



TOURISM DEVELOPMENT STRATEGY OF THE CITY OF TREBINJE FOR THE PERIOD 2020-2030

Final version

25 May 2020



Horwath HTL™

Hotel, Tourism and Leisure

Introduction

In Zagreb, 25 May 2020

Dear citizens,

We would like to express our sincere gratitude for your confidence and trust regarding the project “Tourism Development Strategy of the City of Trebinje for the period 2020-2030.”

A hundred years-long experience of Horwath HTL in the hotel, tourism and leisure industry, as well as hundreds of similar realized projects in Croatia, region and globally represent the unique strength of our company and professional team.

We have also approached this project with the desire to present, in the final stage, not only a document, but an operationally oriented instrument for managing the tourism development of Trebinje, all based on a highly inclusive planning process and the involvement of participants in tourism development at this destination from both the private and public sector.

The project was implemented through a process of combining office and field work in which the Horwath HTL expert team conducted a comprehensive field tour of selected points of tourist interest, personal and telephone interviews with key participants, analysis of the current situation based on secondary data as well as participation in the strategic planning of Trebinje as a tourist destination, through an interactive workshop.

We hereby would also like to thank all the representatives of private and public sector of Trebinje for their effort to implement this strategic document.

Below we submit the final version of the 1st and 2nd report, which together form the final document “Tourism Development Strategy of the City of Trebinje for the period 2020-2030.”

A handwritten signature in blue ink, appearing to read "Siniša Topalović".

Siniša Topalović, ISHC

Partner

Table of contents

1 Tasks and procedures	4
2 Situational and market analysis	7
2.1. General and economic situation	8
2.2. Tourist market	16
2.3. Tourist organization of Trebinje	33
2.4. Marketing	36
2.5. Tourist value chain	45
2.6. Participants mapping	56
2.7. SWOT анализа	60
2.8. Strategic conclusions	64
3 Strategic framework	67
3.1. Strategic context and tourism development grounds	68
3.2. Tourist vision, mission and positioning	72
3.3. Tourist products and tourist experience zones	77
3.4. Growth goals	88

Table of contents

4 Operational development strategies	97
4.1. Investment strategy	100
4.2. Competitiveness raising strategy	117
4.3. DMO improvement strategy (Destination Marketing Organization)	142
4.4. Strategic marketing plan	152
4.5. Tourism development supporting factors	170
5 Action plan	172
6 Annexes	182



1 Tasks and procedures

Tasks

In the first part, the tasks and procedures of this project are defined, while in the second part of the Report, a situational and market analysis is performed, which includes the following components: general and economic situation analysis, tourist market analysis, budget analysis and activities of the tourist organization, tourist value chain analysis, as well as identification and mapping stakeholder interests through an interviewing process and SWOT analysis.

Following a detailed analysis of the situation, the third part of the document defines the strategic framework for tourism development, which includes the following units: strategic development context, strategic development grounds, tourism vision, mission and tourist positioning of Trebinje, elaboration of three primary and four secondary tourist products, definition of tourist experience zones based on tourist products of Trebinje, and quantitative and qualitative goals of tourist growth.

In the fourth part of the document, 4 operational strategies for tourism development are defined, on the basis of previously defined key development measures, while supporting identified development initiatives are mostly processed separately. The operational development strategies are as follows:

1) *Investment strategy*

The Investment strategy is focused on the specific (“hard”) tourist projects that have the potential to be the subject of the offer in the domestic and international market. A total of 11 development initiatives have been defined, whereof 6 primary and 5 secondary.

2) *Competitiveness raising Strategy*

The Competitiveness raising strategy identifies key initiatives aimed at raising the general tourist offer competitiveness and destination experiences, and is more focused on “soft” initiatives, without significant investments in the infrastructure, at least at the beginning of implementation.

3) *Strategy of DMO improvement-Destination Marketing Organization*

The Strategy of DMO improvement in Trebinje proposes the new organizational structure of the Tourist organization of Trebinje and defines new development initiatives which belong to the domain of destination management and are primary responsibility of the reconstructed tourist organization.

4) *Strategic marketing plan*

The strategic marketing plan sets marketing goals, defines markets, segments, products and marketing tactics for each given market demand. It also defines the tourist marketing guidelines.

The Action plan is the fifth part of the document that defines the duration of certain activities and identifies the bodies responsible for their implementation and serves for strategies implementation monitoring

Procedures

In the process of drawing up the first report, i.e. situation analysis, the following procedures have been carried out:

- Collecting of the secondary data, necessary for situational and market analysis through the data requests submitted to the client;
- Tour of the City and its surroundings (natural resources and attractions, cultural-historical heritage and attractions, etc.);
- Field visit of Trebinje in the period of 15-18 January within which interviews with 28 local stakeholders were carried out, including public and private sector, as well as phone interviews and regular coordination with a client;
- Secondary research of all submitted and available data related to the situational and market analysis, including the following sources: rzs.rs.ba, oalley.com, dzs.hr, monstat.org, statistika.ba, stat.gov.rs, airport-dubrovnik.hr, montenegroairports.com, sarajevoworldweatheronline.com, dinarskogorje.com, UNWTO, gotrebinje.com, social media, TO Trebinje, etc.
- Analysis of the tourist value chain based on the field visits to the attractions selected in cooperation with the client.

In the process of drawing up the second report, the following procedures have been carried out:

- Interactive strategic workshop with the participants of private and public sector of Trebinje tourism;
- Collecting of the secondary data related to the existing projects and initiatives identified within Report 1 preparation phase;
- Personal and phone coordination with the client and selected participants;
- Secondary research and review of available databases of the UNWTO, Hospitality Inside, as well as rich internal databases of HORWATH HTL Zagreb, other offices of Horwath HTL, as well as numerous other sources;
- Secondary research and review of available publications for the purposes of defining tourist products profiles;
- Secondary research of comparable projects and initiatives for defining framework investment budgets.

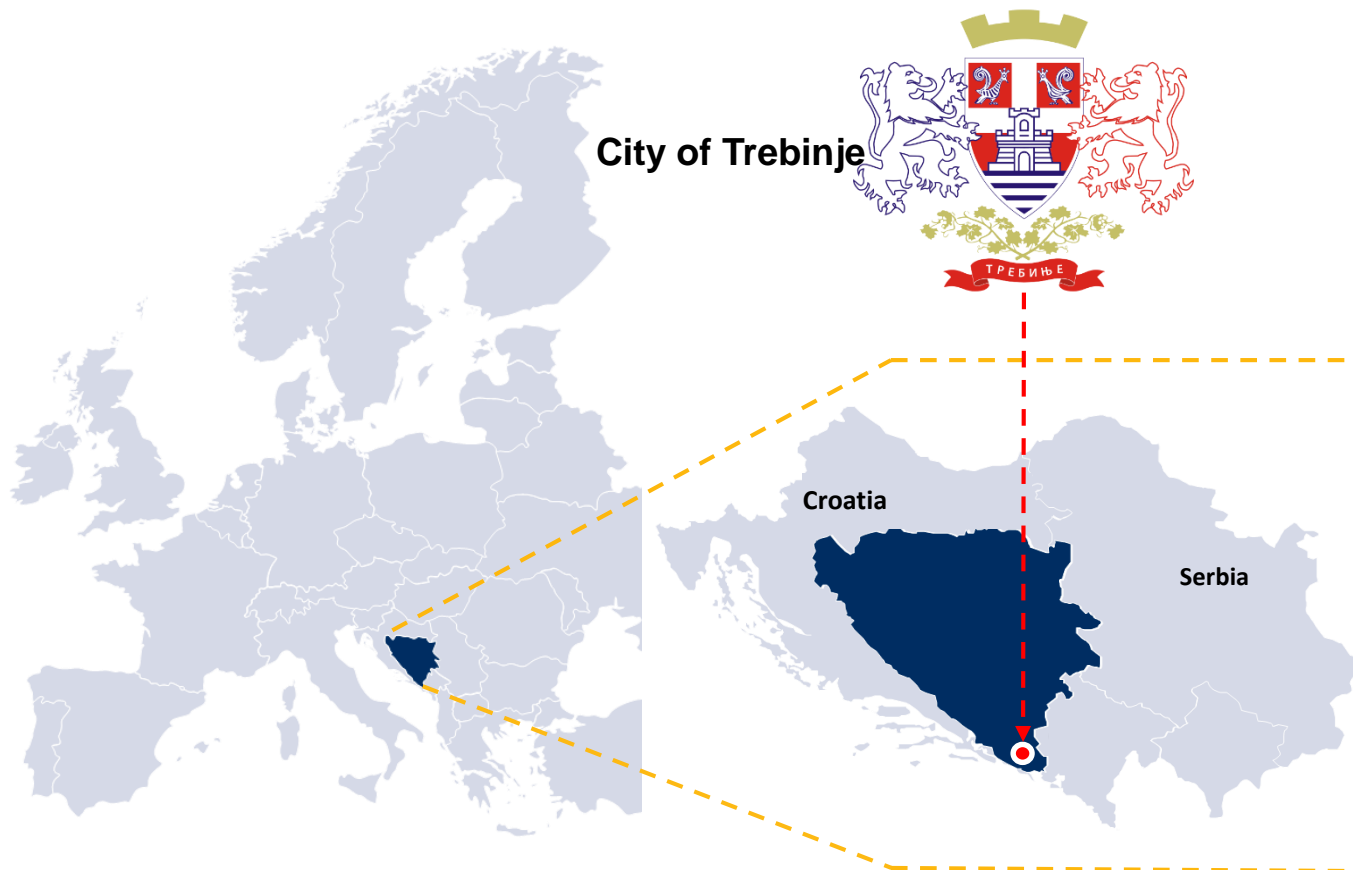


2 Situational and market analysis

2.1. GENERAL AND ECONOMIC SITUATION

Trebinje has an extremely favourable geo-strategic position, which represents one of its key competitive advantages

Geo-strategic position of Trebinje



The City of Trebinje is a part of the Republic of Srpska and along with the Federation of Bosnia and Herzegovina represents the one of entities of Bosnia and Herzegovina.

It is located on the border of three countries- Bosnia and Herzegovina, Croatia and Montenegro, and near recognized tourist destinations - Mostar, Dubrovnik and Herceg Novi, and the Bay of Kotor. Also, an important road connecting Belgrade with the Croatian and Montenegrin coast passes through the area of Trebinje.

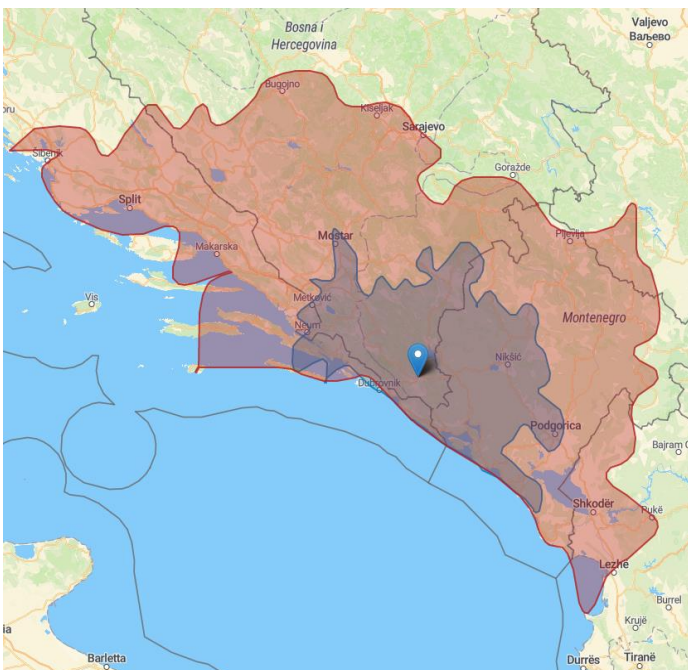
Based on the above, it is possible to conclude that Trebinje has an extremely favourable geo-strategic position, which is one of the key competitive advantages of the area and, along with attractive tourist potentials, one of the main foundations of tourism development in the City and its surroundings.

The City of Trebinje has an area of a total of 904 km² and with a total of 28.334 inhabitants, recorded in 2018, an average population density of 31 inhabitants per km², which is significantly less compared to the average population density of the Republic of Srpska (46 inhabitants / km²).

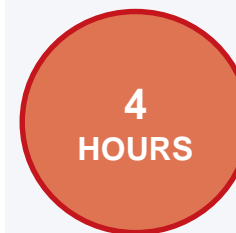
Given the number of inhabitants in the surrounding and number of external visitors, Trebinje has a potential to attract more guests

Selected cities and destinations of the region

City	Population	City	Arrivals in 2018
Sarajevo	275.524	Sarajevo	573.227
Mostar	60.195	Mostar	1.050.000
Split	170.419	Split	859.224
Dubrovnik	44.376	Dubrovnik-Neretva County	2.063.973
Podgorica	150.977	Podgorica	169.890
Herceg Novi	11.059	Herceg Novi	313.985
Budva	150.977	Budva	891.226
Nikšić	56.970	Makarska	244.248
Belgrade	1.659.440	Kotor	139.573
Banja Luka	138.963		
Total	2.718.900	Total	6.305.346



**2
HOURS**



**4
HOURS**



**Dubrovnik
2.896.227
passengers**

**Podgorica &
TIVAT
2.454.524
passengers**

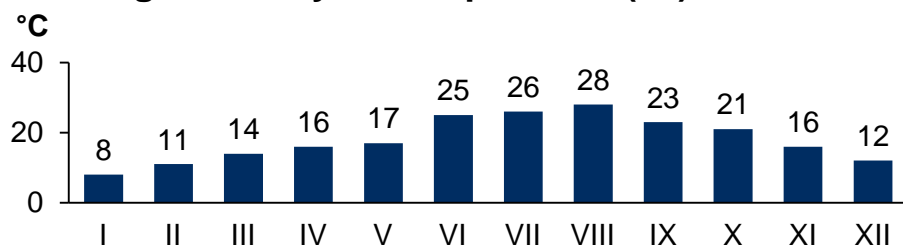
**Sarajevo
1.143.680
passengers**

**Total
6.494.431
passengers**

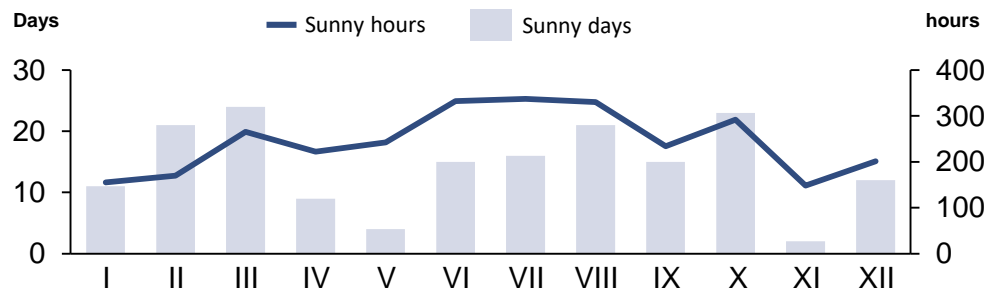
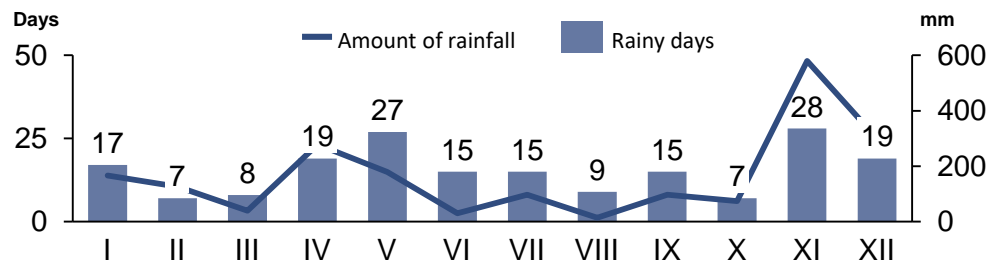
The total population of the 10 cities included in the analysis is 2,7 million. Out of 10 cities, 8 are within a 4-hour drive, while Belgrade is included in the analysis based on information from the field that emphasize the importance of this market for the overall tourist traffic of Trebinje. On the other hand, the analysis of the number of arrivals includes destinations that are within a 4-hour drive. In this context, the Dubrovnik-Neretva County and Mostar stand out, which independently record more than 3 million arrivals a year. The total number of arrivals in these cities exceeds 6,3 million arrivals. The total number of passengers recorded at the nearby airports in Dubrovnik, Montenegro and Sarajevo is 6.494.431, whereof Dubrovnik accounts for almost 45% of all passenger movements. Given the number of arrivals, the conclusion is that Trebinje still does not use the potential of the market demand located in the region.

