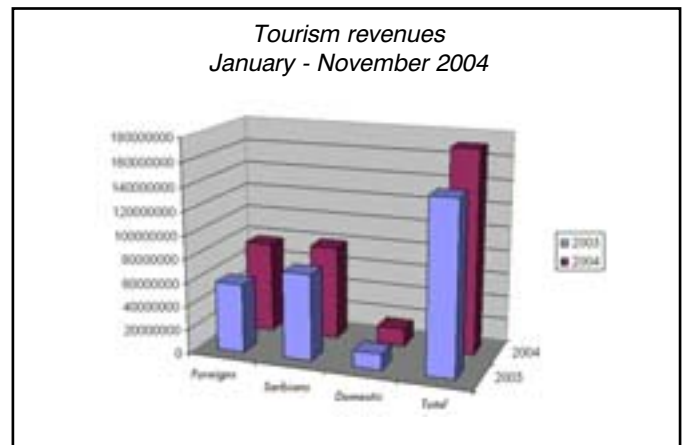
Figures for the past four years show the trend of stretching the length of summer tourist season and increased number of visitors in September as well as in October.



	2001	2002	2003	2004
Jan	11520	10450	9519	6720
Feb	10953	11648	9520	9922
Mar	12594	11194	7874	9765
Apr	12768	15584	13792	14198
May	26328	34190	37457	43697
June	58648	69184	72822	67633
July	161832	151284	182814	177957
Aug	165750	137230	169966	241916
Sep	59441	64204	68130	92867
Oct	15744	21921	13723	21242
Nov	9820	6826	7436	8074

TOURISM REVENUES

ACCORDING TO THE CENTRAL BANK DATA FOR THE FIRST ELEVEN MONTHS THIS YEAR, TOTAL TOURISM REVENUES AMOUNTED TO **€178,349,447**, which makes an **INCREASE OF 18.77 %** COMPARED TO THE SAME PERIOD LAST YEAR.



Revenues in €				
	2003	2004	Index 2004/2003	Structure 2004
Foreign	61.404.318	81.429.868	132,61	45,66
Serbian	74.049.737	81.019.127	109,4	45,43
Domestic	14.706.450	15.900.452	108,1	8,91
Total	150.160.505	178.349.447	118,77	

FOREIGN VISITOR REVENUES FOR THE FIRST ELEVEN MONTHS OF 2004 **INCREASED FOR 32.61%** COMPARED TO THE SAME PERIOD LAST YEAR, AND **REVENUES OF VISITORS FROM SERBIA INCREASED FOR 9.4%** OVER THE SAME PERIOD.

LOOKING AT THE STRUCTURE OF REVENUES FOR 2004, **REVENUES FROM VISITORS FROM SERBIA ACCOUNT FOR 45.43% OF TOTAL REVENUES**, AND **FOREIGN VISITOR REVENUES FOR 45.66%** (IN 2003 IT WAS 40.9%). AS MAY BE SEEN, **FOREIGN VISITOR REVENUES INCREASED**. **DOMESTIC VISITOR REVENUES ACCOUNT FOR 8.71%**.

COMPARED TO THE INCREASE IN THE NUMBER OF ARRIVALS AND NIGHTS FOR THE FIRST ELEVEN MONTHS OF THIS YEAR, THE INCREASE IN REVENUES IS GREATER, INDICATING THE **CHANGE OF THE STRUCTURE OF QUESTS TOWARDS HIGHER-YIELD QUESTS**.



DEVELOPMENT PROJECTS

IN COOPERATION WITH FOREIGN EXPERTS, THE MINISTRY OF TOURISM IS CURRENTLY UNDERTAKING A NUMBER OF DEVELOPMENT PROJECTS. THE ACTIVITIES WITHIN THE FOLLOWING PROJECTS ARE CURRENTLY IN PROGRESS:

- Ada Bojana
- PROGRAM FOR THE DEVELOPMENT OF MOUNTAIN TOURISM
- STRATEGIC FRAMEWORK FOR SUSTAINABLE TOURISM DEVELOPMENT AT THE NORTHERN AND CENTRAL REGION OF MONTENEGRO
- NAUTICAL TOURISM
- INTEGRAL COASTAL MANAGEMENT
- HOTEL FIT PROGRAM
- POSSIBILITIES FOR THE DEVELOPMENT OF WELLNESS TOURISM IN MONTENEGRO
- DEVELOPMENT AND UPGRADING OF NATIONAL PARK BIOGRADSKA GORA

Tourist info line

IN COOPERATION WITH MONTENEGRO TOURIST CENTRE, THIS YEAR THE TOURIST INFO LINE 9797 WAS PUT TO USE. ALSO, THE MINISTRY OF TOURISM TELEPHONE FOR COMPLAINTS AND OBJECTIONS 9817 CONTINUED OPERATION.



Promotional campaigns

THE FOLLOWING PROMOTIONAL CAMPAIGNS WERE HELD IN MONTENEGRO:

- **I KNOW A RECIPE, TOO** AIMED AT MOTIVATING THE GENERAL PUBLIC IN MONTENEGRO TO GATHER AUTHENTIC CULINARY RECIPES OF MONTENEGRO CUISINE. IT RESULTED IN 522 RECIPES BEING GATHERED, OUT OF WHICH THE COMMISSION SELECTED 22 QUALIFYING FOR THE PRIZE FUND OF 3,500 EUROS. "I KNOW A RECIPE, TOO" WAS AN INTRODUCTION FOR THIS YEAR CAMPAIGN "A YEAR OF GOOD FOOD".

- **WINTER AMONG FRIENDS TOO** IS FOCUSED ON PROMOTING MONTENEGRO WINTER TOURISM RESORTS.

