

Attracting investments in the Tourism Sector in Ulcinj, Montenegro

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ABSTRACT

The goal of this paper is to raise awareness regarding the lack of investments in the tourism sector in the Municipality of Ulcinj, Montenegro. Ulcinj, located in the southern coastal region of Montenegro has tremendous potential for becoming an elite tourist destination. However, for decades now it is being neglected of its tremendous potentiality of thriving in the tourism arena. A careful and thorough analysis of the stakeholders tasked with promoting the tourism sector will be given in this research project. Detailed analysis of the public opinion which will be gathered via survey, will be displayed throughout this project. Expert opinion, which was gathered via interviews, will be displayed thoroughly in alignment with the scope of this research. Policy recommendations will be incorporated in order to diminish the scale of the abovementioned issue.

Keywords: Investments, Tourism Sector, Ulcinj, development, social sciences

Introduction

Investments are necessary in the context of boosting the prosperity and livelihood of society. Despite this, investments can contribute positively to fostering economic growth, both at the local and national levels. Considering the broad scope that the term ‘investment’ can cover, it is necessary to point out that this paper will elaborate thoroughly and solely upon investments in the tourism sector in Ulcinj, a coastal city located in the southern region of Montenegro. Renowned organizations such as the World Bank and World Economic Forum, “strongly believe this sector can boost competitiveness, expand economic opportunity and provide a pathway to prosperity in client countries” (Hornberger & Nevill, 2011). There is a lot of truth in what has been said by Hornberger & Nevill, considering that Montenegro is a client country in itself, with a significant amount of its annual revenue coming from the tourism sector. More specifically, “Montenegro has generated €1 billion and €16 million in tourism revenue in the first eleven months of this year” (Boka News, 2019). Yet, the most important aspect that needs to be looked upon is how much of that revenue came from the Municipality of Ulcinj and are those numbers (wherever they may be) satisfactory, both at the local and national level? If not, why is that the case, and what reforms need to be implemented in order to effectively amplify the potential that the territory of Ulcinj can offer? Attaining an adequate level of growth and upgrade in the tourism sector is necessary and significant for Montenegro as a whole. However, in order to attain success at the national level, it is profoundly important to effectively utilize every aspect of available potential at the municipal level. Ulcinj, for decades now has been undermined of its tremendous potentiality in the Tourism Sector. In this sense, throughout this paper, I will look upon the investment history of Ulcinj. Additionally, I will be elaborating upon the necessity of attracting investment in Ulcinj, as that will have a tremendous positive impact on other sectors within the society, both in the short and long term at the national and municipal level. Careful analysis of the stakeholders responsible for the task of promoting the sector of tourism will be done. Their successes and failures will be presented evenly throughout this project, while potential alternatives will be presented as well as recommended.

Background Information

Lack of investments in the tourism sector are a prominent issue in Ulcinj. Distinct factors throughout time have managed to affect tourism growth in Ulcinj. Being a city that has gone through different political system changes since the beginning of the 20th century, Ulcinj has undergone many peaks and lows in many areas, especially in the tourism sector. The tourism sector of Ulcinj has always lacked a constant steady growth rate, which has happened mainly as a result of a lack of professional state and municipal planning and a high reliance on private local investments. Private investments have contributed to maintaining a hospitality culture and developing the tourism sector. However, typically these types of investments have been carried out by local individuals, local businesspeople, which do not

necessarily possess the expertise of conducting investments, which are best for the development of the city's tourism sector as a whole. It is necessary to state that it is collaborative efforts of both the private and the public sector which will inherently determine Ulcinj's prosperity in the tourism sector. Still, that is not the case in Ulcinj. These two distinct sectors work independently of one another with minimum relationship for legal purposes mainly, therefore explaining the stagnate situation.

The privatization of publicly owned zones and the destruction of former elite hotels have also had a diminishing effect on the tourism sector in Ulcinj. After World War II, during the 2nd Yugoslav era, tourists around the world, especially Germans started to shift their attention to the lowest southeastern point of then Yugoslavia, namely Ulcinj. Attractive sandy beaches, mesmerizing landscape, delicious Mediterranean cuisine, and the hospitality of Ulcinj upon many other things stood as symbols of tourism in Ulcinj. Hotel Jadran (fig. 1.0) was demolished after earthquake damages in 1979 (fig 1.1). Still, even to this day, the place remains unconstructed since it was acquired by the public enterprise 'Morsko Dobro' (Sea Wellness) company. The earthquake damages could have been repaired and Hotel Jadran would remain to this day. Now, after 41 years, the place serves for parking during the summer season, whereas during the winter remains deserted (fig. 1.3 and 1.4). Hotel Galeb (fig. 1.5) was demolished in 2008 and was purchased since then by 'Roksped', a private company. Now after 12 years, the spot remains unconstructed and serves solely as a parking zone (fig. 1.6).

A leading role in promoting tourism development in Ulcinj has its Tourism Organization. Ulcinj's Tourism Organization (TO Ulcinj) "mission is to promote the tourist offer and establish the image of Ulcinj as an attractive tourist destination, as well as to inform and promote tourism in the city as a leading economic branch in accordance with the city development strategy" (Ulcinj's Tourism Organization 2009). It was founded in 2009. Yet, how effective is this organization in promoting the tourist offer in a 3-month peak demand period during summer? While it's a great organization, founded for great purposes, it lacks effective cooperation with the municipality as well as the public, whose interest it seems to advocate.

While covering the part on 'what hasn't been done' is essential for this research project, it is also far more important to look at 'what has been done' to foster tourism. During the past two decades, there have been only a few successful investments in the municipality of Ulcinj, all of which have been started and completed in the last 5-10 years. One of these investments is the road Ulcinj – Skadar, which is a great project but does not fit rather directly in the scope of investments in the tourism sector. The other one is the Karisma Hotels (see fig. 1.7), which has proven to be quite successful in terms of attracting customers as well as employing hundreds of Ulcinjaks (term used to call a local citizen of Ulcinj). It offers 353 rooms which "are tastefully designed in a contemporary modern style and are located in two, three and four-story buildings" (Karisma Hotels Adriatic Montenegro, 2019). Yet even Karisma Adriatic Hotels and Resorts is not a new 'built from scratch' resort. It is mainly the restoration of the former Hotel Bellevue, with the construction of a few additional outdoor pools. Resource optimization has proved to be a really important factor when it comes to construction. Apart from that and from private investments from local citizens, not much has been done to foster growth in this sector by the municipal and the national government. According to the Secretariat for Finance and Budget, Ulcinj municipality has 16,009,500 euros available under its disposal for the 2020 year (Municipality of Ulcinj, 2020). Considering this amount, there is not much that one can expect in terms of local municipal investments, at least not at the desirable and needed scale. That is why it is relevant and important to address this issue at the national level as well. With a GDP of 5.04 billion euros (World Bank, 2020), a budget of around 2.1 billion annually, how much does Montenegro actually allocate towards investments in Ulcinj? In the past decade, there has been no significant investment in Ulcinj by the government of Montenegro. Instead, the government officials seem to adjust their attention in alignment with the development of other coastal cities of Montenegro, especially Budva.