Trebinje has favourable climate with a large number of sunny days suitable for tourist activities throughout the year

Average monthly air temperature (°C) in 2019



Average amount of rainfall and rainy days in 2019



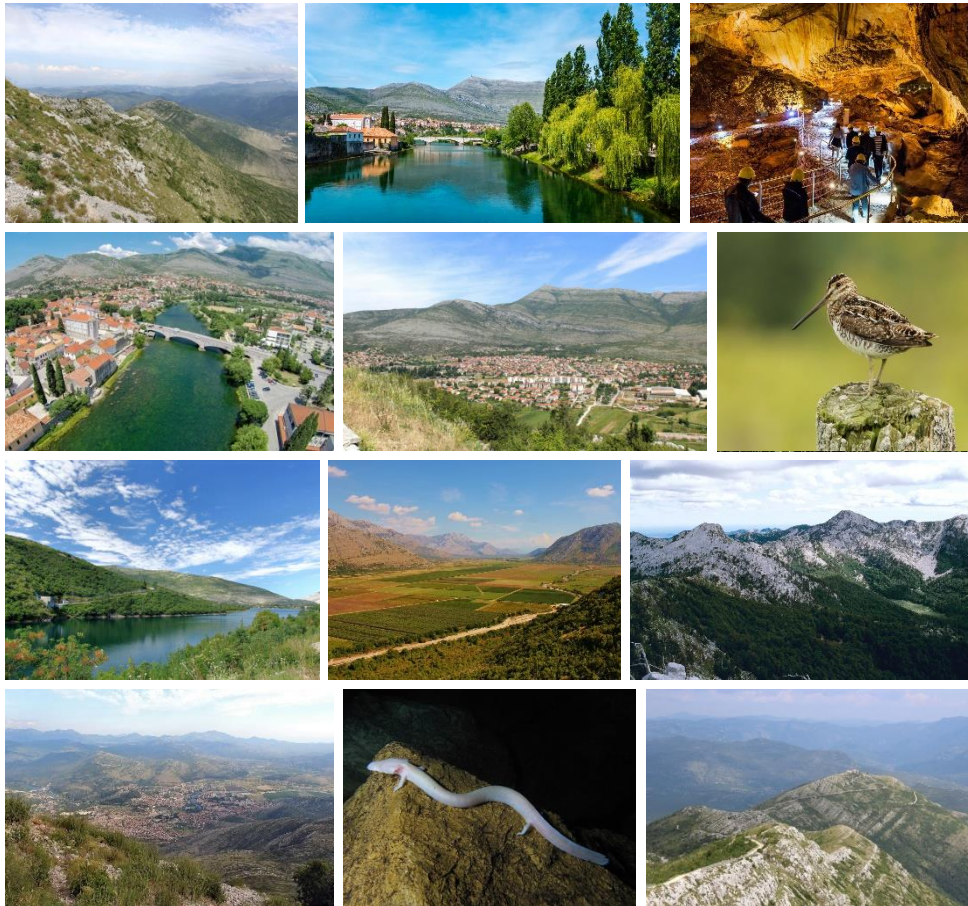
The climate in Trebinje is Mediterranean with long, warm summers and relatively short, mild winters, which makes the City one of the warmest in Bosnia and Herzegovina. The average annual air temperature is 18,1 °C, with the highest average temperature recorded in August (28°C). The month with the lowest air temperature is January, in which an average temperature of 8 °C was recorded in 2019. From the review of the average monthly air temperature, it is possible to conclude that autumn is warmer than spring, which indicates excellent conditions for extending the tourist season.

The average rainfall in 2019 was 165,2 mm with the highest number of rainfall recorded in November (580 mm), and the lowest in August (14mm). The average number of rainy days per month was 15,5, with the highest number of rainy days recorded in November (28), and the lowest in October and February (7). Although the number of rainy days is relatively high in the summer months (average is 13,5 days), it should be stressed that these are mainly showers, as average rainfalls in that period are very low (average is 60 mm).

The total number of sunny hours in 2019 was 3.172, while the total number of sunny days was 187. The highest number of sunny hours was recorded in the summer months, in the period from June to August, while the lowest number was recorded in November. The highest number of sunny days was recorded in March (24), and the lowest in November. A large number of sunny days in the period from January to March indicates the possibilities of tourist activities development in that part of the year too.

The relief characteristics have a strong attractive resource basis for further tourist destination development

The relief characteristics of Trebinje



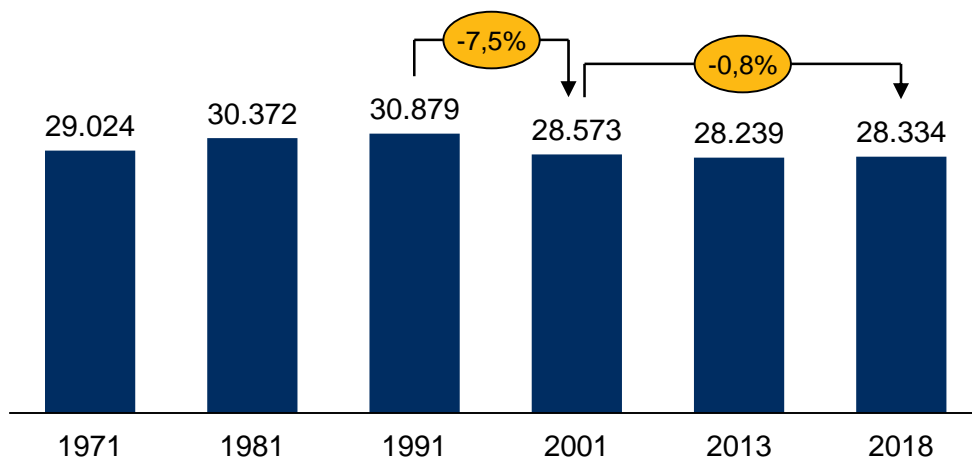
The City of Trebinje is situated at the foot of Leotar mountain and surrounded by mountains from one side and karst fields on the other. The specificity of some hills in the vicinity of Trebinje are Austro-Hungarian fortresses located on them, which can contribute to the interest of tourists in case of their activation and better tourist valorization. Also, their resource base is suitable for the development of various forms of active tourism.

Through the City centre flows the Trebišnjica River, which represents an attractive tourist resource and potential for tourist valorization. In addition, the rich river stock, which includes fish such as trout, carp, scrapers, bream, catfish, also attracts many anglers. On the very river several dams were built, by which Bileća and Trebinje storage lakes were created, which also have a certain attraction base.

Within this destination are the two largest fields, Trebinjsko and Popovo polje (field), which are mainly used for growing crops. In the northwestern part of the field there is the Vjetrenica cave, which is the largest and most famous cave in Bosnia and Herzegovina, and also a protected natural monument. The special feature of the cave is additionally emphasized by a rare species of human fish, for the commercialization of which there is a special observatory, unique in the world. Other lowland areas are suitable for the development of hunting tourism, as this destination has a rich animal fund. Various animals such as roe deer, rabbits, wild boars, partridges, foxes, but also Eurasian woodcocks are present on the 92.000-hectare hunting ground.

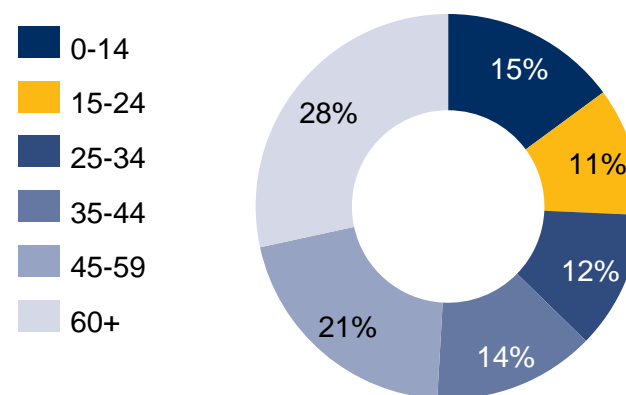
The population has been stable since 2001, almost half of the population is over 45

Number of population from 1971 to 2018



The total population of Trebinje in 2018 was 28.334 and it has been relatively stable since 2001, with the decrease of 0,8%. In comparison with 1971 when that number was 29.024, the number of inhabitants in Trebinje in 2018 decreased by 2,4%. The highest number of inhabitants was recorded in 1991 when population was 30.879. The largest decrease in the number of inhabitants, out of all observed ten-year periods, was recorded in 2001 (7,5%). The total number of inhabitants in that year was 28.573. Given the stable demographic structure in the last decade and a noticeable slight increase in the last 5 years, Trebinje shows a positive demographic trend and a good basis for further tourism development.

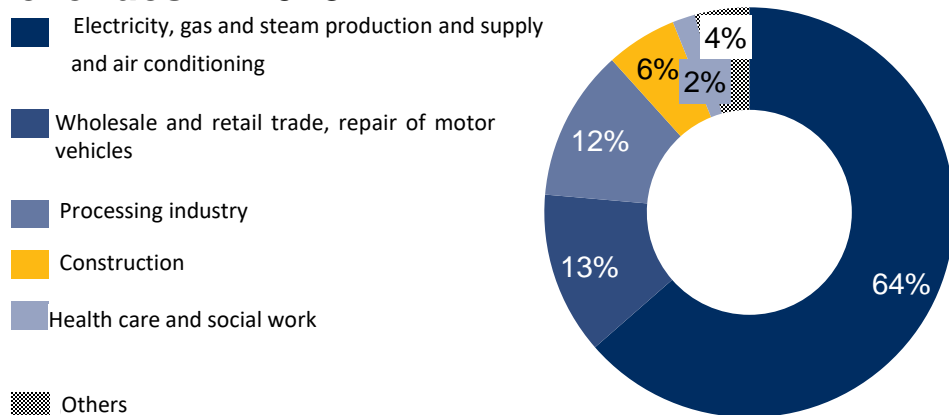
Population age structure in 2013



According to the latest available data on the population age structure from 2013, the share of population over 60 predominates in the age structure with 28%. When the two oldest groups are added according to this methodology (older than 45 years), the analysis shows that almost half of the population belongs to mature and older age. The youngest age group, up to 14 years, occupies a larger share of the older teenagers and students age group (15 to 24 years), which indicates that young residents of Trebinje choose other cities for higher education (most often Belgrade and Novi Sad, according to the field information). In accordance with the above, it can be concluded that the age structure can in the long run negatively affect tourism development as well as other activities in the area of Trebinje.

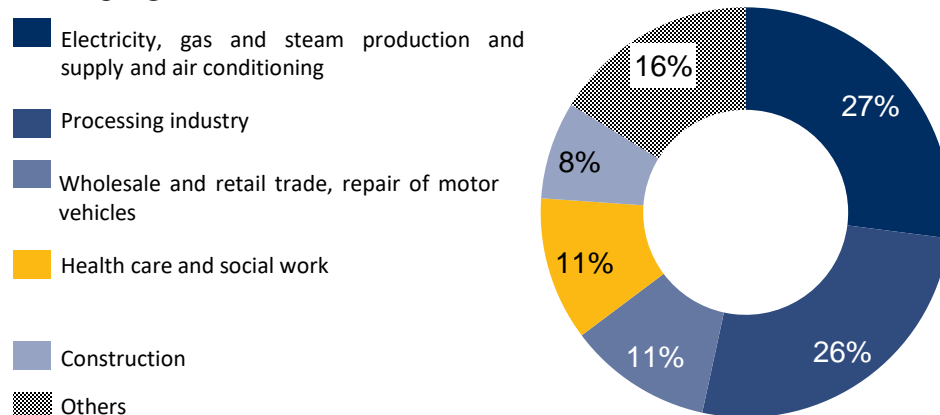
The energy sector, trade and processing industry generate the highest revenues and employ the largest number of inhabitants

Structure of economic activities according to revenues in 2018



The largest part of revenues from economic activities in Trebinje accounts for the production and supply of electricity, gas, steam and air conditioning, a total of 64% or approximately BAM 579 million. With a share of 13% or BAM 116,8 million, wholesale and retail trade, repair of motor vehicles takes second place according to the structure of total revenues, followed by the processing industry with a share of 12% or BAM 108,8 million. Among the 5 most important economic activities are construction, health care and social work with shares of 6% and 2%, respectively. The activities of providing accommodation, food service, hotel industry and catering occupy only 1% of the total revenue of Trebinje, which indicates the currently low development of that activity

Structure of employees according to activities in 2018



In contrast to the analysis of revenues, the analysis of the structure of employees by activities shows a higher level of uniformity with the shares of the first 5 activities from 8% to 27%. The largest number of employees was recorded in the production and supply of electricity, gas, steam and air conditioning, a total of 1.383 people. In the second place is the processing industry, which in 2018 employed 1.349 people in Trebinje. Retail and wholesale trade, repair of motor vehicles and health care and social work activities recorded almost the same number of employees (581 and 580) and a share of 11%. The activities of accommodation, food service, hotel industry and catering accounts for a relatively small share- 3,6% or 182 employees*.

More than a half of total revenues are realized by the Mixed Holding “Power Utility of the Republic of Srpska”, while the accommodation segment of hotel “Leotar” records 21,3% of revenues

Leading companies by revenues in 2018 (BAM)

Company name	Number of employees	Annual revenue	Share*
Mixed Holding “Power Utility of the Republic of Srpska” parent joint-stock company Trebinje	215	477.861.513	52.4%
“Swislion“ Ltd Trebinje	425	72.065.956	7.9%
MH “Power Utility of the Republic of Srpska” parent joint-stock company, Subsidiary "HPP on the Trebišnjica River" joint- stock company Trebinje	745	69.875.729	7.7%
RDT SWISSLION Ltd Trebinje	122	45.432.672	5.0%
MH “Power Utility of the Republic of Srpska” parent joint-stock company - “Elektro Hercegovina” joint-stock company Trebinje	379	31.058.638	3.4%

Out of the top 5 companies in Trebinje, 3 belong to the production and supply of electricity, gas, steam and air conditioning (Mixed Holding “Power Utility of the Republic of Srpska”, parent joint-stock company Trebinje and both mixed holdings) with a total revenue share of 63,5%. The remaining two companies are part of one company, but their activities are different, so “Swisslion”, Ltd Trebinje was registered to engage in the processing industry and records almost 8% of total revenues, while RDT “Swislion” Ltd Trebinje is engaged in the activity of wholesale and retail trade, vehicle repair and participates with 5% of revenues in the total distribution. Out of the top 20 companies, only one records revenues from tourism activities with a share of a negligible 0,5%.

Leading companies by revenues in the field of accommodation in 2018 (BAM)

Company name	Number of employees	Annual revenue	Share*
Leotar ltd	25	1.073.158	21,3%
Spa and hotel “Studenac” ltd	22	867.821	17,2%
“German invest” ltd	19	640.552	12,7%
"BOKU Invest" ltd	28	563.508	11,2%
“Mediterrana” ltd	8	542.552	10,7%

The total revenue from the activities of accommodation, food service, hotel industry and catering in 2018 in Trebinje amounted to BAM 5.050.109, which represents 0,6% of the total revenues from all economic activities in Trebinje. Out of the 17 companies submitted by the client, the company that recorded the highest revenue in 2018 is “Leotar” ltd with BAM 1,1 million or 21,3% share in total revenues.

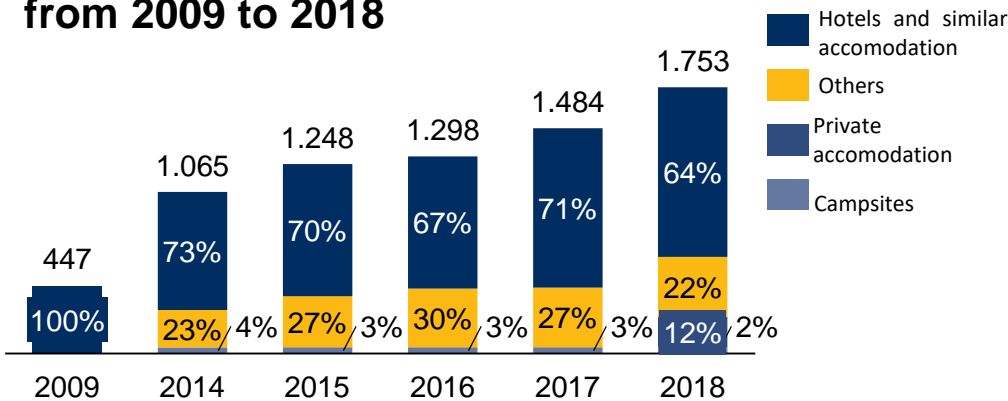
The first 5 companies in the field of accommodation produce 73% of the revenue in that area. The total number of employees in the field of accommodation is 136, and these 17 companies employ an average of 8 workers. “BOKU Invest” ltd has the largest number of employees (28).