- **HOT WINTER IN THE HILLS** IS

A CAMPAIGN ORGANISED BY THE NTO TO ENHANCE THE OFFER OF WINTER TOURISM



RESORTS. 6 WINTER RESORTS ARE INCLUDED IN THE CAMPAIGN - Zabljak and Kolasin, EVERY WEEKEND, ROZAJE and BERANE, 2 WEEKENDS EACH, VUCJE, LOVCEN and IVANOVA KORITA ONE WEEKEND EACH. THIS EVENT IS ORGANISED UNDER THE AUSPICES OF THE MINISTRY OF TOURISM AND THE AGENCY FOR THE DEVELOPMENT OF SME, SUPPORTED BY: SKI CENTRE BJELASICA, SKI CENTRE DURMITOR, NEW SKI CENTRE DURMITOR, SKI CENTRE TURJAK, SKI CENTRE LOKVE, SKI CENTRE VUCJE and SKI CENTRE IVANOVA KORITA.

- **BLUE FLAG** CAMPAIGN RESULTED IN 6 BEACHES BEING AWARDED THIS RENOWNED INTERNATIONAL SIGN, THE BLUE FLAG. THUS, MONTENEGRO JOINED THE GROUP OF SOME THIRTY COUNTRIES IN EUROPE WHICH HAVE INTRODUCED THIS CAMPAIGN AIMED AT POPULARISATION OF SAFE AND CLEAN BEACHES. TO QUALIFY FOR THE BLUE FLAG, BEACHES HAVE TO COMPLY WITH THE STANDARDS SET FOR WATER QUALITY, ENVIRONMENTAL EDUCATION AND INFORMATION, MANAGEMENT AND SAFETY AND SERVICES. THE INTERNATIONAL JURY AWARDED CERTIFICATES TO TROPİKANA AND MAJAMI BEACHES IN ULCIJ, MOGREN IN BUDVA, DOBREC AND CARINE IN RISAN, PLAVI HORIZONTI IN TIVAT. 12 MORE BEACHES WERE ACCEPTED AS CANDIDATES FOR BLUE FLAG FOR THE COMING YEAR.

- **LET IT BE CLEAN**

- **LET'S WELCOME OUR GUESTS WITH A SMILE** IS A CAMPAIGN TARGETING THE GENERAL PUBLIC IN MONTENEGRO TO RAISE AWARENESS REGARDING THE IMPORTANCE OF TOURISM AND ITS CONTRIBUTION TO THE BENEFIT OF ALL AND ITS IMPACT ON THE ECONOMY.

PROMOTION CAMPAIGNS AT SOURCE MARKETS

- **WINTER AMONG FRIENDS TOO** IS A CAMPAIGN TARGETED FOR THE MARKETS OF SERBIA AND VOJVODINA FOR THE WINTER TOURISM SEASON 2003-2004.

- **SUMMER AMONG FRIENDS** IS THE CONTINUATION OF THE CAMPAIGN DESIGNED FOR THE SEASON 2003.

- **A YEAR OF GOOD FOOD** UNDER THE SLOGAN DOBRO VAM UCINJELO AT THE DOMESTIC MARKET AND GIFTS & FLAVOURS OF NATURE AT THE INTERNATIONAL MARKET.



Publication of promotional MATERIAL

THE MINISTRY OF TOURISM AND THE NTO PUBLISHED SEVERAL PROMOTIONAL MATERIALS, SUCH AS: OUR LADY OF PHILERME, MAĞALOG, SEVERAL CATALOGUES – WELCOME, THE COAST, THE MOUNTAINS, WINE/DINE, THEN A TOURIST MAP, ACTIVE/EXTREME, FOLDERS, BAGS, LEAFLETS, MINI COOK BOOK, 2 BACK DROPS, 2 ROLL UPS AND "MONTENEGRO TODAY" NEWSLETTER.

EVENTS

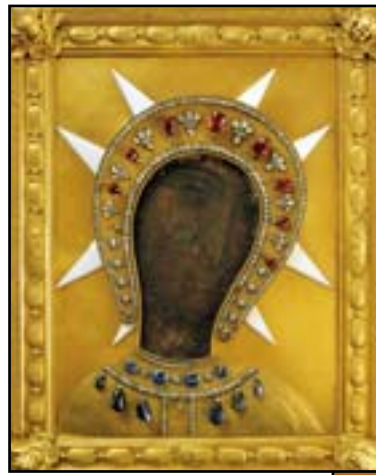
THE EVENTS AIMED AT ENHANCING TOURISM OFFER WHICH WERE SUPPORTED BY THE MINISTRY OF TOURISM AND THE NATIONAL TOURISM ORGANISATION IN 2004:

- FREE style SNOW board Cup, Open Championship in SNOWBOARD – Zabljak
- Old-timers' ENCOUNTERS, INTERNATIONAL ULTRA MARATHON – Podgorica
- World Championship in BOAT ANGLING – Tivat
- ATHLETIC Trophy of MONTENEGRO 2004 – BAR
- Days of Skadar Lake
- INTERNATIONAL CYCLIST RACE "PUTEVIMA kralja Nikole"
- Skadar Lake trophy
- BLUEBERRY Days
- LIM REGATTA
- MONTENEGRO Trophy
- FISHERMEN'S FIESTA – Bičovo
- Days of MOUNTAIN FLOWERS
- INTERNATIONAL festival of TAMBURITZA PERFORMERS – Bijelo Polje
- III INTERNATIONAL CARNIVAL – KOTOR
- THE SONG of THE MEDITERRANEAN – Budva
- ENTRANCE
- CONCERT of Vlado GEORGIJEV – HERCEG Novi
- PERPER – participation at "SUNCANE skale" festival – HERCEG Novi
- Festival of "klapa" (HARMONY SINGING CHOIRS) – PERAST
- OI in ATHENS – participation of MOC
- Infofest – Budva

Tourism signposting

IN 2004 THE STAGE THREE OF THE "TOURISM SIGNPOSTING" PROJECT WAS IMPLEMENTED THAT REFERRED TO ROADWAYS AT THE NORTH OF MONTENEGRO:

- Podgorica–Niksic–Pluzine/Savnik–Zabljak
- Podgorica–Kolasin–Mojkovac–B. Polje/Berane–Rozaje/Andrijevic–Plav
- Mojkovac–Zabljak–Pljevlja.