There are different areas of unutilized potential to foster tourism. Ulcinj is rich in natural resources, possessing a mesmerizing 13 km sandy beach coastline, Valdano's region filled with iconic olive trees, sulfuric sea water containing healing substances, salt resources (former salt factory) etc. When speaking of hotels and resorts, a typical example displaying the unutilized potential in Ulcinj can be seen in the attached figure below (fig. 1.8). It is important

to state that the only current resort Karisma stands at the beginning edge of the 13-kilometer long beach. There are no other investments of similar nature or of the same scale in the remaining coastline. The area remains unconstructed and investments seem to be highly aspirational and out of reach currently.



Figure 1.0 Hotel Jadran ('Lajme nga Ulqini, 2011)



Figure 1.2 Hotel Jadran 1979 after earthquake (Adrovic, 2020)



Figure 1.3 – Remaining's of Hotel Jadran in 2020



Figure 1.4 – The remainings of Hotel Jadran in 2020



Figure 1.5 – Hotel Galeb. (A stroll through the pine forests of Ulcinj, 2020)



Figure 1.6 – Hotel Galeb (Adrovic, 2017)



Figure 1.7 – Karisma Hotels (UL Info, 2019)



Figure 1.8 – Karisma Hotel location on Long beach (Karisma Hotels Adriatic Montenegro, 2018)

Methodology

This section of the project will explain in detail the methodology of research used. The aim of this research project is to analyze the issue of the lack of investments in the tourism sector in Ulcinj. In order to effectively discuss the abovementioned issue of lack of investments, both primary and secondary research methods have been utilized. The primary research conducted consists of interviews and surveys. Interviews were conducted with credible individuals for the topic, whose information will be incorporated more thoroughly in this project paper, considering that there are no sufficient secondary data with a specific focus on the lack of investments in Ulcinj. Surveys have been utilized in order to get a better comprehension of the public opinion regarding the situation of investments in the tourism sector in Ulcinj. For linguistic preferences of Ulcinj's society, the surveys have been distributed in Albanian. Additionally, the secondary research consists of credible national and international academic journal articles on investments in the tourism sector, government documents, newspaper articles, academic journals, and academic books (acquired through RIT Library).

Primary Research Conducted

Interviews with local and national experts have been a specific focus for authenticating this research project. Due to the pandemic situation of COVID-19, two interviews have been conducted on an online platform. Two of the interviews were done over a call, whereas the remaining other through email in the question/answer structure. The interviewees fall into different respective professions, ages, and gender. Through these, a more holistic, educated, and analytical view of the nature of the problem was collected.

1st Interview: The first interview was conducted with a highly credible individual in the realm of public policy, who has a master's degree in legal sciences and an astonishing CV of volunteer work throughout the Balkans. On many occasions, this person has been awarded different merits for the work conducted in the realm of academia and so forth. Interviewee 1 is originally from Ulcinj. He has continuously been involved with Ulcinj and to its prosperity as a city. He has been part of various deals and signed memorandums, whose purpose revolved around establishing a solid business environment for attracting investments in Montenegro. Interviewee 1 believes that by working in this field, one will give rise to opportunities for foreign direct investment of the Montenegrin Diaspora in Montenegro. Throughout the interview, he has managed to effectively explain the history of tourism in Ulcinj through three distinct time frames, 20th Century First Yugoslavia, after World War 2 Yugoslavia, and the rise of pluralism during the 1980s. Throughout these three-time frames, he has managed to discuss the political changes that Ulcinj had undergone while also linking them with the tourism sector. Interviewee 1 has provided insightful information in regards to the underutilized potentiality in the tourism sector in Ulcinj. He has elaborated upon the rise of tourism culture among Ulcinjaks through the years. Additionally, he stands as a strong critic among Ulcinj's public and private sectors, and emphasizes the lack of collaboration between the two, to establish a solid foundation for conducting business and therefore attracting investments. His comments will be displayed more thoroughly in the *Analysis* section of this project.

2nd Interview: The second interview was conducted with an individual of importance when speaking of the tourism sector in Ulcinj. Interviewee's 2 insight on the issue of lack of investments in the tourism sector is highly credible and important for this research project. Being among the board of trustees for one of Ulcinj's leading organizations whose purpose revolves around the engagement of the tourism sector in Ulcinj, interviewee 2 has been asked a couple of questions, through which has managed to effectively display this organization's short, long term goals in the tourism sector. Furthermore, interviewee 2 discussed the correlation between the municipal government and the organization.

3rd Interview: The third interview was conducted with a senior citizen of Ulcinj, who has expertise in the tourism sector, construction, and business. Interviewee's 3 insight on the issue of lack of investments is highly credible for

this research project. The interviewee's 3 lifetime expertise in these three areas will add profound value to this research project.

Survey Conducted

A survey of seventeen questions has been formulated and distributed through various online platforms. The survey has been formulated, both in English and Albanian. Because of linguistic preferences, the survey has been distributed mainly in Albanian and the responses gathered will have to be translated to English for this research project. The main focus of the survey was to get better comprehension regarding the public opinion on the issue of lack of investments in the tourism sector in Ulcinj. Because of the current pandemic of Covid19, convenience sampling was the only available sampling method utilized. As a result, 89 individuals responded. The responses to the survey will be elaborated in-depth in the *Analysis* section of this project.

Limitations on data gathering

Due to the pandemic of CoVid-19, and the strict government policies that followed afterwards in order to diminish the scale of the pandemic, the only available means of conducting, both interviews and surveys, was on an online platform. Through this means of gathering information, the possibility of doing systematic, random or strata sampling has been quite difficult, given the extraordinary circumstances of the pandemic. Therefore, with convenient sampling method through an online platform, various important aspects of the interview process might have been lost or underrepresented. Still, taking under account the current pandemic, I can say that I did some sort of selection even with convenience sampling, considering that a vast majority of respondents have been directly contacted by me. Additionally, again referring to the pandemic, there were limitation on interviews conducted, namely the interview process. In-person interviews are far more effective than online interviews, when it comes to collecting information. When speaking of secondary research, the main issue relied upon the fact that there are no academic sources concerning Ulcinj in the context of investments in the tourism sector. Even when it comes to Montenegro as a whole, there are only a few sources, which do not necessarily tackle the issue of lack of investments in the tourism sector. Therefore, international academic documents were used as substitutes for explaining detailed information in regards to investments in the tourism sector. RIT Library was one of the main databases in which these sources have been found.

Analysis of results

This section of the thesis project will elaborate upon the data gathered from the various research that has been conducted. The information gathered from interviews, surveys, and other research methods will be displayed in this section in detail, providing evidence that the lack of investments in the tourism sector in Ulcinj is a prominent issue that needs to be addressed properly.