2.2. TOURIST MARKET

Since a significant part of private accommodation is not a part of official statistics, hotel accommodation dominates the accommodation structure

The structure of accommodation capacities

from 2009 to 2018



The total accommodation capacity in Trebinje, according to the official data of the Tourist Organization (hereinafter TO), amounted to 1.753 bed places in 2018. Compared to 2009, that capacity increased almost four times, i.e. an annual growth rate of 32%. This leads to a conclusion that in the last ten years tourism in Trebinje has been accepted as an attractive activity for the local population and other investors in accommodation capacities.

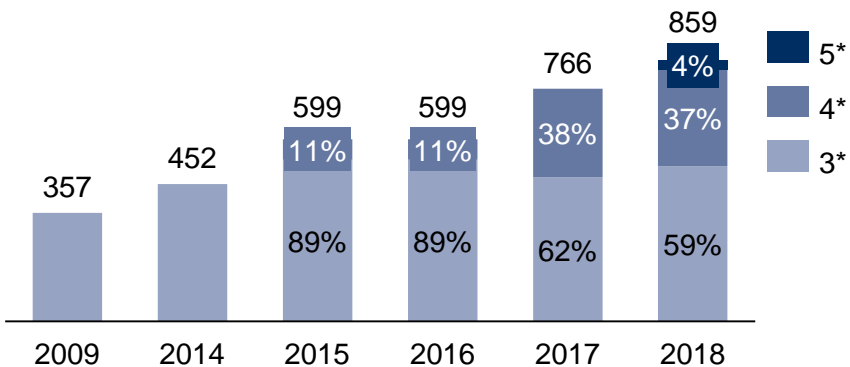
Before further conclusions on accommodation capacities, it should be noted that, according to the findings from the field, the official data deviate significantly from the real situation and that the capacity of private accommodation is significantly higher.

In this context, according to the official data, it is possible to conclude that hotel accommodation dominates the accommodation offer with almost two thirds of the total registered accommodation capacity, while the next in terms of share is the category of accommodation "others" with capacity of 22%. Private accommodation only in 2018, after the change of the monitoring model by TO Trebinje, increased to a total of 202 bed places, which is 12% of the total accommodation capacity according to the official statistics

In 2009, all hotel capacities were categorized with 3 stars. Over a ten-year period, diversification and improvement of capacity quality was visible, given the growing share of hotel capacity categorized with 4 and 5 stars.

Regardless of the shortcomings in the official statistics, it is possible to conclude that accommodation capacities in Trebinje record a strong growth rate, however, most of the accommodation is still of medium quality.

Categorization of hotel capacities from 2009 to 2018

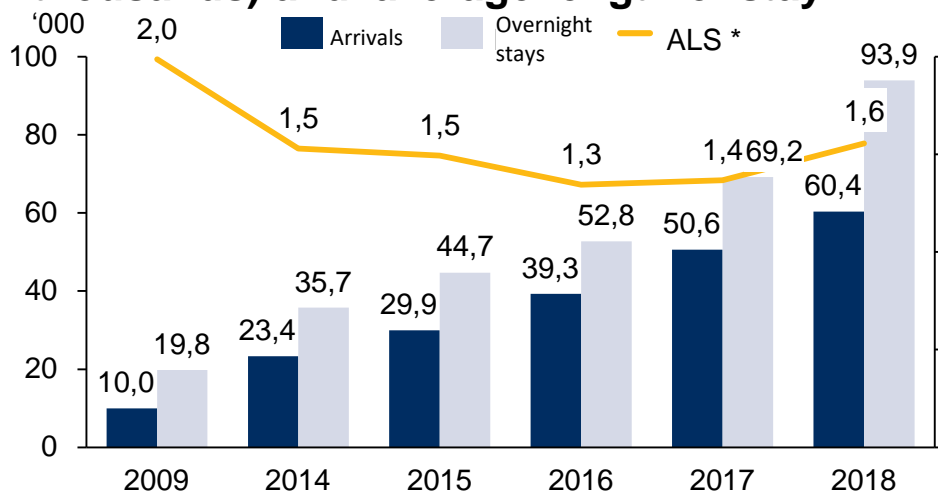


Source: TO Trebinje, Horwath HTL, 2020

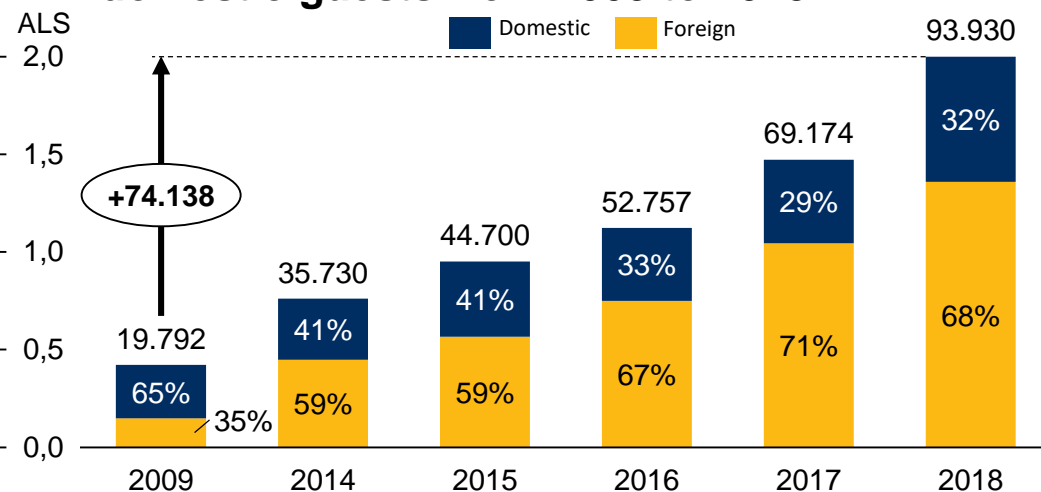
* Note: Accommodation category "Others" means accommodation in hostels, villas and hostels

Tourist demand grew faster than offer, under the strong influence of foreign guests, along with the shortening of the average length of stay

Number of arrivals, overnight stays (in thousands) and average length of stay



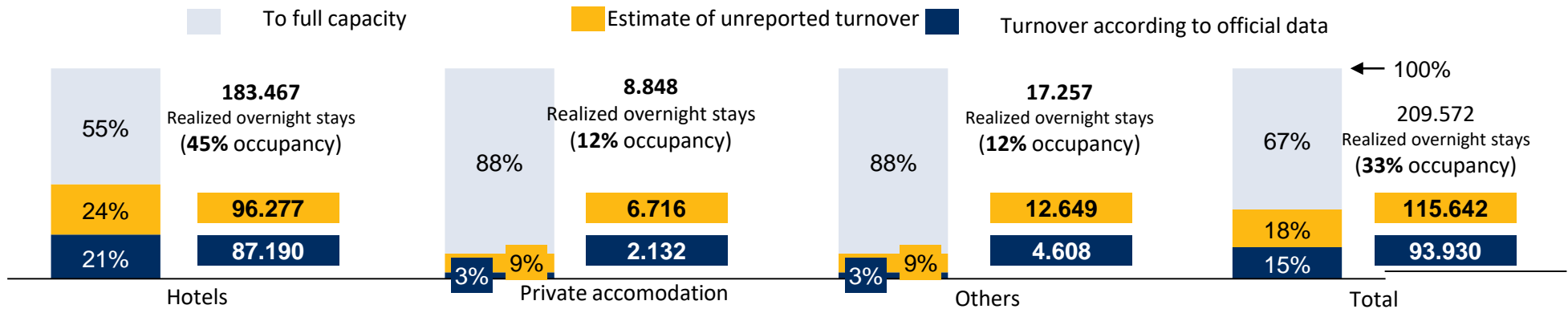
The ratio of overnight stays of foreign and domestic guests from 2009 to 2018



According to the available data and official statistics, a total of 60.356 arrivals and 93.930 overnight stays were recorded in Trebinje in 2018. Compared to 2009, arrivals increased 6 times, and overnight stays 4,5 times. Demand grew faster than offer as the number of overnight stays recorded an annual growth rate of 37%. It should be noted that the number of arrivals is equal to the total number of arrivals in hotel accommodation capacities, while the number of overnight stays is the result of sum with overnight stays in private accommodation and other capacities (more detailed elaboration can be found below). The average length of stay was reduced from the initial 2 nights to the lowest level of 1,3 nights in 2016. In 2018, the average length of stay was 1,6 nights which indicates to a lack of facilities that would keep guests for a longer period of time, and to the conclusion that Trebinje is mainly a transit destination for organized groups. However, in the period from 2009 to 2018, a significant change in the guests structure was visible. In 2009, 65% of total overnight stays were realized by domestic guests, while at the end of the analysed period in 2018, the share of foreign guests increased to 68%. This leads to the conclusion that growth in the numbers of overnight stays is predominately caused by the growth of foreign overnights stays, which is confirmed by the calculation in absolute amounts. Namely, out of the total growth of overnight stays which amounted to 74.138, foreign overnight stays produced 77%, and the remaining 23% produced domestic guests.

With a conservative approach and based on reported capacities, the estimate shows that the real number of overnight stays is more than twice higher

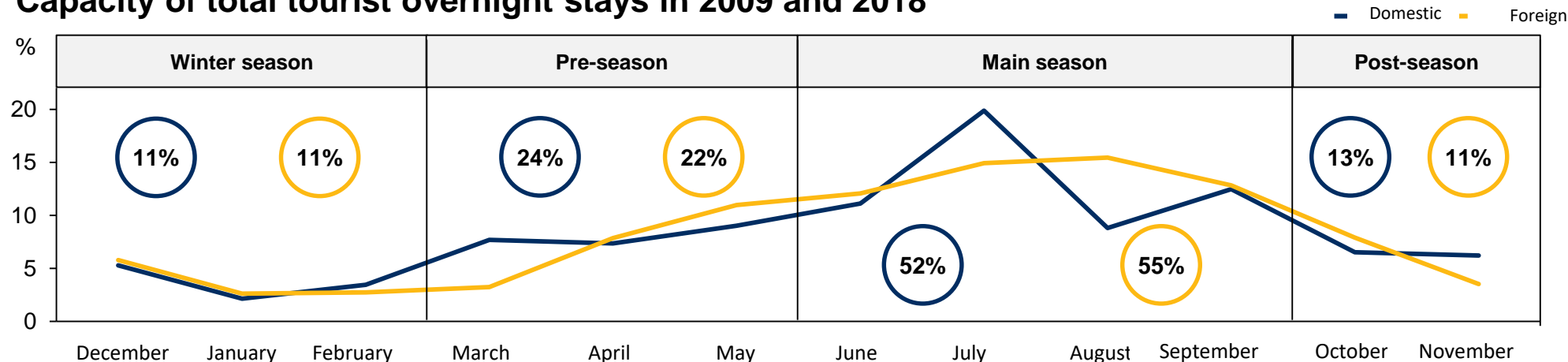
Occupancy of accommodation capacities and estimate of the real turnover in 2018



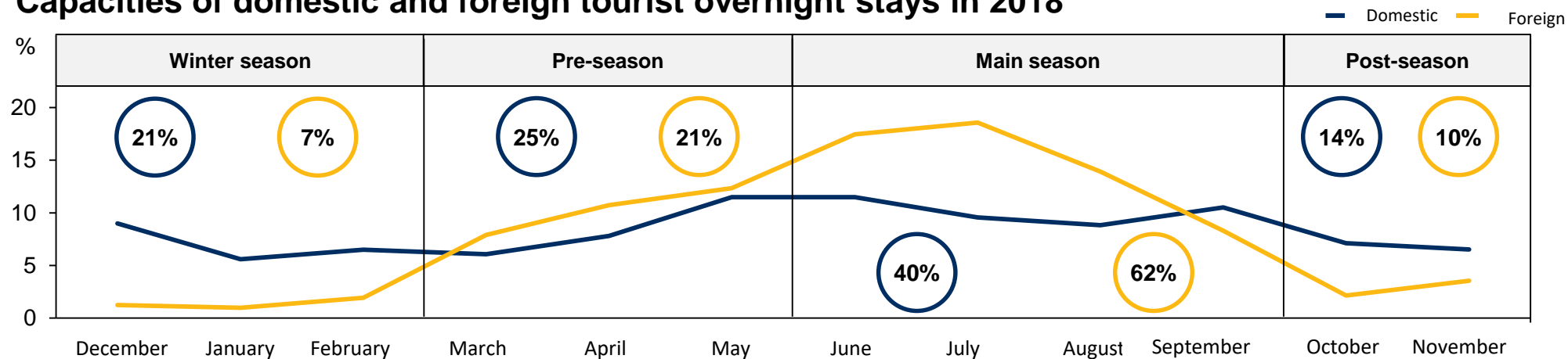
Considering the information from the field that a significant part of tourist traffic is unreported, an estimate of the real number of overnight stays was made. Information on the average capacities occupancy from the facilities owners and the regional average accommodation facilities occupancy in destinations of lower or the same level of development were taken as a basis for the estimate. It should be mentioned that this is a conservative approach and that the potential turnover is significantly higher. The reason for this is lower seasonal capacity utilization in the regional destinations than in Trebinje (the tourist season in Trebinje is considered to be the period from April to October) and the fact that the capacity of private accommodation was not increased for analysis purposes, i.e. the official data was taken into account. The conducted analysis shows that no more than 50% of tourist overnight stays were reported in Trebinje, i.e. that it is necessary to add another 116 thousand to the reported 94 thousand overnight stays in order to reach the total and real number of realized overnight stays of approximately 210 thousand. According to the largest share in the total accommodation structure, the most unregistered nights are in hotel accommodation – 96.277. The stated data indicate a significant lost revenue from the residence tax, and considering that the same is charged BAM 3 per night in a hotel accommodation, the lost revenue from the tax on an annual level amounts to around BAM 288.831. On the other hand, it is necessary to point out that in 2019 and 2020 a significant increase in registered capacities of private accommodation is expected as a consequence of encouraging participants by TO and the City of Trebinje, which should lead to an increase in revenue from the residence tax flat rate, which in private accommodation is charged per permanent bed places. However, these activities will not necessarily lead to an increase in reported traffic in private accommodation and are largely due to the lack of an effective monitoring and control system at the level of the Republic of Srpska and the Federation of B&H.

The seasonality is better in relation to coastal destinations, but with the increase of tourist traffic of foreign guests...

Capacity of total tourist overnight stays in 2009 and 2018



Capacities of domestic and foreign tourist overnight stays in 2018



... a further trend of increasing traffic during the summer months and the growth of the negative impact of seasonal tourist traffic is to be expected

For the purpose of seasonal tourist traffic analysis, the year is divided into four periods: 1) winter season, which includes the months of January, February and December, 2) pre-season, i.e. March, April and May, 3) main season which covers four months - June, July, August and September and 4) post-season, which lasts the shortest, and covers October and November. It should be noted that the approach has been adjusted with regard to information from the field and the objective duration of the maximum tourist load is shown in the previous graphs.

In order to make a comparison with the seasonal tourist traffic of coastal destinations, the average between the top ten coastal destinations in Croatia (Dubrovnik, Split, Rovinj, Zadar, Poreč, Umag, Opatija, Pula, Medulin) and the official statistical category “coastal destinations” in Montenegro was calculated. The results of the analysis indicate a more evenly distributed tourist traffic in Trebinje, given that 76% of tourist traffic in coastal destinations occurs during the main season (compared to 55% in Trebinje) and consequently forms part of tourist traffic in other periods of the year.

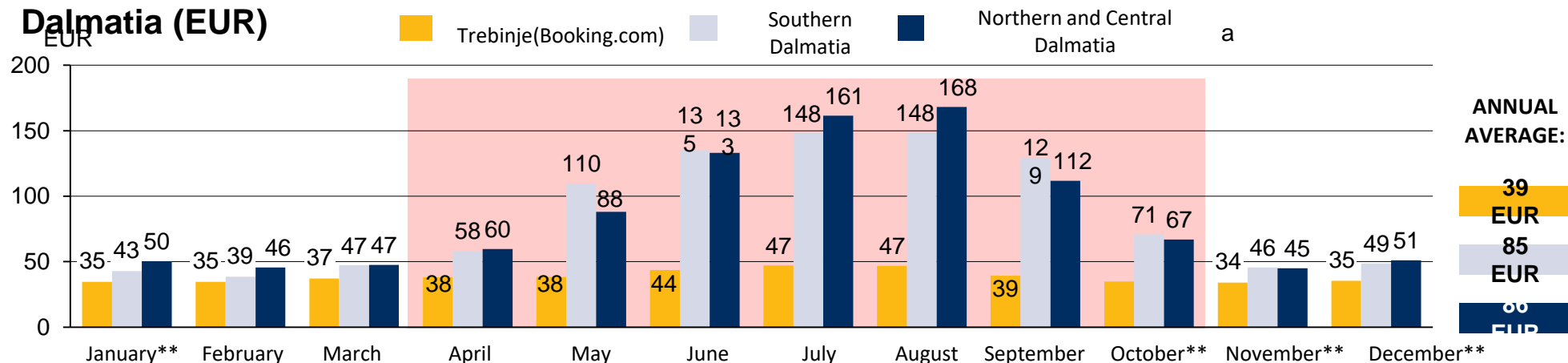
As can be seen from previous analyses, tourist traffic in Trebinje grew more than four times in the observed ten-year period, and it is possible to conclude that from 2009 to 2018, a small but existing increase in overnight stays during the summer months is visible. In 2009, 52,3% of tourist traffic was realized in the main season, while in 2018 the main season contributed to the total tourist traffic with 55,3%

The share of the main season grew at the expense of the pre-season and post-season, during which 36,8% of turnover was realized in 2009, and 33,5% in 2018, i.e. 3,3% less. The winter season rose slightly by 0,3 %, from a 10,9% share in 2008 to an 11,2% share in 2018. By presenting the seasonal tourist traffic of domestic and foreign guests, the goal was to show the growth of overnight stays which was predominantly caused by overnight stays of foreign guests. The graph shows that the curve of tourist overnight stays of domestic guests is slightly laid and represents the desired distribution of tourist traffic. Namely, by comparing the realized average turnover in each of the observed seasons on a monthly basis, minor variations are visible. Thus, in the posts-season (the period with the lowest total share of traffic) an average of 7% of the total number of domestic overnight stays was realized, while during the main season (the period with the highest absolute and relative share of domestic overnight stays) an average of 10% of the total overnight stays.