THUS, TOURIST INFORMATION signs and guideposts ARE NOW PLACED AT ALL MAJOR ROADS IN MONTENEGRO. ALSO, A PILOT PROJECT "TOURIST SIGNPOSTING IN URBAN CENTRES" IS CURRENTLY IN PROGRESS. SIGNS ARE BEING PLACED IN THE MUNICIPALITIES OF CETINJE AND BAR, WHILE PROJECT DOCUMENTS ARE BEING PREPARED FOR THE MUNICIPALITIES OF TIVAT AND HERCEG Novi.

STRATEGIC PARTNERSHIP of THE MINISTRY of TOURISM AND THE NTO with businesses

THE STRATEGIC PARTNERSHIP WAS SUPPORTED BY THE GOVERNMENT OF MONTENEGRO PUTTING THE MINISTRY OF TOURISM AND THE NTO IN CHARGE OF MAKING CONTACTS WITH BUSINESSES. STRATEGIC PARTNERSHIP ENTAILS PARTICIPATION IN PROMOTION AND MARKETING EFFORTS, THE RIGHT TO JOINT DECISION-MAKING, PARTICIPATION IN DEVELOPMENT AND IMPLEMENTATION OF JOINT ACTIVITIES, AGREEMENT REGARDING THE STRATEGY, CAMPAIGNS AND PROMOTIONAL ACTIVITIES. THE AGREEMENT OF STRATEGIC PARTNERSHIP WAS SIGNED WITH:



- | | | |
|--------------------------------|--------------------------|------------|
| TELECOM | MONET | CKB |
| "Trebjesa" | BREWERY FRESH&Co | HTP "Boka" |
| HOTEL GROUP "MONTENEGRO STARS" | | |
| "MARINE ZONE MANAGEMENT" | | |
| "Beppler&Jacobson" | HTP "Budvanska rivijera" | |

UPGRADING THE QUALITY OF TOURISM RESORTS

On the basis of opinions provided by the municipalities and the criteria set in the Regulations for Categorization of Tourist Resorts, the Commission for Categorization of Tourism Resorts proposed the classification of all tourism resorts in 4 categories ("A", "B", "C", "D"). The category awarded is valid for 5 years, and it may be changed, according to given procedure, if all the necessary pre-conditions are fulfilled.

The table gives the list of resorts and their categories

RESORT	CATEGORY	RESORT	CATEGORY
Andrijevića	D	Canj	A
Sutomore	A	Bar ġrad	A
Veliki Pijesak	B	Busat (Utjeġa)	B
Virpaġar	B	Bijelo Polje	C
Berane	C	Budva ġrad	A
Becici	A	Sveti Stefan-Milocer	A
Petrovac	A	Danilovġrad	D
Zabljak	A	Kolasin	B
Stoliv	B	Kotor ġrad	A
Perast	A	Risan	A
Prcaġ	A	Morinġ	B
Biġova	B	Lastva ġrbaljska	C
Mojkovac	D	Niksic	C
Plav	C	Pluzine	C
Pljevlja	C	Podġorica	B
Rozaje	C	Tivat	A
Ulcinġ	A	Iġalo	A
Herceg Novi ġrad	A	Cetinġe	B
Hercegġovska Rivijera	A	Savnik	C
(ostalo)			



www.mturizma.cg.yu



www.visit-montenegro.cg.yu



www.montenegro-cijene2004.cg.yu

PR AND PROMOTIONAL EFFORTS IN 2004

To provide for public information and have adequate preparation for the tourism season, the Ministry of Tourism had intensive PR and promotional activities. In cooperation with the NTO a **monthly bulletin** is being sent to 2000 addresses in the country and abroad.

Web sites

The Ministry of Tourism and the NTO use two web sites for promotional activities:

- www.mturizma.cg.yu
- www.visit-montenegro.cg.yu and
- www.montenegro-cijene2004.cg.yu

From 1 January - 31 August 2004 www.visit-montenegro.cg.yu had

116,623 hits, or 16% more than during the same period last year.

In cooperation with other partners, the following presentations have been designed:

- www.mtc.cg.yu
- www.turizamcg.com
- www.montenegroextreme.cg.yu
- www.krstarica.com

ACTIVITIES TO FOSTER TOURISM DEVELOPMENT

Business forum "Montenegro and Cooperation Perspectives" Moscow 2004

Mr Milo Djukanovic, Prime Minister, headed the delegation of Montenegrin Government and industry that participated at the business forum entitled "Montenegro and Cooperation Perspectives", held in Moscow on 17 and 18th December this year. It was so far the largest gathering of Montenegrin and Russian business communities and industry.

During the forum, Mr Djukanovic, President of Montenegrin Government, and Mr Yuri Lushkov, the Mayor of Moscow, signed a Protocol of Cooperation between the governments of Moscow and Montenegro.

Addressing the guests and participants of the business forum, the mayor of Moscow emphasised that Montenegro is one of the most attractive tourism destinations for the citizens of Russian Federation and announced strong cooperation with Montenegro in the field of tourism, civil engineering and building construction and banking inviting Russian companies to invest in Montenegro.



The Protocol envisages establishing cooperation in tourism with projected objective that half of all visitors to Montenegro come from Russian Federation. It also envisages the increase of direct investment in tourism and infrastructure in Montenegro, cooperation among small and medium size companies and establishing direct air lines Moscow–Podgorica and Moscow–Tivat.