Ulcinj's Tourism Sector evolution through three distinct time frames

As abovementioned, Interviewee 1 has managed to concisely elaborate upon the history of Ulcinj's tourism sector since the era of former Yugoslavia. Former nationalistic and political tendencies *of former Yugoslavia, post WW2 Yugoslavia*, and the *rise of pluralism* during the 80's have undermined Ulcinj of its tremendous potentiality, said Interviewee 1. Up until the end of 19th century Ulcinj plays a key role as a trading center and a shipping port, standing as a linking point for the whole region with the western hemisphere, especially Europe. With the beginning of the 20th century and the rise of first Yugoslavia, the key shipping port is reallocated in Bar, Montenegro. It is through this period, namely the beginning of 20th century that the municipality of Ulcinj shifts the attention towards the development of tourism. It is through this period that Ulcinj begins forming its well-known hospitality culture. It is not until after World War 2 that tourism begins to rise as a leading economic growth sector for Ulcinj. During 1950's and 60's, the construction of hotels begins in Ulcinj (Interviewee 1). It is during this time that is comprehended that

Ulcinj offers the best terrestrial relief for tourism development in Montenegro. Bay of Kotor has ineffective road and highway routes which make it difficult to access the city, as well as lacks in offering variety in the tourist offer. Budva, located near Bay of Kotor, does not offer nearly a third of that which Ulcinj offers. Yet, somehow most of investments meant for tourism development leaned primarily towards these two cities. During the 1970's and 1980's, coastline Riviera's begin forming. Ulcinj's Riviera stands as a beacon for tourism development. However, that glory does not last long, when the political leaders decide to shift the main cell for tourism development in Budva's Riviera (Interviewee 3). With the 1979 earthquake things begin to take a diminishing scale for Ulcinj in terms of tourism development. Many hotels which were state owned are privatized and left unconstructed. Some are even demolished, under the justification that they suffered serious unreparable damages (Hotel Jadran, See Figures 1.1 and 1.2). Yet, since then and with the privatization of the property, no construction has happened. During the 80's, the rise of different interest groups give birth to pluralism and the overall development of the tourism sector as well as the city as a whole is left aside for selfish interests of distinct interest groups (Interviewee 1). From 1980's and until 1990's, Ulcinj begins displaying its potential in the tourism sector with a variety of tourists and the longest seasonal work ever recorder, which began ultimately around April and lasted until October. Still, this did not last long, due to the nationalistic tendencies within former Yugoslavia which ultimately led towards war, beginning with the Slovenian secession from Yugoslavia in 1991. This is the period in which Ulcinj suffers a serious downfall in terms of tourism development (Interviewee 1). The situation remains relatively the same up until year 2000, after which the tourism sector of Ulcinj is saved by Albanian/Kosovar tourists. After 2006, with the independence of Montenegro from then Serbia, or what has left from Yugoslavia, the tourism sector of Ulcinj 'suffers' inexperienced and nonprofessional local investments (Interviewee 1). Since then, the situation has remained the same in terms of prospering the tourism sector. Ulcinj's hospitality culture has been cultivated over the decades, however investments are not following in the same direction.

The role of Ulcinj's Tourism Organization and challenges faced

Ulcinj's Tourism Organization was formed 10 years ago as an institution in itself within the Municipality of Ulcinj, with the aim of promoting the best tourist offer of Ulcinj in regional and European tourist fairs. The organization is a self – financing organization. The main and most fundamental activity of Ulcinj's TO is the promotion of the best tourist offer of Ulcinj, the hotel and private sector when it comes to accommodation, as well as the presentation of all natural resources, cultural and sports activities that aim to increase the level of the tourist offer as well as the length of the tourist season in the city of Ulcinj (Interviewee 2). Another important activity of this organization is monitoring the tourist season on a daily, weekly, monthly and annual basis (Interviewee 2). This monitoring is presented in terms of statistics in which the number of guests visiting the city is displayed in detail. Cooperation with local and state institutions and the non-governmental sector for the improvement and extension of the tourist season.

Ulcinj has tremendous potentiality in utilizing its natural resources. The city is blessed with access to the Adriatic sea through unique beaches - sandy beaches, gravel and quarry beaches (long beach about 13 km, Valdanos beach, beaches in the pine forest), the river Buna with the island of Ada, the Lake of Shas with the Cultural-historical area and the old town of Ulcinj (Kalaja), which is approximately 2500 years old, and immense salt resources (Interviewee 2).

All of the above are factors that we should make the most of for ensuring sustainable development in the most unique way possible, while taking under account that they are special values that not every city withholds (Interviewee 2). Global demands of vacationers from year to year change, and Ulcinj is no longer dealing with "vacationers who want to spend their vacation only on the beaches, but with vacationers-guests who want to have an active vacation. The demand for emphasizing towards natural attractions and resources are the factors that we need to evaluate in investments in cultural tourism in a multiethnic and multicultural city. We must emphasize and need to invest more in gastronomy to preserve the tradition", Interviewee 2 added. Opportunities for the development of active tourism, i.e. water sports, as well as investment in rural tourism and agro tourism are needed. These are adducts that are not currently sufficiently valorized for promoting Ulcinj's original values towards the development of the tourism sector (Interviewee 2).

Having a leading position in an organization whose purpose is to prompt development in the tourism sector, Interviewee 2 said that there has been ongoing interest of potential investors to invest in Ulcinj, however specific names could not be given due to the inability of concretizing these investments. Interviewee 2 continued to stress the diminishing effects that the privatization of former publicly owned hotels has had negative consequences for the whole sector.

Interviewee 2 also added that it is necessary to use sustainable exploitation of resources in order to ensure reliable development. The municipal government should focus on attracting investment that is sustainable and should think long term (Interviewee 2). As per Ulcinj's TO, focusing on promoting active, cultural, gastro, health and rural tourism should be amidst the top of the agenda (Interviewee 2). Additionally, investments in the public sector in the coming years should be a priority, because only with the attraction of investments in this sector we can achieve that which is vital to the tourism sector, namely prolonging the duration of the tourist season from 3 months to 12 months, Interviewee 2 added.

Unfortunately, for the past decade there have not been any significant investments in Ulcinj (Interviewee 2). There are improvements, especially to some extent in the private sector. For example, local investments on private accommodation and their constant upgrades to meet global changes. Some of these investments include, the construction of small to medium hotels, which have preserved and encouraged the hospitality culture that Ulcinj withholds. Still, these investments won't suffice to bring major change in the tourism sector, and move Ulcinj towards attaining a spot as a top notch tourism destination. (Interviewee 2). Instead, investment plans should give "prime priority to developing the types of accommodation that can earn as high an income as possible, can operate for a long season and can create many jobs and training places per guest bed" (Montenegro Tourism Development Strategy, 2020).