On the other hand, by comparing the same indicators for overnight stays of foreign guests, larger variations in the average turnover traffic on a monthly basis by seasons are visible. Foreign guests in the winter season averaged 2% of total overnight stays, while during the main season the average share of months is 16%. Considering that the growth of tourist traffic in Trebinje is a result of the demand of foreign guests (more than 75% of new overnight stays in a ten-year period), it is to be expected that seasonal tourist traffic will continue to grow in the summer compared to the rest of the year.

The average price of a 4-star hotel room lags significantly behind the average of Northern, Central and Southern Dalmatia from March to October

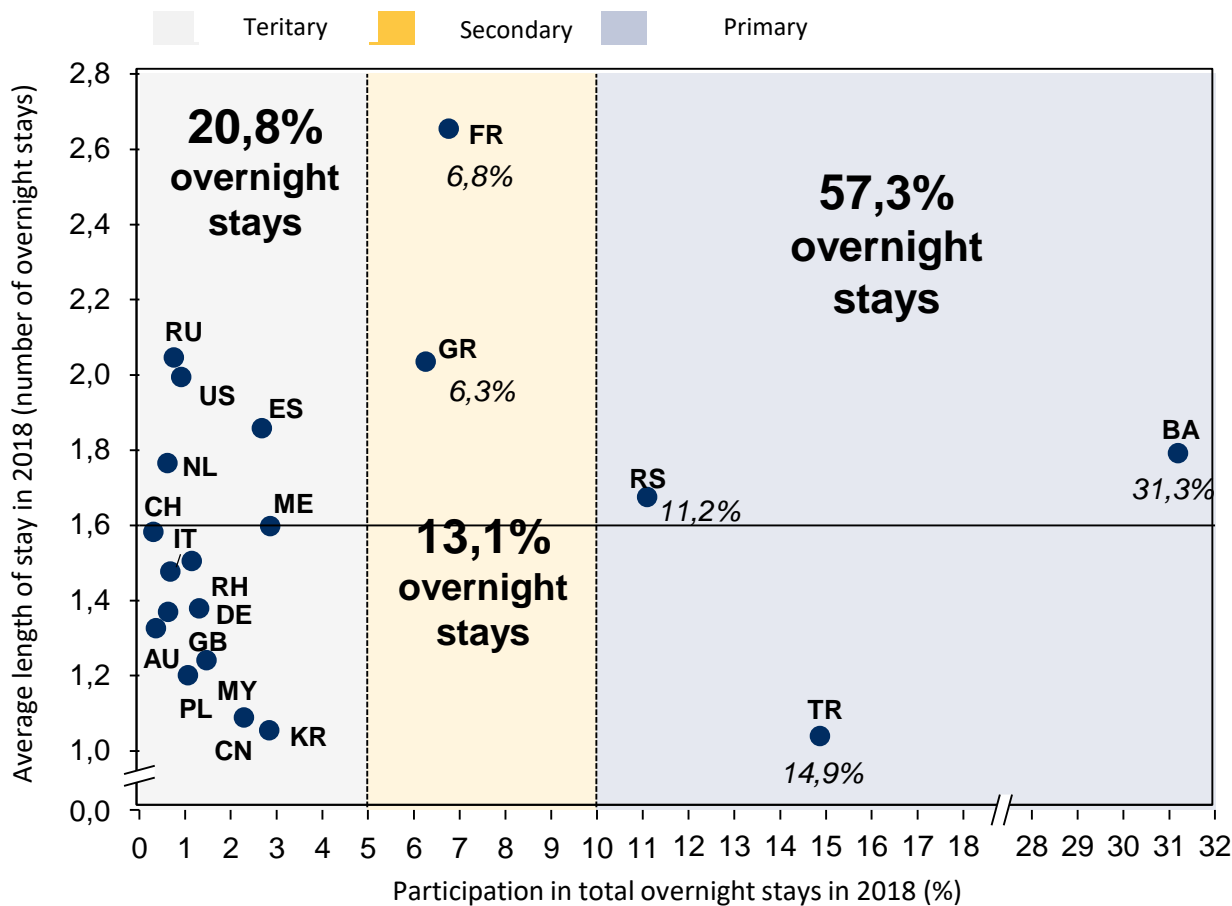
The comparison of a room average price in hotel accommodation with 4 * Trebinje and Dalmatia (EUR)



For the purpose of defining the average room price, the Booking.com platform was used. All hotels categorized with 4 *, whose capacities are sold through the platform, were on average taken into consideration. The room price was estimated by deducting commission and taxes from the average accommodation prices on the platform. Data on the average room price of Dalmatian hotels are taken from the regular Horwath HTL report - HHS Horwath Hotel Survey from 2018 and 2019. The average room price of Trebinje hotels is, on average, more than twice lower than Dalmatian hotels and amounts to € 39 compared to € 85 and € 86 in Southern, Northern and Central Dalmatia. However, from the comparison on a monthly basis, it is necessary to conclude that a significant difference occurs in the period from March to October, i.e. in the period when hotels in Dalmatia begin to raise prices according to seasonal demand growth. The price of accommodation in Trebinje accommodation capacities is significantly more stable throughout the year, which indicates the lack of a strategic approach to creating price lists. It also should be noted that some facilities no longer sell their capacities during the main season (high occupancy), and according to the findings from the field, most accommodation capacities are occupied by touring groups. Based on all the above, it is possible to conclude that there is a significant space for higher prices in Trebinje and, consequently, revenue from accommodation. However, it is necessary to pay attention to maintaining the service quality and facilities diversity.

Guests from B&H and Serbia make up 42,5% of the total number of overnight stays, and guests from France, Greece and Russia stay in this destination the longest

Division of the top 20 emitting markets according to the average length of stay and share in overnight stays in 2018



The first 20 emitting markets of Trebinje in 2018 are divided into primary, secondary and tertiary according to the share in total overnight stays and the length of stay at this destination. The lower primary markets limit is 10% of the total share, while a longer stay is considered to be a stay that lasts longer than the destination average of 1,6 nights. The key market of Trebinje is Bosnia and Herzegovina, and together with guests from Serbia it accounts for 42,5% of total overnight stays. Turkey is the second market in terms of share in total overnight stays with an average stay of exactly 1 night, which clearly indicates to the fact that guests from Turkey are just a part of organized tours. In general, Trebinje does not manage to retain guests longer, which is supported by the fact that the French stay the longest in this destination with an average of 2,6 nights, followed by Russians and Greeks. France and Greece are classified as secondary markets due to their longer stay, with a slightly higher share in total overnight stays. The rest of the market is classified as tertiary markets as the share of any market does not exceed 3% of the total overnight stays, and in the following period it remains to be seen to what extent the demand market will be expanded.

Source: TO Trebinje, Horwath

* AU=Australia, BA=Bosnia and Herzegovina, CH=Switzerland, CN=China, DE=Germany, ES=Spain, GB= Great Britain, GR=Greece, FR= France, IT=Italy, KR=Korea, NL=Holland, ME=Montenegro, MY=Malaysia, PL=Poland, RH=Croatia, RS=Serbia, RU=Russia, TR=Turkey, US=United States of America

According to the produced traffic, tourist tours are crucial, while business tourism, culture and rural tourism are additional tourist products

Key tourist products

Tourist tours: 65% of total demand

A tourist tour is conceptually defined as a tourist product that implies individual or group organized movement in a certain space with the aim of discovering the specific characteristics of the destination. Tourist tours in Trebinje are present due to the proximity of recognized tourist destinations on the Croatian and Montenegrin coasts. Most groups stay only one night and do not fully experience the destination. Other groups during their short stay in this destination exercise the activities based on religious and cultural resources (monasteries, mosques, Kastel, etc.), although, the economic effect of these groups is extremely weak due to low consumption.

Business tourism: 15% of total demand

The demand of business guests currently exists due to the headquarters of various companies, important at the level of the Republic of Srpska and at the international level. According to information from the field, the arrival of business guests is constant and, although they do not generate a key amount of traffic, they provide a reason for certain facilities to continue operating during the off-season. On the other hand, speaking of developmental context, Trebinje has a strong potential for development based on the proximity of Dubrovnik (congress tourism destination), as well as other nearby cities where various companies are located. Rural tourism and outdoor activities also represent a strong developmental foundation. They will be developed in the next period.

Cultural tourism: 15% of total demand

Religion and all related attractions imply, on the one hand, a motive of arrival of the Orthodox faith guests, and in that context, religious tourism is a separate tourist product of Trebinje. However, due to the cohabitation of several religions in a limited space and their impact on the attractive structure of the City (Kastel, settlement Krš, cathedral in the City centre, mosques, etc.) and multicultural community, it is considered that religion and culture are a common product of the destination which for the needs of this document is called cultural. Cultural tourism in Trebinje has a strong potential for development based on unused resources.

Rural tourism: 5% of total demand

Rural tourism is mostly reflected in the developed production of wine and other agricultural products. Some of the key attractions are based on the experiences of eno-gastronomic offer (e.g. Tvrdoš, Herzeg house, wineries Vukoje, Anđelić, etc.) and the rural area (rural households Kisin, Šišić, etc.). Although some of these attractions have been developed in the direction of sophisticated products in the field of eno-gastronomic offer (e.g. Vukoje winery), the rest of the destination is based on the rural surroundings of Trebinje. However, in total demand, rural tourism is still not the only motive for high number of guests throughout the year.

The tourist agencies offer is very limited, what results in insufficient creation and provision of facilities and experiences within the destination

Overview of the receptive tourist agencies

According to the information received from the clients, there are 5 receptive tourist agencies operating in the area of Trebinje. According to insights through the agencies websites, it is evident that a certain part of them do not offer local experiences. Only one agency (*Herc Travel*) is more focused on the commercialization of the local offer. Other agencies, according to the offer presented on the websites, are mainly oriented towards travel arrangements outside of Trebinje. The activities available in Trebinje are included to a lesser extent. On the travel agencies market in the entire Republic of Srpska, including Trebinje, there is a lot of space for progress in business competitiveness. This is supported by the fact that formally five agencies (the leading tourist destination at the national level) operate in the area of Trebinje, while the facilities of the specialized tourist agency (DMC - Destination Marketing Company) are developed by one to two agencies. Out of the five listed agencies in 2018, two did not generate revenue and employed one person each, which calls into question their existence in the tourism market. Also, it should be noted that agencies need to improve the web presentation of their offer (SEO *, foreign languages, quality of multimedia, texts, etc.).

Company name	Activity key focus	Number of employees	Revenue realized in 2018 (BAM)
<i>Friend Travel</i>	Provision of receptive tourist services, organization of excursions and sightseeing tours, European and world travel	5	487.232,00
<i>Lux Travel</i>	Sale of travel arrangements in the country and abroad, organization of travel and international transfers	5	314.579,00
<i>Ubla Tours</i>	Transport of passengers in international road traffic, sale of bus and air tickets	13	45.925,00
<i>Herc Travel</i>	Transportation of passengers in international road traffic, sale of bus and air tickets	1	/
<i>Europartner Travel</i>	Provision of receptive tourist services, accommodation and transfer services, organization of excursions and sightseeing tours	1	/

Source: TO Trebinje, Horwath HTL, 2020

*SEO – "search engine optimization" – website optimization

According to the *Tripadvisor* attractions order, the key motives of visits can be concluded

The first 12 attractions, number of reviews and type of attraction according to *Tripadvisor*

<p>1</p> 	<p>Hercegovacka Gračanica 213 reviews Sights: churches and other religious buildings</p>	<p>5</p> 	<p>Wine cellar <i>Vukoje</i> 25 reviews Food and beverage, wineries and vineyards</p>	<p>9</p> 	<p>City of Sun - Aqua and Dino Park 35 reviews Nature and parks, water and amusement parks</p>
<p>2</p> 	<p>Tvrdoš Monastery 161 reviews Sights: churches and other religious buildings</p>	<p>6</p> 	<p>Cathedral of the Holy Transfiguration of the Lord 31 reviews Sights: churches and other religious buildings</p>	<p>10</p> 	<p>Wine cellars <i>Anđelić</i> 10 reviews Food and beverage, Wineries and vineyards</p>
<p>3</p> 	<p>Old town Trebinje 118 reviews Sights: architecture and historically significant places</p>	<p>7</p> 	<p>Trebisnjica River 16 reviews Nature and parks, water surfaces</p>	<p>11</p> 	<p>Freedom square 10 reviews Sights: walking spaces, historical significance</p>
<p>4</p> 	<p>Arslanagic bridge 136 reviews Sights: bridges</p>	<p>8</p> 	<p>Museum of Herzegovina 30 reviews museums, shopping</p>	<p>12</p> 	<p>Wine cellars of the Tvrdoš monastery 16 reviews Food and beverage, Wineries and vineyards</p>

According to Horwath HTL, there are 5 key tourist attractions that currently produce the highest tourist demands

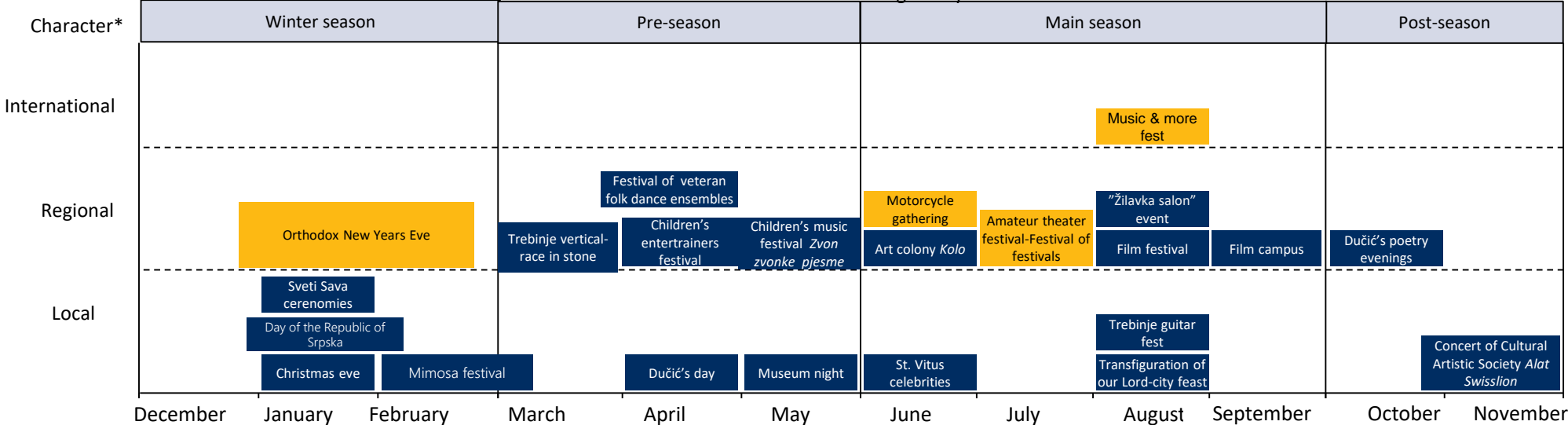
Selection of key tourist attractions

- 1 Tvrdoš monastery is located 5 km away from the City centre. It was built on the foundations of the church from 4th century and is one of the oldest monuments in the Republic of Srpska. It is extremely important for religious tourism and people of the Orthodox faith and visited by about 300 thousand visitors throughout the year. Besides the religious context, it is important for the wine production.
- 2 **Hercegovačka Gračanica** was built on the hill Crkvina above Trebinje in 2000 with the aim of fulfilling the wish of the famous Serbian poet Jovan Dučić about his last resting place.. According to his wish, it resembles to Gračanica from Kosovo. Except in the religious and cultural context, it is attractive because its location and the view of Trebinje..
- 3 Old town **Kastel** was built on the right bank of the Trebišnjica river from the needs of Turks to organize their properties in Herzegovina due to the great changes that occurred during the wars with the Holy League. Today, *Kastel* is one of the central places for tourist tours, however, it has great potential for further development through investment in the infrastructure.
- 4 **Wineries** belong to the same attraction group, considering the relatively similar experience offer. The most prominent wineries in the area of Trebinje are Vukoje, Tvrdoš and Anđelić, which vary in the quality of interpretation and additional facilities within the very buildings (restaurant, accomodation, religious facilities, etc.).
- 5 **Aqua park City of Sun** is the largest private investment in touristic facilities in the area of Trebinje and Bosnia and Herzegovina and out of all facilities (hotels, apartments, spa-centre, congress centre, sports complex, ethno village, etc.) the water amusement park attracts the most visitors- about 30 thousand during the summer season..