Protocol of Cooperation between Podgorica and central administrative unit of Moscow for the coming two years was signed by Dr Miomir Mugosa, Mayor of Podgorica, and Mr Sergey Badiakov, Moscow prefect.

Mr Predrag Nenezic, Minister of Tourism, delivered a presentation of the possibilities for investment in Montenegro. During the two-day forum tourism offer and resources of Montenegro were presented as well.

There was also a round table discussion with the topic of "The possibilities for cooperation and investment in Montenegro" where the participants from Montenegrin delegation were Predrag Nenezic, Minister of Tourism, Milutin Simovic, Minister of Agriculture, Andrija Lompar, Minister of Transport and Branko Vujovic, director of the Agency for Economic Restructuring and Foreign Investment.

The Montenegro delegation set up several exhibit stands at the forum venue presenting: the Ministry of Tourism, National Tourism Organisation of Montenegro, Municipality of Podgorica, "Airports of Montenegro", "Marine Zone Management", Directorate for development of SME, "Plantaze", hotel company "Budvanska rivijera", hotel group "Montenegro Stars", "4. jul" hotel, Nega tours, Moskovskaja Trasovaja Group, "As" hotel, UTA CG, Association of hotel and restaurant operators of Montenegro and Russian tour operators.

It was agreed to establish a pull of travel agents and tour operators consisting of Russian and Montenegrin members. Also, a visit was arranged for travel agents, tour operators and media from Moscow, headed by prefect of CAO Moscow to agree on specific arrangements for tourism season 2005. It has been scheduled for February next year.

Action plan

At its session held on 14 October this year, the Government of Montenegro adopted the Action Plan for the preparation of the winter tourism season 2004/2005. Also the Action Plan for the preparation of summer tourism season 2005 was adopted.

Hotel privatisation

Through international public tenders 19 hotels were privatised in Montenegro. The total sale price value is €30.5 mil, while total planned investment amounts to €80.5 mil.

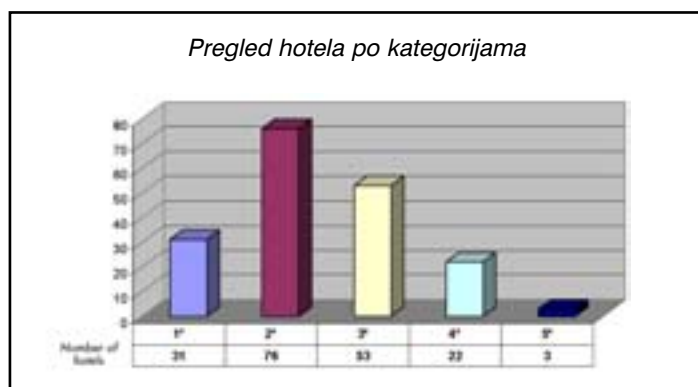
For the first eight months 2004, 8 hotels have been privatised for the total sale price of €10.7 mil and planned investment of €25.5 mil. The hotels which were sold are: □Splendid□ in Becici, □Rivijera□ in Njivice, □Topla□ in Herceg Novi, □Centar□ in Herceg Novi, □Podgorica□ in Podgorica, □Panorama□ in Becici, □Ježera□ in Zabljak and □Zabljak□ in Zabljak.

Now international tenders have been announced for 3 more hotels. □Planinka□ hotel in Zabljak and □Galeb□, and □Mediteran□ in Ulcinj.

A number of renovated hotels were opened for this season, namely: "Rivijera" – Petrovac, "Montenegro" – Becici, "Maestral" – Pržno and "Mediteran" – Becici. Also, the new hotel "Blue star" was opened in Budva.

Categorisation of hospitality establishments

The Commission for standards and categorisation of lodging and catering establishments awarded categories to 185 establishments. It is expected that by the end of this year some 200 establishments will have been categorised.



Hotel Panorama

Montenegro Hotel Catalogue



The Ministry of Tourism and the National Tourism Organisation published a catalogue of all categorised hotels in Montenegro. It was published in early November and contains information regarding hotel facilities and amenities. It was translated into English, German, Italian, Czech and Russian. The Catalogue was promoted at the Tourism Fair in London and distributed to a large number of hotel operators and travel agencies in Montenegro, Serbia, Macedonia, Bosnia, Czech Republic, Slovakia, Hungary, Slovenia and Austria.

Cooperation with NGOs

In order to enhance tourism offer, the Ministry of Tourism has continued its successful cooperation of long standing with the nongovernmental sector. In early March 2004 the Ministry of Tourism announced a competition for supporting NGO projects in the area of:

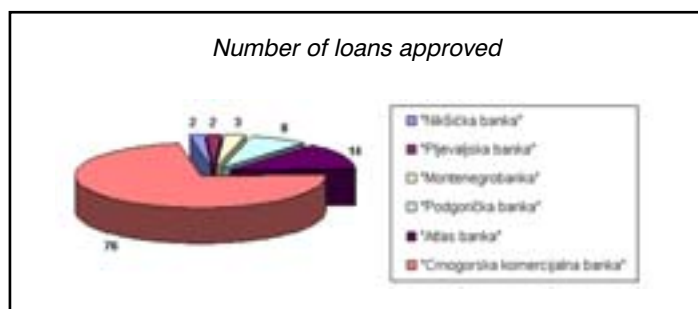
- promotion of tourism and environmental resources in Montenegro;
- development of village, hunting, sport (extreme), excursion and cultural tourism;
- cooperation on preserving natural and cultural heritage in function of tourism development;
- joint training programmes;
- design and implementation of Montenegro tourism promotion etc.