Ineffectiveness of Ulcinj's current and former local administration

1. To attract investments and provide solid investing conditions

With the rise of different interest groups, and a never-ending desire for power, Ulcinj has long been prey of ineffective and incredible individuals in positions of municipal leadership (Interviewee 3). As a result of selfish interests, the development of Ulcinj became stagnate and risked facing a diminishing route. Unfortunately, the policies of the last 20 years, political leaders, have been incapable of creating and establishing conditions for attracting potential investors in the public sector. Lack of city's developmental plans and detailed urban plans, as well as lack of investment in infrastructure are key factors that have caused stagnation in the city's overall development. Additionally, the central government of Montenegro has not been agile to attract real investors in the public sector in the city of Ulcinj (Interviewee 2). Their inability to establish solid foundation upon which investment could be confidently made, have started to take a negative toll on the overall prosperity of the city (Interviewee 2).

2. To control and establish measures for planned construction in the private sector

It is evident that the scale of expansive private investments of local residents is unregulated and unmonitored by the local government (Interviewee 2). As much as it has preserved the hospitality culture through decades, as much it may begin having negative consequences on the tourism sector (Interviewee 3). The main strategy that the government officials should focus on is improving the city's infrastructure, roads, pedestrian stands, bicycle stands, electricity and water supply, as well as cleanliness (Interviewee 2). A correlation between the private and the public sector needs to happen, in order to see flourishing in the tourism sector as well as in other areas (Interviewee 3).

DEG Master Plan 2001

During 2001, German's started shifting their attention toward Montenegro's coastline, with major investments, especially in Ulcinj. This interest is still apparent currently after 19 years, taking under account Germany's Federal

Association for Economic Development and Foreign Trade (BWA) interest in investing in “the tourist development potential of Montenegro with special emphasis on Ulcinj, destination which arouses great interest of German guests”, according to Montenegro Government (Government of Montenegro, 2019). Apparently, Ulcinj showed promising foundation for investment that would ensure both return on investments, as well as it could be the next elite tourist destination point. Still, leaving aside the current interests it is important to learn from past initiatives which have not been fully implemented. The DEG Master plan, formulated in 2001, was created by the German company DEG (German Investment Cooperation), whose plan was to conduct major investment throughout Montenegro’s coastline as well as Croatia’s. This masterplan was adopted by the Montenegrin government as its official tourism policy. Two cities of Montenegro are included in this masterplan for investing, namely Bay of Kotor and Ulcinj. “Project 'Ulcinj' exemplarily lays down longterm development plans for the longest undeveloped sand-beach on the Adriatic coast into a high-quality bathing destination. With a long-term goal of up to 35,000 beds, Ulcinj will become one of the largest touristic development projects in the Mediterranean” (Euroinvest, 2002). It is clear that the profound potential for tourism development that Ulicinj withholds as a city is already noted by major international investment companies. Yet, there is clear evidence on the ineffectiveness of concretizing these investment plans since 2001. This has happened mainly as a result of neglecting to establish solid foundations for carrying these investments as well as the inability of the local and national government to attract customers. Possibly the reason why DEG masterplan for Project Ulcinj has suffered lack of investment could be due to unrealistic and highly expensive sale tenders that have been established. “An area of about 19.5 km² (14.5 km² without the Island of Ada)” has been available for sale (Bickert et al, 2011). The plan was “to build six hotel-groups and mixed forms of accommodation offering a total of 25,000 to 27,000 beds”, with areas of leisure such as a golf course and a bird-watching zone included in the tender (Bickert et al, 2011). The tendered area for sale estimated costs of 1.2 billion with the Island of Ada Bojana. However, “after years of unsuccessful tendering” (Bickert et al, 2011), the Committee in charge of the tender decided to close the tender in 2009. The unrealistic prices as well as the inability of the government to become flexible in terms of establishing common ground for doing business with potential investors have led to the current situation of lack of investments in Ulcinj.

Survey Results

Profile of Respondents

Attaining public opinion in regard to the issue of lack of investments was necessary. This has been achieved through the distribution of online surveys. As a result, 131 people responded. According to figure 2 below, 47.3% were between the ages of 18-25, 22.1% between the ages of 43-51, 14.5% between the ages of 34-42, and 10.7% between the ages of 26-33. As can be seen from the survey responses the majority of respondents fall between ages 18-25, which also shows that the majority of the public opinion which has been gathered by the survey will be that of a younger generation in Ulcinj.

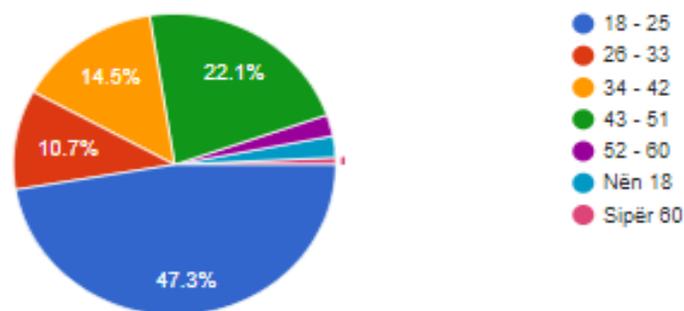


Figure 2: The age of the respondents

Translation of Figure 2 from Albanian to English

Nen 18 – Under 18

Siper 60 – Over 60



Figure 3: Respondents level of education

Translation of Figure 3 from Albanian to English

Me pak se nje diplome Gjinnazi – Less than a High School Diploma

Diplome Gjinnazi ose te kategorise se njejte – High School Diploma or equivalent

Diplome Bachelor – Bachelor's Diploma

Diplome Master – Master's Diploma

Doktorature – Doctorate Degree

As can be seen from Figure 3, 43.8 % of the respondents have a High School Diploma as their latest achievement in education. 34.4 % have achieved a Master's degree, whereas 18.8 % a Bachelor's degree. Based on these statistics, one can comprehend that the nature of the answers has been submitted by possibly educated individuals.

Tourism-related practices

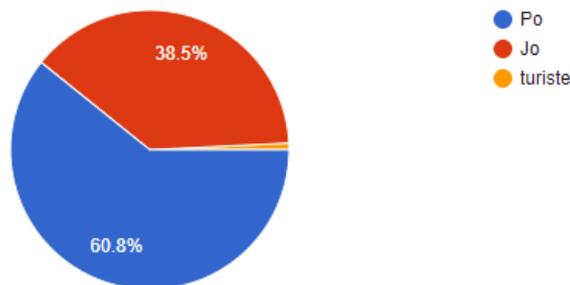


Figure 4: Accommodation owing individuals

Translation of Figure 4 from Albanian to English

Po – Yes

Jo – No

Turiste - Tourist

Figure 4 display the percentage of individuals within Ulcinj's society who own, or run a tourism related business. As can be seen, 60.8% of respondents do own or run a tourism related business, whereas 38.5% reported that they don't. 1.5 % reported that they come to Ulcinj as tourists only, meaning that they are individuals originally from Ulcinj but live elsewhere.