The key tourist attractions are defined on the basis of the current importance for the creation of tourist demand (historical importance, facilities attractiveness in the cultural context, etc.), recorded or estimated number of visitors, and the development interpretation. Although the selected attractions are mainly from the area of cultural and historical heritage, according to the findings from the field, the significance of wineries is increasing. Tvrdoš Monastery, with its own winery, annually records about 300 thousand visitors, while the wineries Anđelić and Vukoje have about 10 to 30 thousand visitors a year. The *City of Sun* is an individual tourist attraction that attracts a different market segment of guests (younger population, the population of Trebinje and the surrounding area) during most of the summer season and is therefore particularly important. In general, the conclusion is that, out of a large number of attractions that have a particularly great potential for development, most have not developed to a level that would independently attract larger number guests and represent a prominent part of the tourist offer. The next part of the document will highlight the key resources with their potential of developing.

Events are relatively well distributed throughout the year, there are no internationally attractive events

■ Events as an additional offer in the destination
 ■ Events that potentially can affect the increase of overnight stays



The table above shows the dates of performances of main cultural events and events related to religious and state holidays. It includes all events, regardless of the number of visitors. According to the client's estimate, there are around 37 thousand of such visitors per year. The amount planned to be invested in the organization of their own and co-organization of events with other participants is in total BAM 300 thousand. It can be concluded that, according to the Horwath-HTL estimate, four events have the potential to affect the increase of overnight stays (a significant increase of several thousand of overnight stays). One event is considered international – "Music &more" and is also highlighted by participants in the field. It should be emphasized that gastronomic events (e.g. "Žilavka salon" event), sports and recreational events (e.g. Trebinje Vertical 2019) and the Festival of Veteran Folk Dance Ensembles and Motorcycle gathering Trebinje were not in the submitted data, but the same were included in the given table according to the field findings and information collected from participants. Given the fact that the budget and number of visitors for the mentioned events was unknown, they were not included in the above overall estimates. The submitted list of events shows that TO Trebinje independently organizes only one event (Mimosa Festival), which partly explains the high share of locally oriented events, without the primary focus on attracting guests from foreign markets.

Source: TO Trebinje, Horwath HTL, 2020.

* Local: Population and guests located in the destination; Regional: nearby drive-in destinations (BiH, Montenegro, Croatia, Serbia); International: the rest of Europe and the world

The number of natural resource is higher than listed, however, key resources with the greatest potential have been selected

Key natural resources of Trebinje and its surroundings




Name	Description
The Trebišnjica river	The Trebišnjica river is famous for its exceptional water quality, and rich fish stocks. It is characterized by picnic sites along river flow as well as bridges on its banks. Tourist valorization is possible in terms of less demanding adrenaline activities due to the characteristics of the river.
Leotar mountain	Leotar mountain with its position dominates Trebinje. Its altitude is 1.244 m. Although it is not rich in vegetation, the mountain is attractive for various outdoor activities (mountain climbing, hiking, etc.)
Mountain massif Orjen	The Orjen massif represents a key potential for valorization in terms of the outdoor content in the area of Trebinje and its surroundings. The part of Orjen will be declared a nature park in the following period.
Ubla picnic area	It is located on the massif Orjen and today represents an attractive area for weekenders due to the existence of vegetation and pleasant climatic conditions during the summer. The area is suitable for the development of summer and winter facilities of active holiday.
Gorica lake	The storage lake has picnic areas and beaches on its bank, so valorization is possible regardless the use of the lake for storage purposes. Although smaller in area, it is more suitable for creating experiences due to smaller variations in depth compared to Bileća Lake.
Sušica river	The Sušica river is a tributary of the Trebišnjica river known for its purity of water, bathing areas and the nature that surrounds it.
Human fish	“White human fish” can be found at 46 underground locations on the territory of Trebinje. This Dinaric endemic is the only amphibian that lives in caves.
Picnic areas Lastva and Studenac	Lastva is located in the Lastva lake, while Studenac is on the banks of the Trebišnjica river. Both picnic areas are currently used by the locals as picnic areas and places to hang out, etc.
Paul’s cave	An old historical site with underground halls to which the legend of the Holy Apostle Paul is connected. There is potential for the development of speleological activities.

The cultural and historical resources are more valorized than the natural ones, but there is room for progress in that context too

Key cultural and historical resources of Trebinje and its surroundings

Period /name	Description
Roman period	Remains of a Roman bridge in the Studenac area, the Vučja bridge from the 13 th century on the site of a former Roman caravan road.
Middle Ages	Medieval towns, necropolises of tombstones at the locations of Mičevac, Klobuk, Branković tower, and the tombstone of the county prefect Grd.
Ottoman period	Old town– Kastel, Sultan Ahmed or Tsar’s mosque, Osma-pasha mosque, Arslanagić-Perović bridge, and the settlement Krš, which is located in the City centre, is a unique craft and residential core.
Austro-Hungarian period	Numerous buildings and modern look of City streets in the very centre, fortresses on the hills above Trebinje are currently in a state of despair, but are still visited by lovers of outdoor activities, locals and guests.
Churches and monasteries	Duži Monastery, Zavala, Peter and Paul’s Monastery, the Cathedral of the Holy Transfiguration, the Church of St. Clement, the Church of St. Elijah, the Church of the Holy Archangel Michael are besides their significance in religious context very important as a part of the cultural offer. A spiritual centre is being built in the settlement of Mrkonjići, which is the native village of St. Basil of Tvrdoški and Ostroški.
Dučić’s heritage	Dučić’s significance for the cultural life of Trebinje is connected with a large number of stone sculptures that he brought from his travels to his hometown and the library-gift of Jovan Dučić. Most of these stone sculptures are in the Museum of Herzegovina in Trebinje as a permanent exhibition of this museum, and some are placed in a public space in Trebinje (fountain in the City park, stone lion figures at the entrance to the City park). His library is located in the National Library in Trebinje.
Ethno villages	Uvjeća is mentioned as the most famous ethno-village, which has completely preserved its ambiantal look with stone houses built in the authentic Herzegovinian style. The village has already been used for filming. With the aim of restoration and conservation, a framework plan for the future developing project was made by TO Trebinje.
Railway Ćiro	A network of narrow gauge railways was built during the Austro-Hungarian Monarchy and the Kingdom of Yugoslavia. It connects Trebinje with the Dubrovnik coast and other destinations. The remains of the railway are rare. However, the route is still visible and known. There are several bridges and tunnels on the route itself, which together make an attractive potential for revitalization and tourist valorization.

The overview of tourist projects during their implementation by public and private sector shows three project that are currently underway....

<p>Reconstruction of the Old town</p>	<p>Period: 11/2018 – 11/2022</p>	<p>Value: more than BAM 5.000.000</p>
	<p>The project plans to reconstruct and illuminate the walls, build a ditch which would enable boats to sail again, pave streets, rehabilitate and install sewage network, LED lighting and video surveillance system, and reconstruct the buildings located in the Old Town.</p> <p>The main goal of the project is to turn this cultural and historical monument, which is one of the most famous symbols of Trebinje, into the most attractive urban zone of the City and a recognizable regional tourist attraction, which will eventually add value to the tourist offer of Trebinje and raise competitiveness in the tourist market.</p> <p><i>Holder: City of Trebinje, with the financial support of the Government of the Republic of Serbia</i></p>	
<p>Spiritual centre Mrkonjići</p>	<p>Period: 5/2019 – 1/2022</p>	<p>Value: more than BAM 2.500.000</p>
	<p>The construction of the spiritual centre in village Mrkonjići, the native village of St. Basil Ostroški and Tvrdoški, includes the building of a unique spiritual-tourist complex.</p> <p><i>Holder: City of Trebinje, with the financial support of the Government of the Republic of Serbia and the Government of the Republic of Srpska</i></p>	
<p>City of Sun Trebinje</p>	<p>Period: 9/2016 – not defined</p>	<p>Value: around BAM 120.000.000</p>
	<p>The <i>City of Sun (Grad sunca)</i> is the only tourist project in the region that will extend over an area of 80 hectares after the implementation of all its phases. By construction of this complex, tourists will have at their disposal numerous facilities such as: Aqua Park “Sunčana vrela”, “Dino Park”, Sunny Playroom (“Sunčana igraonica”), Hotel “SL Panorama”, Spa and Wellness “Galija”, Bijeli grad (“White City”) with luxury buildings and accompanying catering, ambient, cultural and entertainment facilities, recreational sports centre “SL Olimp”, ethno-village and many others.</p> <p><i>Holder: Private investment of “Swisslion” company</i></p>	

... but according to the medium-term investment plan, it is evident that there are a number of project ideas directly or indirectly related to tourism

#	Project name
1	Reconstruction and construction of the City market
2	Support to the construction of eco and ethno complexes
3	Construction of tourist rest areas / lookouts on the City access roads
4	Use of Bileća lake potentials
5	Construction of pedestrian/bicycle trail Aleksina međa - Trebinje
6	Development of the Trebišnjica river banks (pedestrian and bicycle trails, etc.)
7	Cable cars (Crkvina, Strač, Gljiva) feasibility study and their construction
8	Bicycle trail (Nudo-Trebinje-Ivanica) on the old railway route
9	Development of hiking trails
10	Auto-camp ^s
11	Botanical garden
12	Trebinje Airport
13	Disassembly and assembly of the King Alexander Bridge
14	Reconstruction of the Mountain lodge in Ubla
15	Physical planning-reconstruction of the settlement Krš
16	Golf centre (Golf resort)
17	Project <i>Otok</i>

The client submitted to Horwath HTL three tourist projects that are currently in different stages of implementation. Two projects - Renovation of the Old Town and the Spiritual Centre Mrkonjići will be implemented by the City of Trebinje in cooperation and with the financial assistance of the Government of the Republic of Serbia. The implementation of the third project-City of Sun, funded completely from private funds, began in 2016. Given the size, potential of the location and further plans of potentials exploitation, the planned completion of implementation is not stated. The table on the left shows a selection of conceptual designs submitted in the Medium-term *Capital* Investment Plan of the City of Trebinje. The number of project ideas is significant, but only certain number of them has documentation (prefeasibility/feasibility studies, concepts, etc.) that would present project ideas in a professional way in the investment market. In this context, it is should be mentioned that case study for the airport is under preparation, while for the Golf resort project, a market study has been prepared. On the other hand, the private sector (with a few exceptions) invests spontaneously, without a plan to differentiate the business, and without the goal of creating value-added products based on the destinations key sales propositions. Considering the increase of tourist traffic and opportunities for financing/co-financing through various international competitions, the planned investments in tourist infrastructure of Trebinje and the surrounding area should be launched in the following period, based on the defined tourism vision. In this context, the project ideas and initiatives which will improve the competitiveness of Trebinje tourist product, must be defined.

2.3. TOURIST ORGANIZATION OF TREBINJE

Although the tourist organization total budget grows under the influence of the tourist tax, more than 50% of the budget was financed by the City of Trebinje in 2018

Revenues of TO Trebinje in 2017 and 2018 (BAM)

#	REVENUES BY TYPE	2017	%	2018	%	2018/2017
1	Remittances from the City budget	198.250,00	62,59%	210.947,00	52,40%	6,40%
2	Revenues from residence tax	108.043,00	34,11%	151.089,00	37,53%	39,84%
3	Revenues from refunds	0,00	0,00%	21.320,00	5,30%	/
4	Revenues from donor funds	2.475,00	0,78%	7.000,00	1,74%	182,83%
5	Revenues from project implementation	4.000,00	1,26%	6.950,00	1,73%	73,75%
6	Revenues from souvenirs sale	3.990,00	1,26%	5.273,00	1,31%	32,16%
TOTAL		316.758,00		402.579,00		27,09%

In 2018, the total budget of TO Trebinje amounted to BAM 402.579,00. Compared to 2017, it is higher by 27,1%, or BAM 85.821,00 in the absolute amount. Growth is visible in all items shown, however, the strongest impact on growth had the residence tax with 50% of the total growth created. Revenues from the residence tax in 2018 produced 37,53% of total revenues and, although the fastest growing item of revenue, is still not crucial given the dominant share of revenues from the City of Trebinje. The structure of revenues shows that more than half of the budget (52,40%) is financed from the City budget, which indicates the importance of financing the tourist organization by the City of Trebinje. Compared to 2017, in 2018 the amount of remittances of the City of Trebinje increased by 6,40% or BAM 12.697,00.

According to the information from the field, further growth of residence tax revenue is expected in the following years due to several items: 1) activities of the City of Trebinje and TO Trebinje with the aim of registering bed places in private accommodation (distribution of design vouchers, etc.), 2) enhanced control and inspection of hotel facilities due to previous non-registration of guests and 3) natural growth of tourist traffic. It is necessary to point out that the revenues from the residence tax are paid to the special account of the City of Trebinje and according to the Residence Tax Act they must be spent exclusively for promotional activities.

When administrative and material expenditures are excluded from the analysis, TO Trebinje invested the most in events in 2018

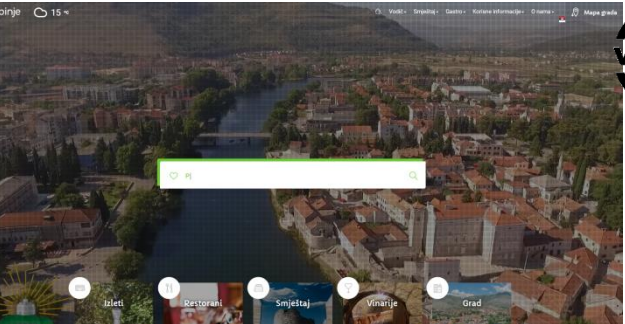
Expenditures of TO Trebinje in 2017 and 2018 (BAM)

#	EXPENDITURES BY TYPE	2017	%	2018	%	2018/2017
1	Gross salaries and employees compensation	166.099,00	58,11%	193.839,00	48,15%	16,70%
2	Other non-mentioned expenditures	49.910,00	17,46%	132.323,00	32,87%	165,12%
3	Professional services costs	42.180,00	14,76%	41.949,00	10,42%	-0,55%
4	Costs of materials used at fairs	6.774,00	2,37%	9.975,00	2,48%	47,25%
5	Rent of space and equipment	6.619,00	2,32%	8.058,00	2,00%	21,74%
6	Material costs	6.883,00	2,41%	7.406,00	1,84%	7,60%
7	Travel and accommodation expenses	4.697,00	1,64%	5.664,00	1,41%	20,59%
8	Overhead costs	1.399,00	0,49%	1.688,00	0,42%	20,66%
9	Ongoing maintenance costs	1.274,00	0,45%	1.677,00	0,42%	31,63%
TOTAL		285.835,00		402.579,00		40,84%

The table above shows that expenditures of gross salaries and employees compensation (15 employees at the end of 2019) are the dominant item of expenditures on which half of the budget is spent in the two observed years. In order to have a better insight into expenditures, 9 types of expenditures were analysed for the purposes of the document. The conclusion is that in addition to administrative and material expenditures, TO Trebinje invests significantly in events (a total of 27% of the budget), fairs and other promotional activities- a total of 20% of expenditures. TO Trebinje also participates in numerous international fairs in cooperation with the Tourist Organization of the Republic of Srpska. They have lately become a key marketing activity of TO Trebinje, and the number of investments in participation in fairs has increased. It should be emphasized that TO Trebinje independently manages the website and social media, without the introduction of outsourcing of professional marketing agencies. The rest of the expenditures are spent on material expenditures such as current maintenance, materials, etc.