Over 80 NGOs from Montenegro applied for the funds, some of them with two or more projects. Due to this level of interest and the quality of project proposals, the budget (€60,000) was exceeded for some 20% and these funds were provided by the Ministry of Tourism.

Loans for SME

Some 4 million euros have been provided for this project and will be distributed through 4 credit lines: development of mini hotels, extra services, upgrading current facilities and village tourism. The aim of the project is to foster the development of private sector tourism offer, both qualitatively and quantitatively, especially regarding extra services, accommodation facilities, promotion of family businesses, additional employment and stretching the length of tourism season.

The Ministry of Tourism offered expert and financial support and provided subsidies for the preparation of business plans and investment projects for the projects which were eventually supported by the banks.



Setting up local tourism organisations

Local Tourism Organisations were set up in Bar Budva, Kolašin, Ročaje and Tivat. The agreement was reached to take over the staff from former Tourist Information Centres and leave the assets of former TICs at the disposal of municipalities.

Local Tourism Organisations are now being established in the municipalities of Kotor, Podgorica, Bijelo Polje, Ulcinj, Zabljak and Herceg Novi.

The Ministry provided support to local self-governments in establishing local tourism organisations by drafting proposals for all the acts necessary for establishment and operation of these local organisations. It will also initiate passing the decision on the establishment of the National Tourism Organisation that is to be adopted by the Government of Montenegro.

"A year of good food" campaign

This year the National Tourism Organisation of Montenegro and the Ministry of Tourism, in cooperation with their strategic part-



ners and tourism businesses, have launched "A Year of Good Food" campaign with the slogan "Dobro vam ucinjelo (Gifts & Flavours of Nature)".

This campaign, aimed at improving the quality and standardising the offer of Montenegrin national cuisine, ended on 11th December. At the ceremony organised at "Grand " hotel in Cetinje, the most successful campaign promoters were given awards by Mr Vojin Vlhovic, director of NTO.

The Ministry of Tourism and the National Tourism Organisation were supported by ten strategic partners (Telekom, Monet, CKB, "Trebjesa" Brewery, Fresh & Co, JP Marine Zone Management, Hotel group Montenegro stars, "Beppler&Jacobson", HTP Budvanska rivijera and HTP Boka).

103 restaurants and hotels were included in the campaign, undertaking to offer, apart from their standard menus, also the special Montenegrin menu. In accordance with the predetermined criteria, the operation of restaurants was monitored by the Commission, having renowned culinary experts, school professors and hotel and restaurants chefs onboard. In June, July, August and September they visited restaurants and at the end of each month Gastro Club Mitrovic made reports for all the establishments against the agreed parameters (national menu, food quality, stickers and other advertising material visibly posted).

Within the campaign, some promotion materials were also published: "Wine&Dine" brochure and leaflet, "Mini cook book, and "Look for this sign" leaflet. The logo of the campaign was printed on all promotion materials like folders, aprons, bags, banners and stickers.

Video clips of the campaign were broadcasted in Montenegro on TV IN, Pink M, in Serbia on RTS, TV Pink, TV BK, TV Studio B, TV Pink, in BIH and on Satellite programme.

Tourism Satellite Account

Montenegrin Ministry of Tourism, in cooperation with the World Travel and Tourism Council (WTTC) and Oxford Economic Forecasting (OEF), completed the introduction of Tourism Satellite Account (TSA) for Montenegro. The first WTTC Report for Montenegro was presented at the Congress Hall of the Government of Montenegro on 2nd July 2004.

Tourism Satellite Account is a model for calculating total financial results and impact of tourism on the overall economy. The

model has been developed since 1990 and approved by the United Nations Statistical Commission in 2000. It is now applied to more than 170 countries worldwide and is a standardised framework for organising statistical data.

WTTC estimates for 2004 show that tourism industry of Montenegro currently represents 14.8% of total GDP and is expected to increase its share to 21.1% by 2014.

Similarly, Travel & Tourism in Montenegro today accounts for 14.9 per cent of total employment, and this is forecast to rise to 21.3 per cent by 2014.

WTTC estimates capital investment in tourism economy in 2004 to €42.8 million or 14.8% of total investments. By the year 2014 total capital investment will increase to €121.2 million or 20.4% of total investment.

Furthermore, WTTC projected annualised growth of 10.3% in total travel and tourism demand which, if realised, would make Montenegro the fastest growing travel and tourism economy over the coming decade.

Tourism is forecast to become the leading export sector of Montenegro economy, generating highest foreign revenues and having the potential to diversify its economy, foster entrepreneurship, especially small and medium size enterprises, catalyse investments, generate a large number of sustainable jobs and help the social development of communities.

Donor Conference at Cetinje

In order to provide information to international stakeholders and seek their support for the project "Prerequisites for Tourism Development at the coastal region of Montenegro", the Government of Montenegro and the coastal municipalities and Cetinje organised a donor conference at "Grand" hotel in Cetinje on 9th July.

The conference was attended by representatives of many renowned business and financial corporations and diplomats of USA, Germany, Great Britain, France, Italy, Switzerland, China,



Greece, Czech Republic, Slovakia, USAID, the Council of Europe and OSCE.

For the projects planned to be implemented during the coming tourism season, some €35 million is needed, 13 million for water supply, 15 million for waste water treatment and 7 million for improving power supply.

US Congress approved \$12 million for the projects of economic development and environmental protection. In line with the Tourism Master plan, focusing on the development of tourism by the year 2020, infrastructure projects were given emphasis as a prerequisite for creating quality tourism offer that would contribute to faster development of Montenegro economy.

Professional development of tourism personnel

In cooperation with Slovenian partners, the Ministry of Tourism has organised intensive training courses and seminars, further trainings and re-qualifications for people employed in tourism sector.

Through the Employment Office, we established cooperation with academic and training institutions in Germany that has resulted in seminars organised in that country.