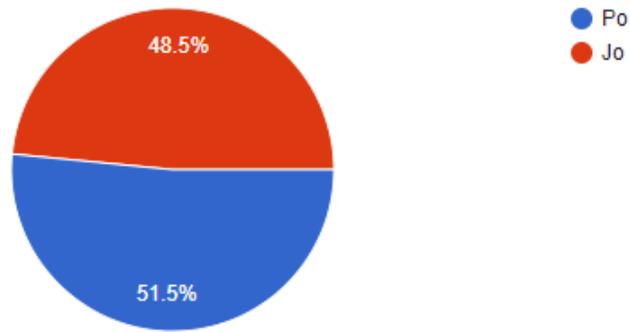


Figure 5: Tourism practices

Translation of Figure 5 from Albanian to English

Po – Yes

Jo - No

When asked the question of “Are you an employee of a tourism-related business”, 51.5% answered yes, whereas the remaining 48.5% answered no. This displays that the 48.5% that answered no, either run or own another business, or that they work on other areas which are not directly linked with tourism.

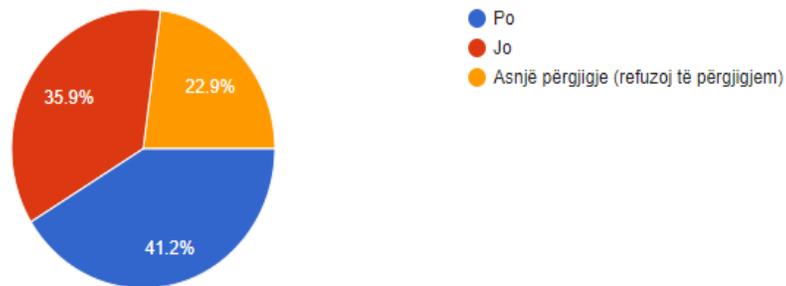


Figure 6: Income from tourism

Translation of Figure 6 from Albanian to English

Po – Yes

Jo – No

Asnje pergjigje (refuzoj te pergjigjem) – No answer (Refuse to answer)

41.2 %, that is the majority of the respondents reported that they earned the majority of their income during peak tourism season, which currently begins at the beginning of June and lasts until the end of August (Interviewee 3). This means that the majority of the annual income that surveyed individuals attain comes from the tourist season which lasts a 3 months period. This being stated, it is clear that work towards making the tourist season longer is needed. (Figure 6)

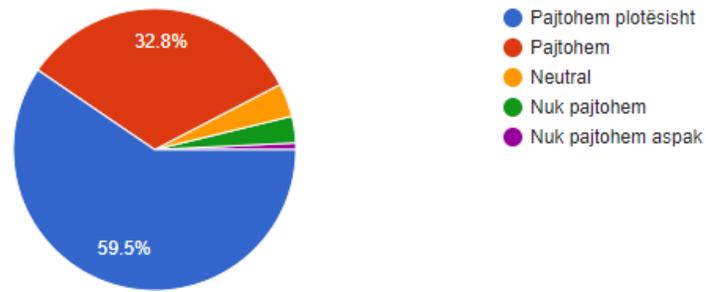


Figure 7: Importance of investing in the tourism sector

Translation of Figure 7 from Albanian to English

Pajtohem plotësisht – Strongly agree

Pajtohem – Agree

Neutral – Neutral

Nuk pajtohem – Disagree

Nuk pajtohem aspak – Strongly disagree

When asked, if the tourism sector is the most significant sector which needs to be invested upon in order to ensure economic growth, 59.5% of respondents said that they absolutely agree, and 32.8 % agreed (Figure 7). This displays that the public interest is profoundly focused on developing the tourism sector, as that they believe will contribute in the overall economic development of the city.

Additionally, when asked, which subsector of the tourism sector should be invested more thoroughly, 68 responded that the most important sub-sector should be Accommodation, meaning that investments should be allocated towards the construction of Hotels, Resorts, etc. Attractions came in a close second, with 62 respondents believing that this subsector is the most important one that will ensure economic growth. (Figure 8)

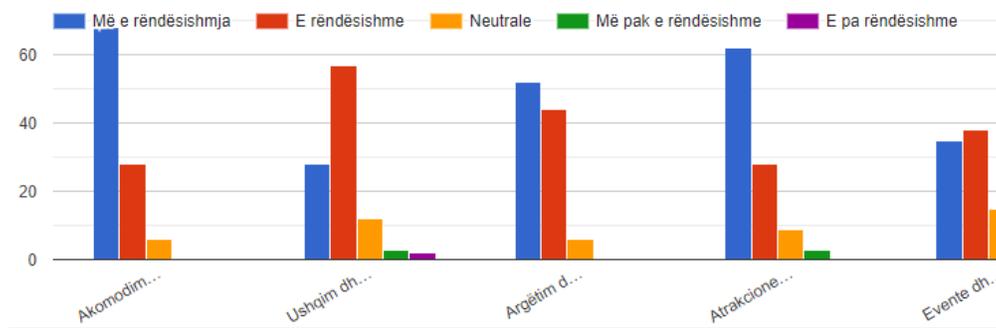


Figure 8: Subsector of the Tourism sector

Translation of Figure 8 from Albanian to English

Me e rëndësishmja – Most important

E rëndësishme – Important

Neutrale – Neutral

Me pak e rëndësishme – Less important

E pa rëndësishme – Not important

Public opinion in regards to the local administration

Another core value of this survey was to get a better comprehension of the public in regards to the local administrations that have been in office in the last 10 years. As can be seen in Figure 9, the majority of respondents, namely 53.4% believe that the municipal government has been ineffective in attracting investments in the last 10 years in Ulcinj. 9.9% believe that the leadership was very ineffective, whereas 9.2% said that they were effective.

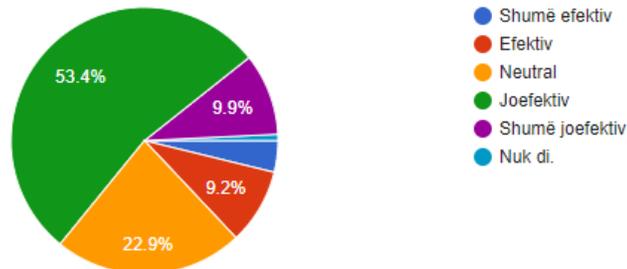


Figure 9: The effectiveness of the municipal government in the past 10 years

Translation of Figure 9 from Albanian to English

Shume efektiv – Very effective

Efektiv – Effective

Neutral – Neutral

Joefektiv – Ineffective

Shume joefektiv – Very ineffective

Nuk e di – I do not know

Furthermore, when wanting to get better comprehension of the public opinion in regards to the demolition of elite hotels in the Riviera of Ulcinj, 72.5% believe that the demolition has happened due to political reasons. Being the only major Albanian dominated municipality in Montenegro, Ulcinj may have been prey of distinct political aspiration, and that is clearly embedded in the society's consciousness (Figure 10)



Figure 10: Demolition of elite hotels

Translation of Figure 10 from Albanian to English

Pamundesia per te terhequr investiture te mundshem – Inability of attracting potential investors

Arsye ekonomike – Economical reasons

Arsye politike – Political reasons

Nuk e di – I do not know

Infrastruktura e dobët deri tek ato hotele – Weak infrastructure of hotels

Te mirat detare, vjedhja dhe korrupcioni I tokave shqiptare ulqinake – ‘Sea wellness’ organization, theft and corruption of Ulcinjak Albanian lands

Shitja ne menyre te paligjshme, politik... - Selling in unlawful way, politics...