2.4. MARKETING

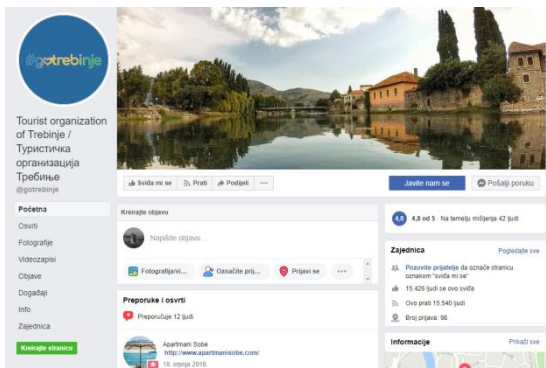
TO Trebinje is together with the tourist website on the social networks Facebook, Instagram and Twitter, and on YouTube (Facebook, Instagram, Twitter, You Tube)



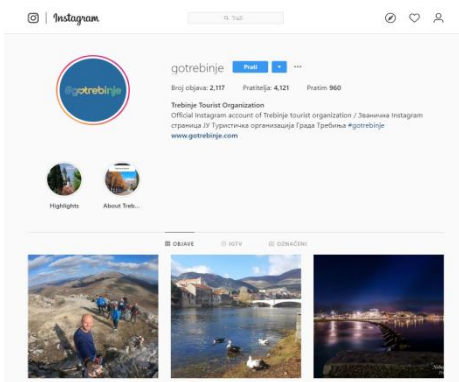
www.gotrebinje.com



Official logo and visual of TO Trebinje



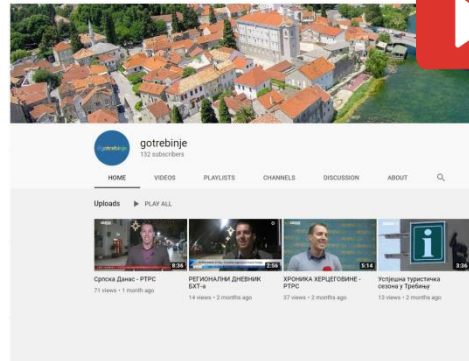
Tourist organization of Trebinje
15.426 likes



gotrebinje
4.121 followers



gotrebinje
268 followers



gotrebinje
132 subscribers

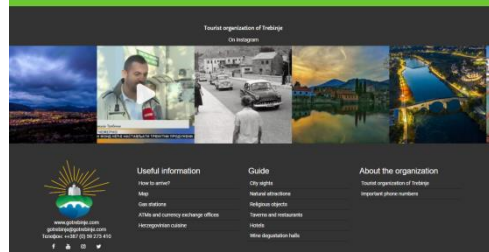


In 2017, TO Trebinje developed a new website and implemented a rebranding marketing strategy with the key component #gotrebinje

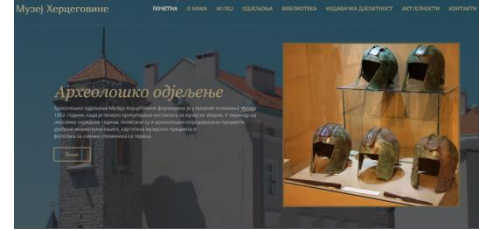
Key findings of the website gotrebinje.com analysis

- The website is of contemporary design and shows the motifs of the destination predominantly through video material and photographs.
- The content of the site is available in Serbian (Cyrillic and Latin alphabets), English and Russian.
- The site is structured in several vertical and horizontal sections. The first part of the site, which is visible immediately after opening, is dominated by the search engine for terms on the site, and the menu: guide, accommodation, gastro, useful information about us. This is followed by a section that presents key excursions, restaurants, accommodation facilities, wineries and the City through its history, location, climate and other basic information.
- The part of the site is an interactive map of the City that presents numerous points of interest and experiences, clicking on them you get more information about the point itself.
- The other important site part is the section *Popular Destinations*, i.e. the destinations visitors are most satisfied with.
- The site also provides the ability to download a destination catalogue "Trebinje, a place for all generations" in several foreign languages in PDF. That part of the site does not fit into the rest of the site due to a different design, while the link to the Conditions for accommodation facilities categorization on the home page does not fit because of its content, which is more convenient to be posted in separate sections.
- In general, the site is in line with the colours of the logo and represents the identity of the brand, except in a few prominent cases.

- Also, on the home page can be found local news, available only in Serbian.
- It should be pointed out that the site is connected with other destination participants - the City of Trebinje, the Cultural Centre of Trebinje, and the Museum of Herzegovina. Apart from the City site, other sites are not available in English, while the site of Museum is exclusively in Cyrillic.



Download and visit



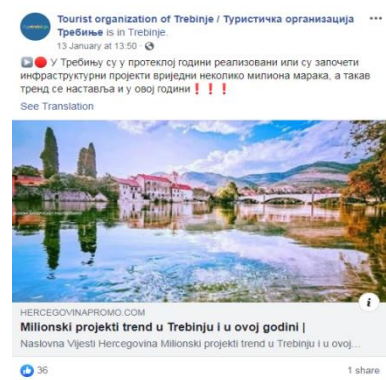
Događaji i Vjesti



The content on the Facebook profile of TO Trebinje is mainly intended for the local population

Facebook profile: Tourist organization of Trebinje

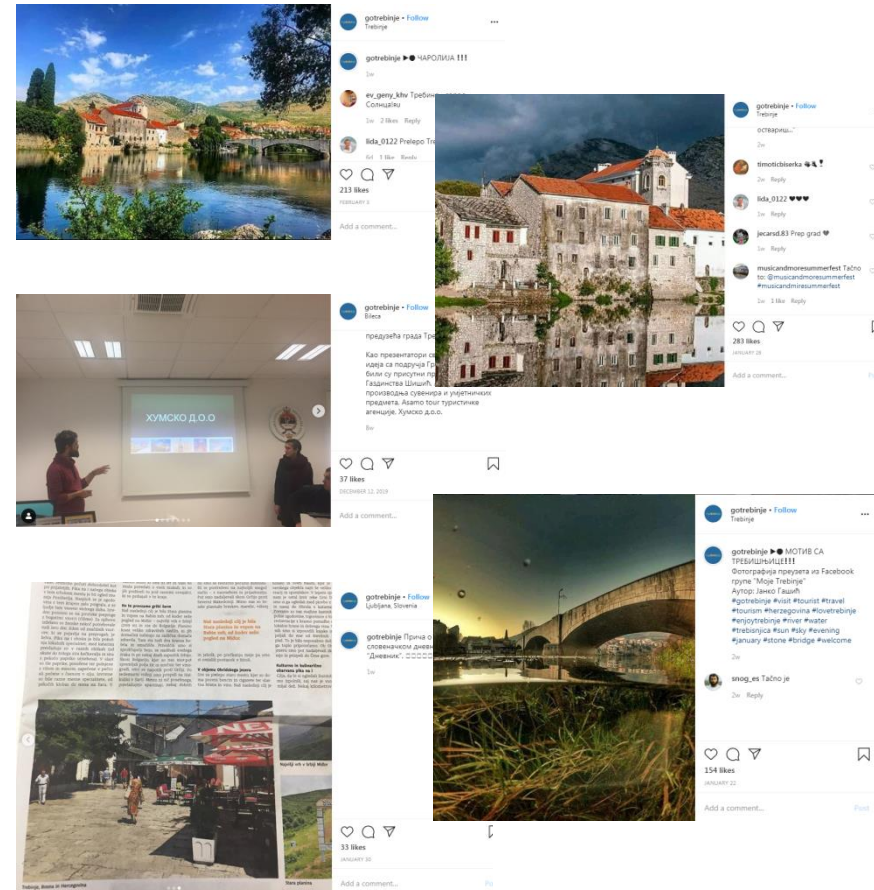
- Official Facebook profile of the Tourist Organization of Trebinje has around 15.420 followers. The content is posted daily and posts make about 120 interactions (comments, likes and shares).
- The photo with destination motif is posted on the profile home page, which is not changed frequently, and most often shows the City motifs, the visual identity of the destination or a promotional campaign.
- The posts of high quality and attractive destination motifs photos occupy just over half of all posts, and regularly achieve greater engagement of followers in the form of comments, likes and shares. However, they do not have a clear *call-to-action*.
- On the other hand, a significant number of posts is exclusively informative and mainly intended for the local population. Almost all posts are written in the local language and alphabet, because of which are not adequate for promotion in the international market.
- In general, the conclusion is that the profile shows progress from the average quality of official tourist profiles and that communication strategies are not clearly defined, what significantly affects the quality.



Instagram content does not mainly differ from Facebook

Instagram profile: gotrebinje

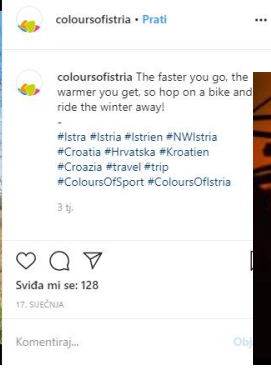
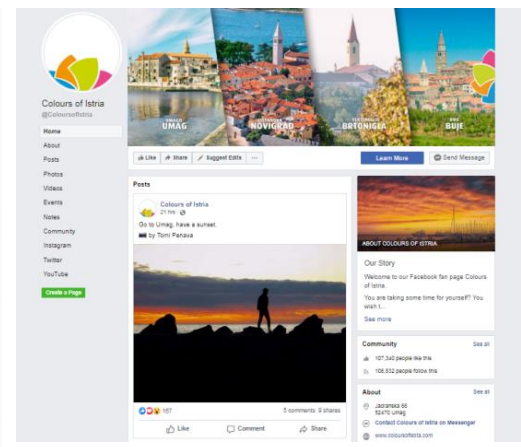
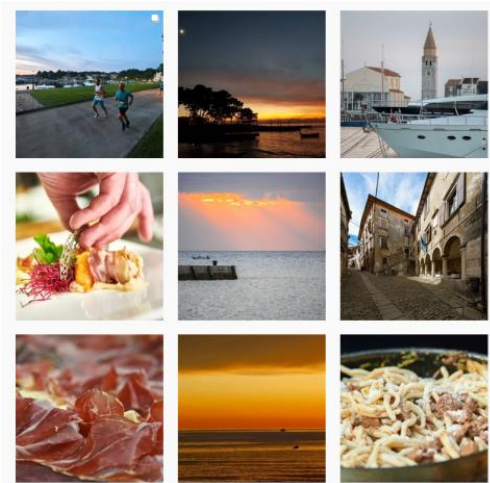
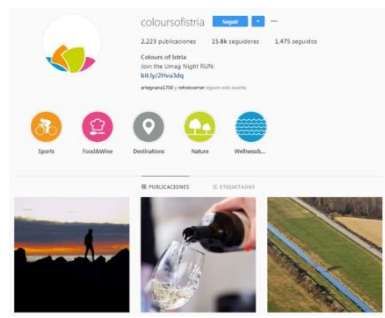
- The official Instagram profile of *gotrebinje* has a total of 4.116 followers and 2.117 posts.
- On average, the content is posted daily, but mostly does not differ from that posted on the Facebook profile. Most posts are photos with a very small number of videos and occasional use of the hashtag #gotrebinje.
- Compared to the Facebook profile, the Instagram profile has slightly lower, but still significant share of an inadequate content (one third), which is mainly informative and intended for the local population. Almost all content is posted in the local language and alphabet and as such is inadequate for addressing the main emitting markets abroad.
- The photos are mostly of low quality, which opens up a lot of space for better communication of the destination’s unique sales propositions (USP’s) through professional photos.
- The content posted by followers or tourists is occasionally shared on the profile (user-generated content -UGC).
- The Instagram Stories option is used frequently, it is used for sharing the content of followers or participants in the destination’s tourism (events and happenings of local caterers and entrepreneurs).
- Lack of strategic approach to posts and diversity of content between Instagram and Facebook profiles (the same case is with Facebook), which makes the overall experience much worse than potentially possible, given the small number of quality photos.



#1 Example of social media good management practice: Facebook and Instagram profiles of Northwestern Istria

The cover photo of the Facebook profile Colours of Istria is visually noticeable and attractive, and like other posts, it thematizes the main motifs of the destination through high quality content. All posts are in English, addressing the wider international emitting market, and occasionally include a call-to-action. Sharing the content created by followers or tourists (UGC - User generated content) encourages interactivity with followers and traffic.

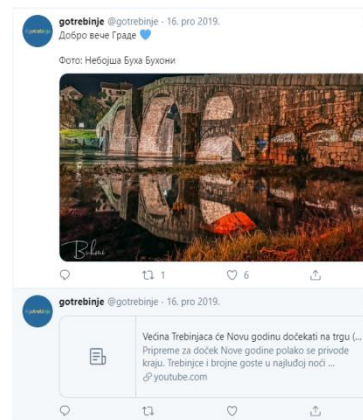
The Instagram profile strategically uses the Instagram story option to promote cultural, sports and gastronomic events and manifestations or the private sector offer (restaurants, museums, sightseeing tours ...), in a shaped and systematic way.



Twitter is almost identical in its content to Facebook and Instagram profiles, while the YouTube channel lacks professional promotional videos

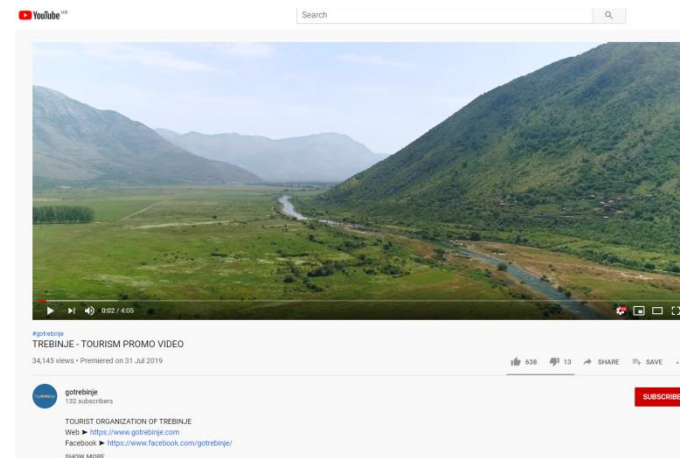
Twitter profile: gotrebinje

- The official *gotrebinje* Twitter profile has 132 subscribers, and posts are published regularly on a daily basis, sometimes more times during a day.
- As with other social media profiles, the content on the Twitter profile is posted in Cyrillic and the local language, suggesting that the content is intended for the local population. Posts generally result in a maximum of 10 likes and do not encourage the start of conversations among users.
- According to examples of good practice, the profile lacks dynamics in terms of attractive and short videos and interesting information about tourist products of the destination.



Youtube channel: gotrebinje

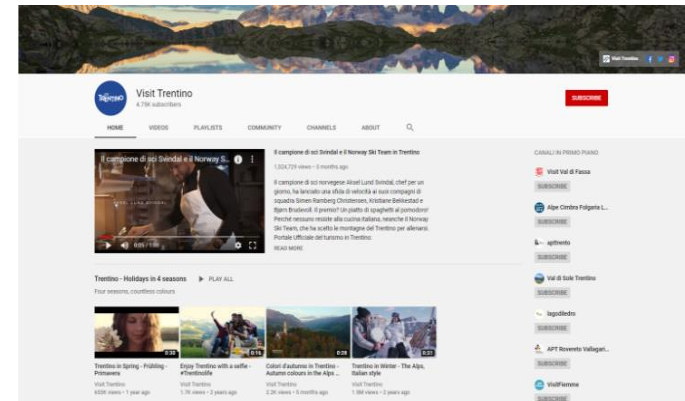
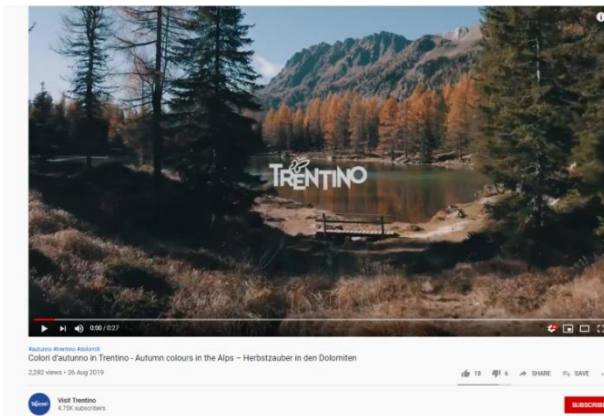
- The official *gotrebinje* Youtube channel has 132 subscribers and around hundred posted videos.
- Most of posted videos refer to media appearances of Trebinje tourism sector representatives and the titles of these videos are in Cyrillic and Serbian. These videos generally have very low ratings (mostly less than 50, up to a maximum of 485 for the Aqua Park video clips).
- On the other hand, the results for tourist promotional videos are significantly better, for example the video TREBINJE-TOURISM PROMO VIDEO collected 34 thousand views in 6 months since its post.



2 Example of social media good management practice: Youtube and Twitter profiles of Italian province Trentino

By a strategic and creative approach to managing the YouTube channel, the Trentino Tourist Board involved several people from public life in the production of video content, whose profile corresponds to the target segment of tourists. The results of the campaigns were a great success, which is reflected in the total channel traffic of over 22 million, out of which some videos have up to 4 million views.