We are currently having preliminary talks with Italian partners to create conditions for establishing the Montenegrin-Italian Tourism Academy, that would be located in Montenegro and Italian partners would provide teaching and

training experts in tourism.

Animators

Within its overall preparation for the summer tourism season 2004, and aiming to provide for better service delivery at hospitality establishments and developed beaches, the Ministry of Tourism has organised training for new generations of tourist animators.

In cooperation with the Faculty of Tourism and Hotel Management from Kotor and Tourism College from Portorose, this year seminar was held at "Grand" hotel in Cetinje, from 12 to 19 June 2004 for 20 trainees.

The aim was to enhance the quality of animation as an important segment of competitive tourism offer. Upon successful completion of the 7-day training course, a number of animators were offered jobs at hotels and hotel beaches.



Calendar of Events for Mimosa Festivities 2005

Wednesday, 2nd February

HERCEG NOVI ART EXHIBITION, "Josip Bepo Benkovic" Gallery, 19.00

Friday, 4th February

FLORAL EXHIBITION, 10.00
OFFICIAL OPENING OF 36th "PRAZNIK MIMOZE" ROCK CONCERT, Trg Nikole Djurkovic, 19.00

Saturday, 5th February

MIMOSA, FISH AND VINE FIESTA, Baosici, Kumbor, Djenovici, 9.00

Saturday, 5th February
CHILDREN'S MASKED BALL, Baosici, "Babilon", 15.00

Saturday, 5th February

NIGHT OF FOLKLORE, KUD "ILIJA KISIC" AND GUESTS, "Park" Hall, 18.00
MASKED BALL, 21.00

Sunday, 6th February

CHILDREN'S MASKED BALL, 15.00

Tuesday, 8th February

PRESENTATION OF THE BOOK "REC-RIJECI" by Velizar Boskovic, EXCERPTS READ by Tanja Boskovic, 19.00

Thursday, 10th February

THEATRE PERFORMANCE OF ATELJE 212, "Park" Hall, 20.00

Friday, 11th February

ENCOUNTERS OF TOURISM JOURNALISTS OF SAM, Iqalo Institute, 12.00

Saturday, 12th February

HERCEG NOVI CARNIVAL, Skver, 11.00
MASKED BALL, 15.00

Sunday, 13th February

CHILDREN'S MASKED BALL, 15.00

Monday, 14th February

"NASA MILA BOKO", exhibition of best works from the ART COMPETITION OF THE "KATURIC" Gallery and Army Club, Army Club, 18.00

Tuesday, 15th February

PRESENTATION OF EDIT PIAFFE BOOK, 19.00

Tuesday, 15th February

EDIT PIAFFE MUSICAL, 20.30

Wednesday, 16th February

EXHIBITION "SERBIAN AND YUGOSLAV AUDIO HISTORY", Iqalo Institute, 20.00

Thursday, 17th February

ART EXHIBITION, "Spinaker" Gallery, 19.00

Friday, 18th February

KLAPA SONGS, Iqalo Institute, 20.00

Saturday, 19th February

THEATRE PERFORMANCE, "Park" Hall, 20.00



CALENDAR OF EVENTS FOR "HOT WINTER IN THE HILLS 2005"

ZABLJAK

Thursday, 30 December

Savin kuk – 12.00h, Mc Marko
Town Square, 12.00h – Santa Claus – New
Year's program animator and DJ – gifts

Saturday, 01 January

Savin kuk New Year's program – quiz
(animator and DJ)

Sunday, 02 January

Savin kuk New Year's program – Snow
games (animator, DJ)

Monday, 03 January

Savin kuk New Year's dance (animator, DJ)

Tuesday, 04 January

Savin kuk New Year's sport program (ani-
mator and DJ)

Friday, 07 January

Savin kuk, "Karaoke" Animator and DJ,
Planinka Hotel, 21.00h
Boris Rezak, Mc Marko at ski track

Saturday, 08 January

Savin kuk, Masked Games, animator, DJ
Jezera Hotel 21.00h – Marija Serifovic

Sunday, 09 January

Savin kuk, Sport games – animator, DJ

Friday, 14 January

Savin kuk, Summer Games– animator, DJ
Planinka Hotel, 21.00h, Mico Vujovic

Saturday, 15 January

Savin kuk, Sport games – animator, DJ
Jezera Hotel, 21.00h–Slaven Knezovic
Savin kuk, 12:00h
Presentation of traditional cuisine of
Montenegro

Sunday, 16 January

Savin kuk, Sport games – animator, DJ

Friday, 21 January

Savin kuk, karaoke–animator – DJ
Jezera Hotel, 21.00h
Aleksandra Radovic
Planinka–Made in Montenegro

Saturday, 22 January

Savin kuk, Games without frontiers–ani-
mator– DJ
Planinka Hotel, 21.00h
Marko and Marsel
Savin kuk–Made in Montenegro

Sunday, 23 January

Savin kuk, Cowboy Day – animator – DJ

Friday, 28 January

Savin kuk, music quiz – animator –DJ
Planinka Hotel, 21.00h – Jellena
Centre for culture, children's play
"Vuk i jarici", 17:00h

Saturday, 29 January

Savin kuk, Montenegrin games–animator
and DJ
Balloon ride
Jezera Hotel, 21.00h
Bato Vujosevic

Sunday, 30 January

Savin kuk, Sweet Day animator – DJ,
Balloon ride

Friday, 04 February

Savin kuk, animator cocktail–animator
and DJ
Jezera Hotel, 21.00h
Bojan Marovic

Saturday, 05 February

Savin kuk, mountain games– animator
and DJ,
Planinka Hotel
Masked ball
Balloon ride (extra day)

Sunday, 06 February

Savin kuk, Fruit Day– animator and DJ,
Balloon ride (extra day)