Keqperdorime dhe korrupcion financiar – Misuse and financial corruption

Also, in the survey, individuals were asked what are some of the reasons that there is a lack of investments in Ulcinj? 47.3% said for political reasons, 28.2% said because of municipal ineffectiveness, and 9.9% said because there is a lack of investment potential. One interesting comment was also because of religious and nationality racism, as well as sold politicians (Figure 11).

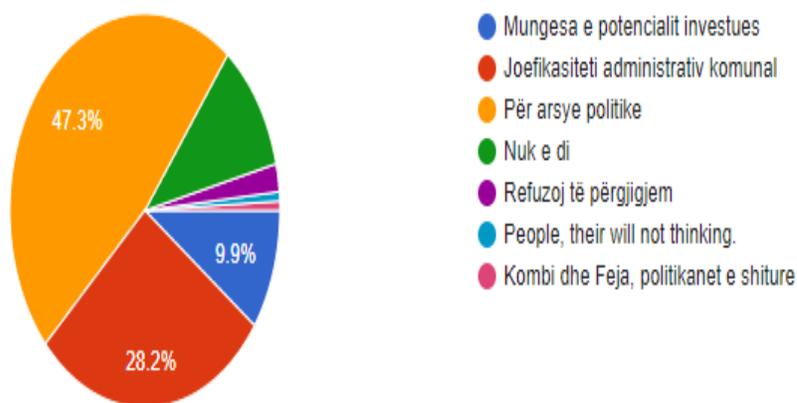


Figure 11: Lack of proper investments in Ulcinj

Translation of Figure 11 from Albanian to English

Mungesa e potencialit investues – Lack of investment potential

Joefikasiteti administrativ komunal – Ineffectiveness of the local administration

Arsye politike – Political reasons

Nuk e di – I do not know

Refuzoj te pergjigjem – Refuse to answer

Kombi dhe Feja, politikanet e shitur – Nationality and religion, corrupt politicians

Future prospects of tourism industry according to public opinion

When asked “do you believe that there will be an increase in the number of visitors in Ulcinj over the next 5 years”, 45.7 % responded maybe, 31.8% responded yes, and 22.5% responded no. This clearly indicates that the public opinion regarding the future of tourism is highly uncertain, which is quite unfortunate for a city whose major income comes from tourism-related practices (Figure 12)

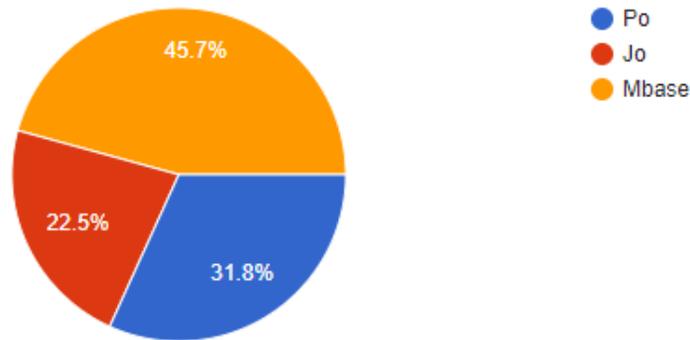


Figure 12: *Tourism in the future*

Translation of Figure 12 from Albanian to English

Po – Yes

Jo – No

Mbase - Maybe

Additionally, in order to predict the near future, surveyed individuals have been asked if there has been an improvement in revenues from a time span of 5 years. 53.5 % answered that their tourism-related revenues remained the same, 27.1% said that revenues improved, and 6.3% said that the revenues deteriorated. Considering this, and the stagnate circumstances that Ulcinj is facing in terms of investments in the tourism sector, it is highly predictable that there won't be any major improvements in the tourism sector. If the situation remains as it is, Ulcinj's economy will begin deteriorating, leading to other diminishing effects in other areas within the society.

Summarized results from the survey

The majority of survey respondents are Ulcinj's younger generation between the ages of 18-25. Out of 131 respondents, the majority are educated, meaning that a large percentage of the respondents have attained a high school, bachelor's, and master's diploma. Therefore, it can be pointed out that the survey information which was gathered was conducted by educated individuals. Additionally, the majority of surveyed individuals responded that they own or run a business related to the tourism sector and that the majority of their annual revenues come from 3 months-long period of tourism. The majority of respondents stood as strong critics of the municipal government, saying that the leadership in the past 10 years in Ulcinj municipality has been very ineffective in developing the tourism sector. Also, the majority of the 131 respondents believe that the stagnate situation of Ulcinj in terms of its development as a tourist point, has happened mainly due to politicized aspirations, in which there have been specific comments from respondents pointing out discrimination in terms of religion and nationality. Last but not least, the future prospect for tourism development seems quite unknown to the eyes of the public, as they expressed deep concerns about the rise of tourism over the next 5 years.

Conclusion and Recommendations

The aim of this research project was to analyze the issue of the lack of investments in the municipality of Ulcinj. The study stressed the importance of attracting investments in a highly promising city such as Ulcinj, as that would have positive direct and indirect effects in other fields of Ulcinj's economy. A careful analysis of the stakeholders whose primary role is the development of the tourism sector of Ulcinj has been done. Their ineffectiveness has been shown in the *Background Information* section and has been elaborated upon thoroughly in the *Analysis* section of this research project. Primary and secondary data have been utilized as parts of the research methodology to authenticate this

research project. A survey of 24 questions has been distributed via an online platform due to the limitations that the current pandemic of COVID-19 has caused. Therefore, the most realistic sampling method that could have been accomplished given the circumstances, was convenience sampling. As a result, 131 responses were gathered. Their opinion was thoroughly displayed in the *Analysis* section of this project. Apart from this, three interviews were conducted with credible individuals as well as experts, whose opinions and information added immense value to this research. The information that was gathered from the interviews was elaborated thoroughly in the *Analysis* section. Additionally, the secondary data that was gathered to authenticate this research, consists of government documents, reports, books, newspaper articles, and academic journals.

The results gathered from conducting, both primary and secondary research have justified that there is a lack of investments in the tourism sector in the municipality of Ulcinj. Furthermore, the results have shown that, both the society as well as respective experts who have leading roles in the tourism development in Ulcinj, express dissatisfaction in regards to the stagnate and deteriorating tourism sector, which is where it is because of local and national ineffectiveness to attract potential investing opportunities. There is clear evidence pointing out the lack of cooperation between the stakeholders. This lack of cooperation is evident at the local and national levels.

Based on the abovementioned, the following represent recommendations that will diminish the scale of the issue of lack of investments in the tourism sector and foster growth.