The Twitter profile clearly displays and encourages the use of hashtags in order to encourage interaction with users. The profile is dynamic and attractive due to the numerous posted high-quality videos. The video additionally highlights the experiences and activities available at this destination, and encourages interaction with followers.



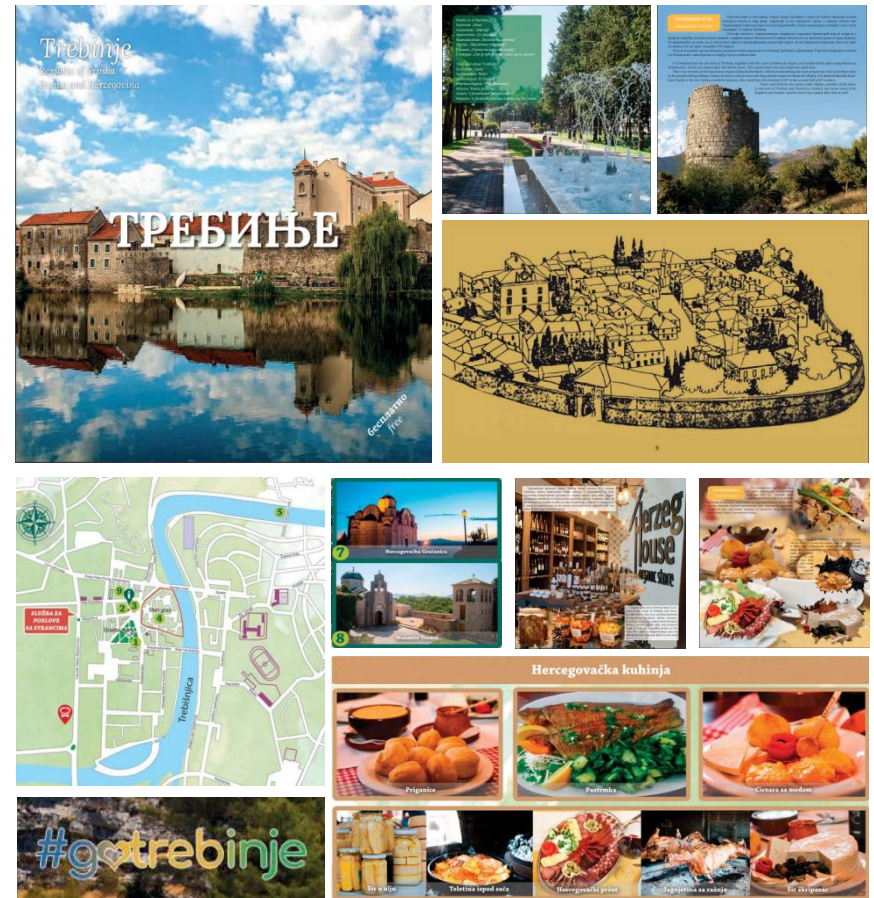
The analysis of the Tourist organization printed material has shown a significant room for improvement, primarily the part of visual attractiveness

Overview of the TO Trebinje printed material

The printed materials of TO Trebinje provide basic information about the destination and its tourist offer. The presentation of destination’s points of interest is at an average level with significant room for improvement. The analysed promotional materials have the following properties:

- The use of the official brand of the TO organization is not uniformed on all printed materials;
- The colours and font used in the analysed materials is not uniformed;
- Maps presented in certain printed materials show points of interest in an insufficiently adequate way; design progress is possible;
- The design of the printed material showing the list of restaurants, accommodation facilities, wineries and points of interest for active tourism is of a classic display and its appearance does not clearly invite users to action;
- Printed materials presenting general information about the destination describe the main points of interest of the destination in a quality manner. The analysed materials show the biggest shortcoming in the inadequate visual attractiveness and insufficiently emphasized invitation of the users to action, i.e. consumption of the tourist offer of Trebinje.

Therefore, although some of the materials are at a satisfactory level of quality, there is a lack of uniformity in the use of the official brand, colours and fonts, and reduction of printed material is certainly needed.



2.5. TOURIST VALUE CHAIN

The analysis of the tourist value chain has been done by combination of the field work and office research

A tourist value chain is a set of relations of products, services and experiences that tourists consume or buy during their arrival at the destination and their stay there. For the purposes of the Strategy, an adapted methodology of the tourist value chain-UNWTO analysis was used. The analysis of the value chain components was done by a combination of office research, personal interviews, and for the most part by primary field research using the “secret guest method”. The analysed components of the value chain are listed below, and methodological guidelines are given for each.

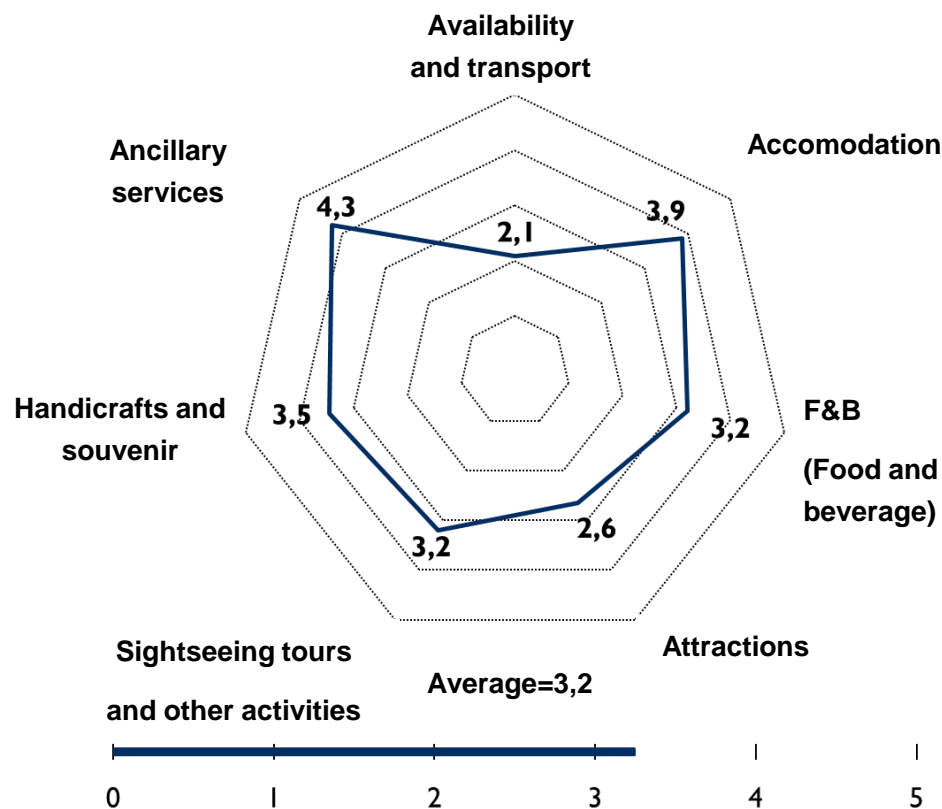
Component	Office research	Field work
Availability and transport	Search of the relevant transport-related websites (bus stops, travel agencies, etc.) at the destination and national level.	Tour of the key interests at the destination (bus stations, parking lots, use of taxi transport, etc.) and travelling to destinations.
Accommodation	Analysis of reviews and ratings on the Booking.com page for a maximum of 5 facilities with the most reviews in Trebinje, hotels and private accommodation, categories from 3 to 5 stars.	Evaluation of facilities where the Horwath HTL team is located during their stay at this destination, tour of other facilities and evaluation according to the unified evaluation form and evaluation guidelines of the Horwath HTL secret guest analysis
Food and beverage	Analysis of reviews and users ratings of the Tripadvisor platform for the best 10 facilities in Trebinje, and rating of the quality and attractiveness of the online presentation and diversity of the eno-gastronomic offer.	Tour of the facilities in the destination with consumption and evaluation according to the unified evaluation form and evaluation guidelines of the Horwath HTL analysis of the secret guest.
Attractions	Analysis of reviews and users ratings of the <i>Tripadvisor</i> platform for the top 10 attractions in Trebinje, rating of the quality and attractiveness of the online presentation of attractions and online booking and shopping options.	Tour of attractions in this destination and evaluation according to a unified evaluation form and evaluation guidelines of the Horwath HTL analysis of a secret guest.
Sightseeing tours and other activities	Analysis of the availability, visibility and number of trips on the <i>Tripadvisor</i> platform and on other websites.	Consumption of the service at this destination and evaluation according to the unified evaluation form and evaluation guidelines of the Horwath HTL secret guest analysis.
Handicrafts and souvenirs	Items of this component were evaluated according to field findings.	Tour of souvenir shops and other stores in this destination and evaluation according to the unified evaluation form and evaluation guidelines of the the Horwath HTL secret guest analysis.
Ancillary services	Items of this component were evaluated according to field findings.	Destination tour and personal interviews.

The average rating of all tourist value chain analysed components is 3,2, out of a total of 5

Ratings overview by components

Component	Office research	Field work	Total
Availability and transport	1,7	2,5	2,1
Accommodation	4,7	3,0	3,9
Food and beverage	2,4	4,0	3,2
Attractions	2,4	2,9	2,6
Sightseeing tours and other activities	2,2	4,1	3,1
Handicrafts and souvenirs	3,5	3,5	3,5
Ancillary services	4,3	4,3	4,3

Tourist value chain analysis results



Availability and transport is the worst rated component of the analysis, key problems are traffic infrastructure and bus parking

Availability and transport – 2,1



- Traffic signage and marking of the main tourist sites are at a satisfactory level with frequent markings, especially in the City. However, in some places there are too many markings that are not uniform and thus create confusion.
- The bus station is functional, clean and well equipped.
- Taxi transport in this destination is well organized and strives for modernization which is confirmed by application that facilitates taxi ordering.



- One of the greatest problems in Trebinje is the poor traffic infrastructure, especially the access roads to the City (except for those towards Dubrovnik and Herceg Novi, which are in better condition).
- The bus station does not have an official website. Timetable is available on the website and offers basic information that is presented in an insufficient quality. Buying a ticket on these websites is not possible.
- Bus parking and the space for visitors unloading in the City centre is poorly organized and creates large crowds in the peak season.
- Parking payment is possible with coins and parking tickets (can be bought at kiosk), while payment via SMS is possible only for guests with Bosnia and Herzegovina phone number.



Although price was identified as the main competitive advantage, the analysis indicated shortcomings in the accommodation offer, especially in hotels

Accommodation– 3,9



- Regarding hotel accommodation, the analysis showed that the cleanliness, rooms comfort and the friendly staff stand out as positive characteristics.
- Price-quality ratio and affordable room prices are recognized as one of the fundamental competitive advantages of this destination.
- Hosts courtesy and kindness, as well as the excellent equipment of the apartments are the most frequently mentioned advantage in the analysis of private accommodation.



- Staff professionalism in all facilities visited was below the usual hotel business standards .
- Knowledge of foreign languages is not at a satisfactory level which makes communication with guests very difficult.
- Furniture and equipment quality in hotel rooms is not at a satisfactory level.
- Additional offer of analysed hotels is almost non-existent
- Breakfast at the hotels visited was relatively poor, which was also confirmed by guests who commented their stay at the hotels on Booking.com.
- Access for disabled people is poor.



Food and beverage area attracts a large number of guests with its quality and low prices, however, there is a lack of offer diversity

Food and beverage– 3,2



- Affordability, friendly staff and generous portions are the main advantages of the analysed restaurants.
- The interior design of the analysed buildings was mostly at a high level with a recurring pattern of traditional motifs as a fundamental element of attractiveness.
- Food and beverage are of a good quality with a visible emphasis on the traditional offer of dishes. The presentation of food and beverage was also identified as high quality.
- The quality of wireless connection in all visited facilities is at a high level.



- Smoking is allowed in the facilities, which significantly ruins the overall experience of the facility.
- The online presentation of the analysed catering facilities is at an inadequate level with mostly outdated websites that do not offer the most important information.
- The analysis of facilities on *Tripadvisor* showed that only one of the 10 analysed corresponds to guest reviews.
- Low level of diversity of the restaurant offer, with 1 restaurant identified (Restaurant Vukoje) that deviates significantly from the usual offer of food and drink, i.e. that its approach is focused on a different concept of food preparation.



A small number of significant attractions with a large number of tourist resources explains the currently low level of the tourist offer development

Attractions – 2,6

- Visitors of the attractions emphasize the good quality for the money invested, the staff kindness and the pleasant environment as the main advantage of the existing attractions in the destination.
- Also, visitors praise the unique ambience of the Old Town and the Trebišnjica river, emphasizing this attractive component as sufficient for the destination visit.
- Hercegovačka Gračanica and Tvrdoš Monastery stand out as more developed attractions. They with their attractive interior, exterior and interpretation, differ from other attractions of the destination.



- Low development of tourist resources in this destination makes it difficult to analyse this component from the perspective of insufficient number of real attractions.
- Interpretation of certain attractions / resources (Museum of Herzegovina, Old Town, Arslanagić Bridge, Strač Fortress, etc.) as well as knowledge of foreign languages is not good enough, which greatly affects the satisfaction of visitors and leaves the impression of unprofessional staff.
- The quality and functionality of sanitary facilities is not at a satisfactory level.
- Souvenir shops, as a part of these attractions (Museum of Herzegovina and Arslanagić /Perović Bridge), either do not exist or are insufficiently attractive.
- Traffic markings to the attractions should be further improved.



Excursions and sightseeing tours are currently an underdeveloped component of this destination

Excursions and other activities – 3,2



- The professionalism and guides awareness is at a high level and the City tour is very well organized.
- Low price and good organization of sightseeing tours stand out as main advantages, based on the analysis of excursions and tours on the *Tripadvisor* platform.
- The possibility of booking and paying sightseeing tours via the *Tripadvisor* platform greatly facilitates their design and implementation.



- Insufficient number of excursions presented on the *Tripadvisor* platform indicates the underdevelopment of this tourist offer component. Low level of diversity of existing excursions and tours that are mainly focused on the tour of the City and facilities offering tasting of indigenous food and drink.
- Independent organization of excursions in terms of outdoor activities (cycling, hiking, etc.) is somewhat more demanding due to insufficient signage, available maps and inadequate trail surface. Also, a self-guided points of interest tour is more difficult given the brown signage which is sometimes confusing.
- During sightseeing tours, insufficiently maintained parts of the destination are visible in some places.

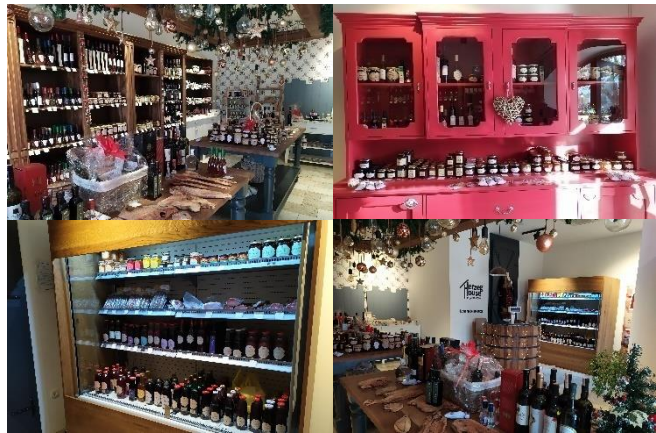


Apart from the Herzeg House, whose offer is based on eno-gastronomy, the offer of other indigenous products in Trebinje is insufficiently developed

Handicrafts and other souvenirs– 3,5



- Persistence of a unique store (*Herzeg House*) that unites all eno-gastronomic products from the destination and presents them to visitors and locals in a quality way.
- Staff awareness and hospitality stand out as one of the advantages of visited specialized stores.



- Limited offer of other autochthonous handicrafts and souvenirs characteristic for Trebinje and Herzegovina in general.
- Indigenous products sold outside the *Herzeg House* are insufficiently highlighted, without designed information and clearly stated origins and prices.
- Access for disabled people is not at an adequate level.

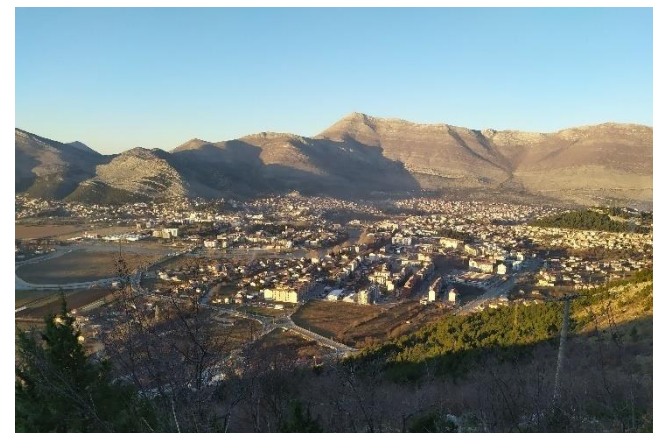


Due to Trebinje status, its ancillary services are at a high level

Ancillary services – 4,3



- Trebinje has a City status, so most of its ancillary services such as banks, post office, exchange offices, emergency services, etc. are at a high level.
- The location of the Tourist Information Centre is very good. The content of the material available in this centre is at a satisfactory level.