Friday, 11 February

Savin kuk, Olympics– animator, DJ
Planinka Hotel, 21.00h
Sergej Cetkovic

Saturday, 12 February

Savin kuk, The Best Snowman, animator
Jezera Hotel, 21.00h
Ceca Slavkovic

Sunday, 13 February

Savin kuk, quiz – animator and DJ

Friday, 18 February

Savin kuk, Flying start – animator DJ
Hotel, 21.00h
Ivana Popovic

Saturday, 19 February

Savin kuk, Games without Frontiers–
animator DJ
Jezera Hotel, 21.00h – Knez

Sunday, 20 February

Savin kuk, karaoke– animator DJ

Friday, 25 February

Savin kuk, Arts gathering– animator DJ
Mc Marko at the ski track
Jezera Hotel, 21.00h
Zeljko Vasic

Saturday, 26 February

Savin kuk, limbo dancing– animator DJ
Planinka Hotel, 21.00h
Tijana Dapcevic

Sunday, 27 February

Savin kuk, See You Again! –
animator – DJ

Friday, 04 March

Planinka Hotel, 21.00h
Jankovic Trio

Saturday, 05 March

Jezera Hotel, 21.00h
Sasa Korac



ŽABLJAK

Sunday, 06 March

Savin kuk, "Golden Eagle", ski competition

Monday, 07 March

Savin kuk, "Golden Eagle", ski competition

Tuesday, 08 March

Savin kuk, X International Para ski cup

Saturday, 09 March

Savin kuk, X International Para ski cup

Thursday, 10 March

Savin kuk, X International Para ski cup

Friday, 11 March

Savin kuk, X International Para ski cup

Saturday, 12 March

Savin kuk, X International Para ski cup

Tuesday, 15 March

Savin kuk, Serbia and Montenegro Ski Championship

Wednesday, 16 March

Savin kuk, Serbia and Montenegro Ski Championship

KOLASIN

Friday, 31 December

Jezerine, 12.00h Mc Marko
Town Square, 12.00h – Santa Claus – New Year's program animator and DJ – gifts

Saturday, 01 January

Jezerine New Year's program – Snow Games (animator, DJ)

Sunday, 02 January

Jezerine New Year's program – quiz (animator, DJ)

Monday, 03 January

Jezerine New Year's sport program (animator, DJ)

Tuesday, 04 January

Jezerine New Year's Dance (animator, DJ)

Friday, 07 January

Jezerine, Masked Games, animator, DJ, 21.00h – Marija Serifovic

Saturday, 08 January

Jezerine, "Karaoke" Animator, DJ Mc Marko at ski track
21.00h – Boris Rezak

Sunday, 09 January

Jezerine, Sport games, animator, DJ

Friday, 14 January

Jezerine, Sport games, animator, DJ
21.00h – Slaven Knezovic
Made in Montenegro

Saturday, 15 January

Jezerine, Summer Games– animator, DJ
Saturday 15 January
21.00h – Mico Vujovic
Jezerine– Made in Montenegro

Sunday, 16 January

Jezerine, sport games –animator , DJ

Friday, 21 January

Jezerine, Games Without Frontiers– animator, DJ
21.00h – Marko and Marsel

Saturday, 22 January

Jezerine, karaoke–animator – DJ
21.00h – Aleksandra Radovic
12:00, Pres. of traditional cuisine

Sunday, 23 January

Jezerine, Cowboy Day–animator, DJ

Friday, 28 January

Jezerine, Music Quiz, animator, DJ
21.00h – Bato Vujosevic

Saturday, 29 January

Jezerine, Games from Montenegro – animator, DJ
21.00h – Jellena

Sunday, 30 January

Jezerine, Sweet Day, animator – DJ
Tow hall, 17.00h
Children's play "Vuk i jarici",

Friday, 04 February

Jezerine, animator cocktail– animator, DJ
Masked ball

Saturday, 05 February

Jezerine, "Golden Fox", ski competition, mountain games – animator, DJ
21.00h – Bojan Marovic

Sunday, 06 February

Jezerine "Golden Fox", ski competition, Fruit Day, animator, DJ

Friday, 11 February

Jezerine, Olympics– animator, DJ
21.00h – Ceca Slavkovic

Saturday, 12 February

Jezerine, Best Snowman, animator
21.00h – Sergej Cetkovic

Sunday, 13 February

Jezerine, quiz – animator and DJ

Friday, 18 February

Jezerine, Flying start – animator, DJ
21.00h – Knez

Saturday, 19 February

Jezerine, Games Without Frontiers – animator DJ,
Balloon ride
21.00h – Ivana Popovic

Sunday, 20 February

Jezerine, karaoke– animator, DJ,
Balloon ride

Thursday, 24 February

Jezerine, Para ski competition

Friday, 25 February

Jezerine, Artistic Gathering– animator DJ,
Para ski competition
21.00h – Tijana Dapcevic

Saturday, 26. January

Jezerine, limbo dance– animator DJ
McMarko at ski track, Para ski competition
21.00h – Zeljko Vasic

Sunday, 27 February

Jezerine, See You Again! animator, DJ

KOLAŠIN

Friday, 04 March

Jezerine, Open Ski Championship of Montenegro
21.00h – Sasa Korac

Saturday, 05. March

Jezerine, Open Ski Championship of Montenegro
21.00h – Trio Jankovic

Sunday, 06 March

Jezerine, Open Ski Championship of Montenegro

Saturday, 12 March

Jezerine, Balloon Ride(extra day)

Sunday, 13 March

Jezerine Balloon Ride (extra day)