Establishing good public relations and cooperation of the local administration and national government

Ulcinj municipality, apart from the municipality of Tuzi, is the only Albanian-dominated municipality in Montenegro. This being said, for the past 20 years, the respective administrations which held office in Ulcinj, have not managed to effectively establish cooperation with the national government. Not only this, but it has not managed to effectively establish cooperation between distinct organizations whose task is promoting the development of the city. This has resulted in many negative consequences, with a major one being public indifference to politics, both at the local and national level (as has been affirmed in the survey result). As such, private uncontrolled and unmonitored investments which have been carried by local individuals have occurred. These sort of investments however, will at some point become an anti-value for the city's development. In this sense, the local administration should begin establishing good ties with the public and incorporating the public to some extent into matters that will drive prosperity in the city. Routine monitoring and regulation should be incorporated by the local administration. Additionally, the local administration should stress the importance of attracting investments in the tourism sector with the national government, as that will have overall positive effects not only at the municipal level but also at the national.

Reopening of mini-tenders that will increase the possibility of attracting investments

As has been shown throughout this thesis project, the previous master plan created by DEG (German Investments Corporation) and adopted by Montenegro as a tourism policy has failed in implementation. This has happened mainly as a result of the ineffectiveness of the national government to establish proper foundations for these investments to be made. The tender of 1.2 billion euros for the 13 km Long Beach region for example, is not feasible for many investors. The tender is very expensive, and is attainable by a very small market (Bickert et al, 2011), which in turn limits the scale and variety of potential investors. A reopening of tenders should be done. However, instead of incorporating the whole region of the Long Beach for sale, the government should decide to lease certain areas within the long beach for a period of years at reasonable price. This would draw more investing opportunities in Ulcinj. Again, it is important to point out towards the national governments willingness to actually attract investments in this part of the country. Where there is a will, a way can be found.

Collaboration between Ulcinj's Tourism Organization, the local administration, and the society

The balance between these three components will lead to promising results in the tourism sector. It is necessary to continue building up the hospitality culture that the city has carved for over a century now. There is no better way to do that than to have cooperation between the local administration, tourism organization, and the society. Interviewee

2 has reported that the number of guests that have entered Ulcinj in 2019 was 366.365, which totaled up to 2.086.385 night stays. However, it is necessary to point out that the number of guests that have entered Ulcinj the last year is considerably higher than what has been actually recorded, due to the unwillingness of certain guests to register in touristic points, Interviewee 2 added. This being said, if Ulcinj's whole society, including here the respective leading organization tasked with the promotion of the tourism sector, builds a unified approach towards the development of the city, then one can expect the situation to change for the better. Individual interests should not be completely ignored, as democracy is built upon the importance of the individual, free market, and capitalism. However, individual interests should not overshadow the greater good of society.

Being a country that generates a considerable amount of revenue from tourism, it is necessary for Montenegro to build a strong chain of coastal tourist attraction points. Equal importance to the development of each and every coastal city should be given and should be prioritized in the policymaking agenda. Investments in Ulcinj, will not only enhance the possibility of attracting tourists and thus promoting the economy at the local and national level but will also have positive effects, both directly and indirectly in other areas, therefore contributing to the overall prosperity of Montenegro as a whole.

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Appendices

Appendix 1: Informed consent for Interviewee 1

INFORMED CONSENT FORM FOR SOCIAL SCIENCE RESEARCH

RIT KOSOVO

Title of project: Attracting Investment in the Tourism Sector in Ulcinj, Montenegro

Researcher Name: Arian Marini, RIT Kosovo (A.U.K) Student

Shpëtim Robaj Street

Prishtinë 10 000, Kosovo

+38269832886; axm8778@g.rit.edu

Purpose of this project: To raise awareness regarding the issue of lack of investments in the tourism sector in Ulcinj. Additionally, this research project aims to provide background information regarding the issue, display the public opinion in regards to this subject, and explain the role of distinct stakeholder's in the tourism sector. Policy options will be presented and policy recommendations will be incorporated with the purpose of attaining a solution for this respective issue. The information gathered in this interview will be used for research purposes only.

Procedure: You will be asked to answer 9 questions during this interview

Duration: It will take roughly 45 minutes to answer these questions

Confidentiality statement: The information gathered in this interview will be treated anonymously and for research purposes only. Your identity will remain confidential.

Voluntary participation: It is your decision if you wish to take the interview. You can withdraw from the interview at any time you wish to do so.

Signature of participant

----/----/----
Date

Signature of researcher

----/----/-----
Date

Appendix 2: Informed consent for Interviewee 2
INFORMED CONSENT FORM FOR SOCIAL SCIENCE RESEARCH

RIT KOSOVO

Title of project: Attracting Investment in the Tourism Sector in Ulcinj, Montenegro

Researcher Name: Arian Marini, RIT Kosovo (A.U.K) Student

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Purpose of this project: To raise awareness regarding the issue of lack of investments in the tourism sector in Ulcinj. Additionally, this research project aims to provide background information regarding the issue, display the public opinion in regards to this subject, and explain the role of distinct stakeholders in the tourism sector. Policy options will be presented and policy recommendations will be incorporated with the purpose of attaining a solution for this respective issue. The information gathered in this interview will be used for research purposes only.

Procedure: You will be asked to answer 17 questions during this interview

Duration: It will take roughly 1 hour to answer these questions

Confidentiality statement: The information gathered in this interview will be treated anonymously and for research purposes only. Your identity will remain confidential.

Voluntary participation: It is your decision if you wish to take the interview. You can withdraw from the interview at any time you wish to do so.

Signature of participant

----/----/----
Date

Signature of researcher

----/----/----
Date

Appendix 3: Informed consent for Interviewee 3
INFORMED CONSENT FORM FOR SOCIAL SCIENCE RESEARCH

RIT KOSOVO

Title of project: Attracting Investment in the Tourism Sector in Ulcinj, Montenegro

Researcher Name: Arian Marini, RIT Kosovo (A.U.K) Student

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Purpose of this project: To raise awareness regarding the issue of lack of investments in the tourism sector in Ulcinj. Additionally, this research project aims to provide background information regarding the issue, display the public opinion in regards to this subject, and explain the role of distinct stakeholder's in the tourism sector. Policy options will be presented and policy recommendations will be incorporated with the purpose of attaining a solution for this respective issue. The information gathered in this interview will be used for research purposes only.

Procedure: You will be asked 6 questions during this interview

Duration: It will take roughly 30 minutes to answer these questions

Confidentiality statement: The information gathered in this interview will be treated anonymously and for research purposes only. Your identity will remain confidential.

Voluntary participation: It is your decision if you wish to take the interview. You can withdraw from the interview at any time you wish to do so.