BERANE, LOKVE

Thursday, 30 December

Town Square, 12.00h – Santa Claus – New Year's program animator and DJ – gifts

Sunday, 09 January

Berane Hotel 21.00h – Boris Rezak
Mc Marko at ski track

Saturday, 15 January

Lokve, Snow Games – animator – DJ
Hotel Berane, 21.00h
Jankovic Trio

Sunday, 16 January

Lokve, Snow Games – animator – DJ

Friday, 21 January

Berane Hotel, 21.00h – Slaven Knezovic

Saturday, 22 January

Berane Hotel, 21.00h
Bato Vujosevic

Centre for culture, Children's play
"Vuk i jarici", 17:00h

Friday, 28 January

Berane Hotel, 21.00h
Sasa Korac

Saturday, 29 January

Hotel Berane, 21.00h
Bojan Bajramovic

Friday, 04 February

Berane Hotel – Made in Montenegro
21.00h – Marko and Marsel

Saturday, 05 February

Lokve, Snow games – animator – DJ
Berane Hotel, 21.00hEN
Biljana Mitrovic
Lokve – Made in Montenegro

Sunday, 06 February

Lokve, Snow games – animator – DJ

Friday, 11. February

Hotel Berane, 21.00h
Andrijana Bozovic

Saturday, 12. February

Berane Hotel, 21.00h
Masked ball

Saturday, 19. February

Lokve, 12:00h, Presentation of traditional cuisine of Montenegro

Sunday, 20 February

Hotel Berane, 21.00h – Ivana Popovic

CETINJE, LOVCEN

Friday, 31 December

Town Square, 12.00h – Santa Claus – New Year's program animator and DJ – gifts

Sunday, 09 January

Hotel Grand 21.00h
Marija Serifovic

Saturday, 15 January

12.00h – Mc Marko at ski track

Friday, 21 January

Zetski dom, Children's play "Vuk i jarici", 17:00h

Saturday, 22 January

Snow games – animator – DJ, 12.00h – Biljana Mitrovic

Sunday, 23 January

Snow games – animator – DJ

Saturday, 29 January

12.00h, Slaven Knezovic

Saturday, 05 February

Ivanova korita, 12:00h – Presentation of traditional cuisine of Montenegro
12.00h – Bato Vujosevic

Saturday, 12 February

Made in Montenegro
Snow games – animator – DJ,
12.00h – Marko and Marsel

Sunday, 13 February

Snow games – animator – DJ

Saturday, 19 February

12.00h, Masked ball

Sunday, 20 February

12.00h – Sasa Korac

ROŽAJE, HAJLA

Thursday, 30 December

Town Square, 12.00h – Santa Claus – New Year's program animator and DJ – gifts

Saturday, 08 January

Snow games – animator – DJ

Sunday, 09 January

Snow games – animator – DJ

Thursday, 13 January

"Smiljevica", ski competition

Friday, 14 January

"Smiljevica", ski competition
21.00h, Jankovic Trio

Saturday, 15 January

"Golden Snowflake", ski competition

Sunday, 16 January

"Golden Snowflake", ski competition
Centre for culture, Children's play
"Vuk i jarici", 17:00h

Friday, 21 January

Turjak Hotel, 21.00h
Bato Vujosevic

Saturday, 22 January

Turjak Hotel, 21.00h
Slaven Knezovic

Friday, 28 January

Turjak Hotel – Made in Montenegro
Turjak Hotel, 21.00h
Bojan Bajramovic

Saturday, 29 January

Snow games – animator – DJ
Hajla – Made in Montenegro
Turjak Hotel – 21.00h – Sasa Korac

Sunday, 30 January

Snow games – animator – DJ

Friday, 04 February

Turjak Hotel, 21.00h
Biljana Mitrovic

Saturday, 05 February

Turjak Hotel, 21.00h
Marko and Marsel

Friday, 11 February

Turjak Hotel, 21.00h
Masked ball

Saturday, 21 February

Hajla, 12:00h, Presentation of traditional
cuisine of Montenegro Turjak Hotel,
21.00h
Andrijana Bozovic

Sunday, 27 February

Mc Marko at ski track

NIKŠIĆ, VUČJE

Friday, 31 December

Town Square, 12.00h – Santa Claus – New Year's program animator and DJ – presents

Saturday, 08 January

12.00h, Biljana Mitrovic

Saturday, 15 January

Theatre Hall, 17:00h
Children's play "Vuk i jarici"

Sunday, 16 January

12.00h, Mc Marko at ski track

Saturday, 29 January

12:00h, Presentation of traditional cuisine
of Montenegro

Sunday, 06 February

12.00h, Slaven Knezovic

Sunday, 13 February

12.00h, Marko and Marsel

Sunday, 20 February

12.00h, Masked ball
Made in Montenegro

Saturday, 26 February

12.00h, Sasa Korac

Sunday, 27 February

12.00h, Bato Vujosevic

Sunday, 20 March

"Vucje" Cup

Monday, 21 March

"Vucje" Cup

III KOTOR CARNIVAL CALENDAR OF MAIN EVENTS

Friday, 04 February

Opening ceremony, Trg od oruzja, 19.00

Saturday, 05 February

Traditional masked ball, "Fjord" Hotel 20.30

Sunday, 06 February

Children's masked ball Hotel "Fjord", 14.30

Wednesday, 09 February

Children's carnival show, Centre for culture, 18.00

Friday, 11 February

Cuisine of Boka
Pjaca od muzeja, 18.00

Saturday, 12 February

Children's masked ball, Hotel "Fjord", 14.30

Sunday, 13 February

Children's carnival
Main street – Trg od oruzja, 14.00

Friday, 18 February

Abrum & karnevalska papalada " ala maka"
Pjaca od kina, 19.00

Saturday, 19 February

Traditional masked ball
Hotel "Fjord", 20.30

Sunday, 20 February

Traditional carnival
Main street, 14.30
Carnival concert – Trg od oruzja