Signature of participant

----/----/----
Date

Signature of researcher

----/----/----
Date

Appendix 4: Interview questions for Interviewee 1

1. In your opinion, apart from private investments of the citizens of Ulcinj, do you think that Ulcinj lacks public investment in the tourism sector?
2. Were there potential investor in the Municipality of Ulcinj in the tourism sector in the past 10 years? If so, who were they?
3. In your opinion, how effective have the political leaders of the Municipality of Ulcinj been in attracting investments in Ulcinj in the last 10 years?
4. Do you think that the tourism sector is the main sector that should be favored for development in Ulcinj?
5. In which part of the tourism sector, do you think more should be invested? Some sub-sectors in the tourism sector are: Accommodation, Entertainment and Recreation, Food and Beverage, Artificial and Natural Attractions, Events and Conferences.
6. What comparison can you make for the current situation in terms of the development of the tourism sector in Ulcinj and that from about 15 years ago (i.e. since the establishment of the Tourism Organization of Ulcinj)? Has there been development?
7. Compared to previous years, have revenues (in Euro) improved from the tourist season on annual basis?
8. Do you believe there will be an increase in the number of visitors over the next 5 years?
9. What would be your proposal to change the situation of lack of development in the tourism sector?

Appendix 5: Interview questions for Interviewee 2

1. Who are you and what is your role in Ulcinj's Tourist Organization?
2. Can you tell us about the history of the establishment of this organization?
3. What are the main activities of this organization?
4. Based on the official website of the Tourism Organization of Ulcinj, one of the main activities of the WTO of Ulcinj is "Improving and promoting original values in the municipality of Ulcinj, which can precede the development of tourism." Can you explain what that means?
5. In your opinion, apart from private investments of the citizens of Ulcinj, do you think that Ulcinj lacks public investment in the tourism sector?
6. Were there potential investing opportunities in the Municipality of Ulcinj in the tourism sector in the past 10 years? If so, can you name some of them?
7. Is it part of the agenda of the Tourist Organization to attract potential investors in the tourism sector in the municipality of Ulcinj?
8. In your opinion, how effective have the political leaders of the Municipality of Ulcinj been in attracting investments in Ulcinj in the last 10 years?
9. What are the relations of the Tourist Organization with the local administration of Ulcinj?
10. What are the relations of the Tourist Organization with Ulcinj's society?
11. Do you think that the tourism sector is the main sector that should be favored for development in Ulcinj?
12. In which part of the tourism sector, do you think more should be invested? Some sub-sectors in the tourism sector are: Accommodation, Entertainment and Recreation, Food and Beverage, Artificial and Natural Attractions, Events and Conferences.
13. What comparison can you make for the current situation in terms of the development of the tourism sector in Ulcinj and that from about 15 years ago (i.e. since the establishment of the Tourism Organization of Ulcinj)? Has there been development?
- 13a. If so, can you name some of the investments that have contributed to the development?
14. Can you tell us how many visitors Ulcinj has during a summer tourist season?
15. Compared to previous years, have the revenues (in Euro) improved from the tourist season on annual basis?
16. Do you believe there will be an increase in the number of visitors over the next 5 years?
17. What would be your proposal to change the situation of lack of development in the tourism sector?

Appendix 6: Interview question for Interviewee 3

1. How has the tourism sector developed over the years in Ulcinj?
2. What are some important areas that have contributed to the development of the tourism sector of Ulcinj?
3. When did Ulcinj have its best tourist era?
4. What do you think of the distinct administrations that have been in charge of the municipality in the last 20 years?
5. Why do you think privatization of previously state-owned hotels has happened?
6. Why do you think Ulcinj is facing a lack of investments in the tourism sector for decades now?

Appendix 7: Survey questionnaire

1. What is your age?

Under 18

18-25

26-33

34-42

43-51

52-60

Over 60

2. Do you think Ulcinj has tremendous unused potential in terms of investments in the tourism sector?

Strongly agree

Agree

Neutral

Disagree

Strongly disagree

3. Do you think there is lack of investment in the tourism sector?

Strongly agree

Agree

Neutral

Disagree

Strongly Disagree

4. How effective has the Municipal leadership been in attracting investment opportunities in Ulcinj?

Very effective

Effective

Neutral

Ineffective

Very ineffective

No answer (refuse to answer)

5. Are you aware of investments plans in Municipality of Ulcinj?

Very aware

Aware

Not aware

6. Do you have the chance to look at these investment plans in detail? (e.g. via the municipal webpage)

Yes

No

Other:

7. Do you know how many of these investment plans have started?

All of them

Some of them

None of them

I don't know

8. Do you know how many of these investment plans have been accomplished?

All of them

Some of them

None of them

I don't know

9. How did these investments effect your tourism related practices?

Significantly improved

Improved

Same

Worsened

Significantly worse

Other:

10. How often do you come across investment plans in the official municipal webpage on yearly basis?

Very often

Often

Occasionally

Rarely

Never

11. Do you think that the tourism sector is the most important sector that needs to be invested in Ulcinj?

Strongly agree

Agree

Neutral

Disagree

Strongly disagree

12. What part of Tourism sector do you believe needs to be invested more thoroughly to ensure economic growth?

(Rank in terms of importance from 1 to 5, in which 1 is the most important) Some of these subsectors include: Accommodation (Hotels, Resorts, and Apartments etc), Food and beverage, Adventure and Recreation, Attractions (Museum, landscape, monuments, amusement parks, zoo etc), Events and Conferences.

Most important

Important

Neutral

Less important

Not Important

13. Do you think that investments from abroad are a significant factor in ensuring development in the tourism sector?

Yes

No

Maybe

14. Do you believe initiatives of local citizens towards private investments on accommodation infrastructure are among the most important in contributing in the development of Ulcinj's Tourism Sector?

Strongly agree

Agree

Neutral

Disagree

Strongly disagree

15. Do you think that these private investments have contributed immensely in the development of short term/long term jobs for local citizens?

Short term yes, long term yes

Short term yes, long term no

Short term no, long term yes

Short term no, long term no

16. What are the reasons that there are no proper planned investments in the tourism sector in Ulcinj?

Municipal administrative ineffectiveness

Lack of investment potential

Political reasons

I don't know

No answer (refuse to answer)

Other:

17. What are the reasons that there has been no reconstruction of accommodation infrastructure in the demolished areas of Hotel Galeb and Hotel Jadran since 1979 (areas which have stood out as vibrant tourist accommodation points)?

Inability to attract potential investors

Political reasons

Economic reasons

I don't know

Other:

18. What do you think of Ulcinj's situation NOW in regards to investments in the tourism sector and that from 15 years ago?

Profound improvement

Improvement

Same

Worsened

Profoundly worse

Other:

19. Do you believe that there will be an increase in tourism in Ulicinj over the next 5 years?

Yes

No

Maybe

20. Do you attain the majority of your income during tourism season?

Yes

No

No answer (refuse to answer)

Other:

21. Do you own or run a tourism related business such as: Apartments, Hotels, and Motels?

Yes

No

Other:

22. Do you work as an employee for a tourism related business?

Yes

No

Other:

23. Throughout the past 5 years, how has your tourism related income been effected?

Significantly improved

Improved

Remained relatively the same

Worsened Significantly worse / No answer (refuse to answer)