- Lack of digital content in the Tourist Information Centre that would present the tourist offer of the destination in a more interactive way.
- The gas station in the City centre is unnecessary and with its unattractive appearance disturbs the ambient harmony of the Old Town and the City park located nearby.



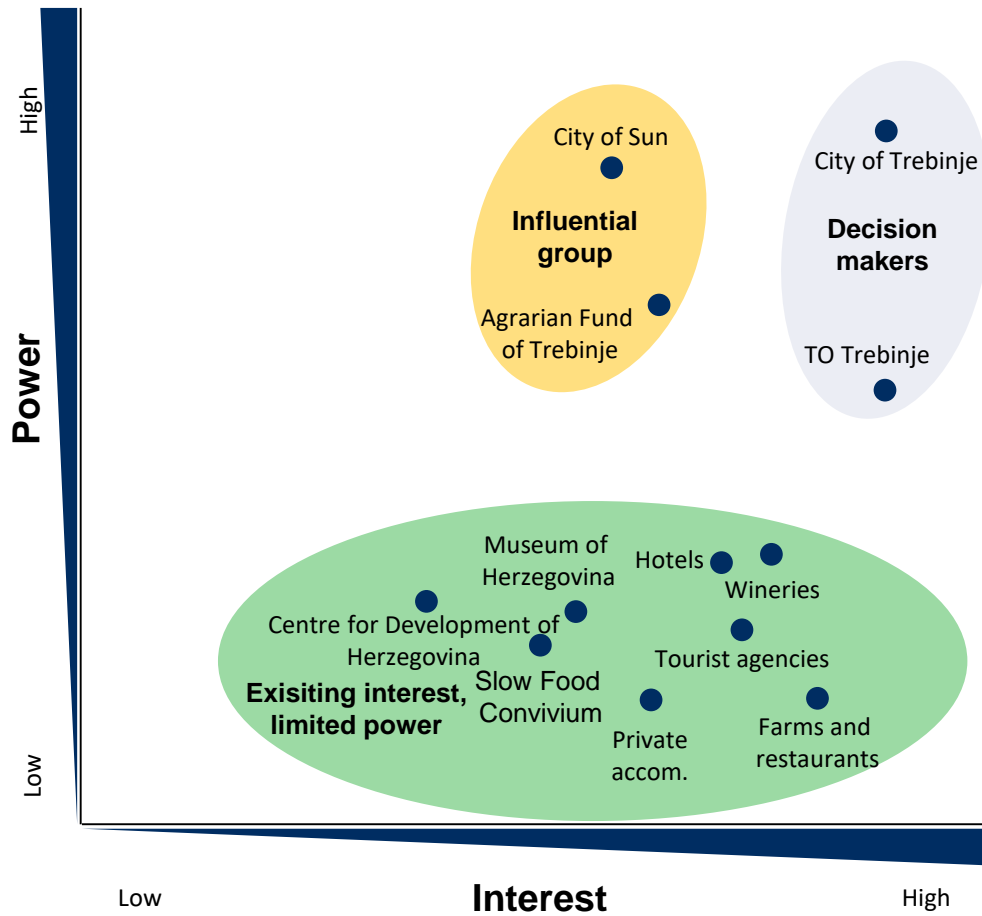
Key findings of the tourist value chain analysis

- The basic precondition for further tourist development is providing better access to the destination. From that reason adequate traffic infrastructure in the direction Trebinje- Mostar, Foča and Nikšić must be provided.
- Although regular bus transport is not one of the key ways to get to the destination, the creation of an official website is imposed as a logical and mandatory step to simplify the availability of basic information and the possibility of buying tickets for destination visitors.
- The lack of space is obvious for unloading visitors who come on a daily basis by tourist buses.
- From the perspective of foreign individual guests, there is room for improvement in the context of parking fees and the key points of interest marking in order to facilitate access and improve the experience of the destination.
- Staff professionalism in almost all facilities related to tourism is at a low level, which is mostly reflected in the lack of respect for standard professional behaviour procedures, knowledge of foreign languages, etc.
- A certain part of hotel facilities is outdated in the context of design, however, more significant shortcoming is the poor diversity of the offer, and facilities that mostly offer accommodation without ancillary services. Also, accommodation facilities (attractions too) are not adapted for people with disabilities.
- In general, the online presentation of the tourist offer by the private sector is at a low level in the context of multimedia quality, up-to-date data, as well as the general attractiveness and inspiration to visit.
- Food and beverage offer is of a high quality and its main competitive advantage is high quality/price ratio. However, Trebinje does not currently have restaurants that will prevent the one-dimensionality of the offer and the exclusive orientation to traditional cuisine.
- Certain attractions currently provide a high quality experience (e.g. wineries), however, in some attractions there is significant room for improvement, i.e. the introduction of an innovative way of interpreting facilities through digitization and “storytelling”. On the other hand, a large part of the points of interest that are currently considered attractions in this destination are only a resource and have a strong potential for further development.
- Excursion offer in this destination is simple and non-diverse; there is room for significant improvement in terms of creating new attractive experiences by local travel agencies, i.e. a move from the currently prevailing historical and gastronomic themes.

2.6. PARTICIPANTS MAPPING

For the purpose of mapping key participants in tourism, the Horwath HTL team conducted 28 personal and telephone interviews

Matrix of interests and power of influence on tourism development



For the purpose of key participants mapping and obtaining input information, at this stage a total of 28 personal and telephone interviews were conducted with participants whose list was agreed with the client.

The following participants were interviewed:

Public sector:

- City of Trebinje (Mayor, Deputy Mayor, Department of Spatial Planning), TO Trebinje, Agrarian Fund of Trebinje, Museum of Herzegovina.

Civil sector:

- Centre for Development of Herzegovina, Slow Food Convivium
- Mountaineering association “Vučji zub”

Private sector:

- City of Sun Trebinje,
- Monastery and winery Tvrdoš,
- Hotels: “Leotar”, “Nar”, “Platani”, “Central Park”, spa and hotel “Studenac”,
- Restaurants, wineries and farms: motel “Stara Hercegovina”, restaurant “Kolo”, wineries “Vukoje” and “Anđelić”, farm “Kisin”

Main conclusions from the interviews of key participants in the tourism of this destination (1/2)

Trebinje has built a position in the tourist market based not only on its geostrategic position, but also on the other offer characteristics

Although the key competitive advantage of Trebinje is its geostrategic position, the growth of tourist demand occurred due to the accommodation and catering services price competitiveness, hospitality, and excellent climatic conditions throughout the year. The geostrategic position is not fully used yet and Trebinje is strongly dependent on guests from Dubrovnik and Montenegro, which is reflected in the short stay of guests and lack of interest in amenities within the destination.

The key problems of tourism in Trebinje have to be observed in a broader republic, federal and regional context. One of the main issue is that tourism is not adequately regulated by law. This creates the possibility of a high share of illegal employment in tourism. On the other hand, there is a paucity of tourist inspection, that is, a system of supervision and control that will monitor tourism development. Since the young population work in Dubrovnik during the season for significantly higher salaries, Trebinje lacks professional staff in tourism too. Also, due to the deficiency of control and efficient spatial planning, there is a particularly rapid growth of capacity in private accommodation. Some of the key operational problems at the moment are: 1) borders with Croatia and Montenegro, where long waits are recorded during the summer season, 2) quality of roads in certain directions (e.g. towards Belgrade, Mostar, Nikšić).

Despite external factors affecting the growth of tourist traffic, Trebinje, Republic of Srpska and B&H face major challenges

With the aim of further tourism development, tourist investments in several areas are crucial

Currently, three capital projects are being implemented in Trebinje and its surroundings: the Development of the Old Town, the Spiritual Centre Mrkonjići and the City of Sun Trebinje. In order to improve the tourist offer, other small projects, which will be based on destination advantages, are necessary. In the context of significant potentials for further destination development, the participants especially emphasized active tourism.

Among the tourist resources that should be included in the product development, the following ones are stated: the mountains Orjen and Leotar, the Trebišnjica river, the narrow-gauge railway Ćiro, the Austro-Hungarian towers and caves, but also many other locations listed in the previous parts of the document. Also, an insufficient number of experiences and activities created by local destination marketing companies (DMC) was pointed out, through whose operation would be significantly easier to shift the focus of the demand to the Trebinje tourist product.

Main conclusions from the interviews of key participants in the tourism of this destination (2/2)

The cross-border cooperation potential has been recognized, but has not been sufficiently exploited to this date

Participants as an advantage emphasize the proximity of confirmed coastal destinations as an advantage. However, there is a unique viewpoint that their proximity has not been used to a sufficient extent. In the next period, activities that will lead to the development of relations with cross-border destinations must be launched, all in the common interest of improving the quality of included destinations tourist product. In this context, the Dubrovnik coast with Dubrovnik is primarily mentioned as a key component for establishing cooperation and realization of joint projects, but also Herceg Novi in Montenegro.

Due to the proximity of market-confirmed destinations, the initial momentum of tourism development is eno-gastronomy i.e., quality wines and affordable indigenous local cuisine. Among the local products that stand out for their quality are: prosciutto, cheese, pomegranate, kaštradina (dried mutton or sheep meat -ribs or legs), cicvara (gruel), collard, rakija and lamb, as well as the autochthonous variety of corn that grows in Popovo polje, and bean “poljak”. These products can be additionally commercialized by developing specialized tasting places in households. In the context of this product development, one of the key participant in the tourism of this destination is the Agrarian Fund, which significantly helps local farmers. The Fund is responsible for the implementation and operationalization of the project Herzeg House, which has become the largest brand in the Republic of Srpska. Apart from eno-gastronomy, within the framework of further development, specific forms of tourism that have the potential for more concrete development in the destination area are: rural, excursion, sports, cultural, active and religious tourism.

After the hitherto spontaneous tourism development, it is time for a strategic approach to the tourist valorization of Trebinje resources

In the cooperation of destination participants in tourism much higher level of synergy is needed

In the context of destination management and according to the participants opinion, the Tourist Organization works well. However, there is a lack of cooperation of participants from various fields (hoteliers, restaurants, agencies, households, guides, etc.). In this sense the possibility of progress in the operation of the tourist organization is seen, which can be a platform for gathering interested participants.

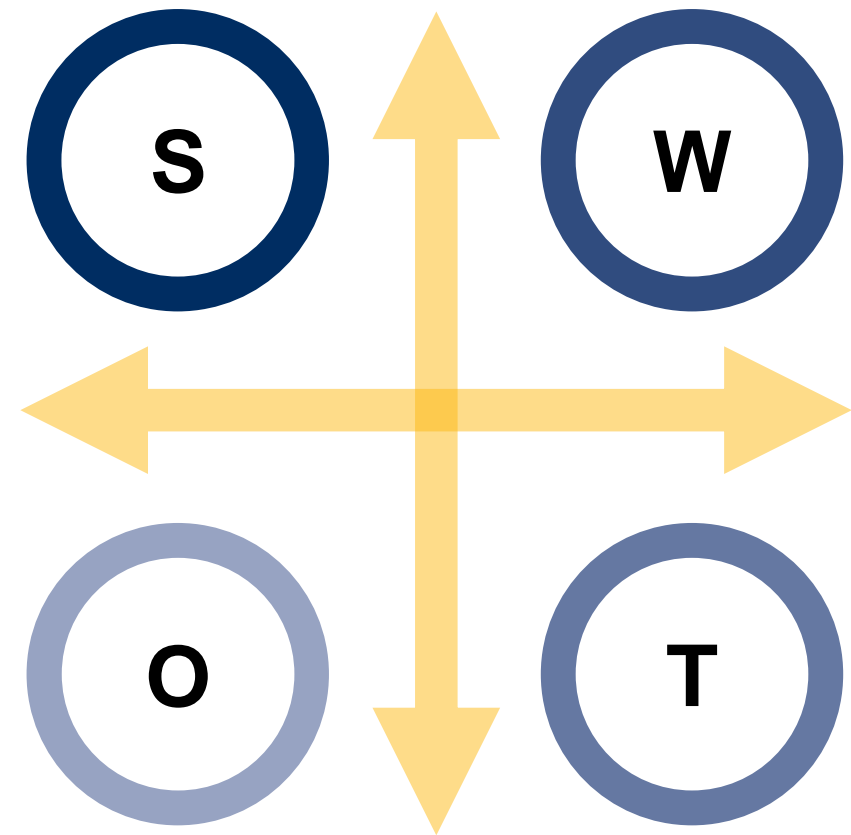
Although there is no legal basis for establishing a management mechanism in which the private sector would also participate, most of the interlocutors at the meetings expressed a clear willingness to cooperate with the aim of further development. Also, the successful implementation of the Strategy and further tourism development in general will not be possible without clearly harmonized interests of private participants who are willing to invest in Trebinje tourism, on the one hand, and key governing bodies on the other.

2.7. SWOT ANALYSIS

Strengths, weaknesses, opportunities and threats for tourism development have been identified

For the purposes of drafting the master plan, the SWOT analysis was performed as a structured planning method for evaluating certain elements of the current situation and the future tourist development of Trebinje. It highlights four aspects of the analysed unit:

- **Strengths** – what one can rely on in terms of internal characteristics in achieving success. The key, most relevant and most intense forces are those that have the potential to turn into long-term sustainable competitive advantages;
- **Weaknesses** – internal characteristics that represent barriers to the success of the selected project, business activity or development direction. Weaknesses of minor importance or intensity can be overcome in the long run, but those important and intense ones strongly influence the basic strategic commitments and the rank of ambitions;
- **Opportunities** – external aspects that have a positive impact on the venture implementation speed and attractiveness, but generally have a limited impact on the very strategic commitments;
- **Threats** – external aspects which potentially can limit or bring additional risks to the venture.



The strengths and weaknesses of tourism sector are listed below

S

Strengths

- Proximity to recognized tourist destinations of Dubrovnik and Montenegrin coasts.
- Existence of attractive water resources (Trebišnjica river, Trebinje and Bileća lakes) and favourable climatic conditions throughout the whole year.
- High share of hotel accommodation in the total accommodation structure (according to the official data).
- Relatively favourable utilization of tourist traffic capacity in the season.
- Willingness to cooperate and agreement of all key participants in the destination tourism on the strong need for tourism development.
- Relatively high level of development of authentic eno-gastronomic offer based on domestic ingredients.
- Existence of strong participants from the private sector who are interested in developing and investing in the destination.
- Recognized potential of tourism for economic development by the public and private sector.

W

Weaknesses

- Lack of young, quality and professional staff in tourism and other activities.
- Low importance of tourism in the overall economy of Trebinje.
- Lack of a reliable system of control and supervision of tourist activities, especially in the field of accommodation.
- Non-heterogeneity of the tourist offer in all segments (accommodation, food and beverage, sightseeing tours, attractions, etc.) and outdated interpretation of the offer.
- Dependence on tourist traffic and capacity utilization of coastal destinations.
- Low price of tourism services (accommodation, food and beverage, etc.), which results in low revenues and consequently low salaries.
- High share of touring groups in the total tourist traffic of the destination.
- Lack of clearly defined and professionally developed projects for the improvement of tourist infrastructure and the tourist valorization of public property.
- Lack of a clear spatial plan, and customized tourist and recreational zones.
- Low level of destination management system model with a significant share of administrative expenditures.

Tourist sector opportunities and threats are given below

O Opportunities

- The existence of tourism demand large market in the nearby coast.
- Cross-border cooperation with leading tourist destinations.
- Stronger tourist valorization of cultural-historical and natural heritage and related attractions.
- Areas of nature suitable for tourist valorization in the context of active holiday products, but also other products.
- Designing a more efficient destination management model.
- Modern demand trends for authentic experiences which Trebinje already provides (eno-gastronomy, etc.).
- Better spatial planning and exploitation of the catering-tourist and recreational zones strong potential.
- Development of rural tourism through strengthening the experience of the destination rural environment .
- Exploiting the potentials of international funds for investment in tourism infrastructure.

T Threats

- Insufficiently protected use of the cultural-historical and natural resources of the destination.
- Age structure of the population.
- The global economic crisis and / or the slowdown in growth in key recognized markets.
- Unsuccessful counteraction to the growth of unregistered capacities of private accommodation, tourist traffic and illegal work in tourism.
- Rigid policy of natural resources conservation and impossibility of efficient spatial planning.
- Uneven inflow of funds from various funds for significant strategic projects for the development of tourist infrastructure and activation of attraction potential.

2.8. STRATEGIC CONCLUSIONS

Strategic conclusions of the state analysis (1/2)

- The development of tourism in Trebinje so far has occurred naturally as a result of extremely favourable geostrategic position in the hinterland of recognized tourist destinations, but also the existence of cultural and historical heritage (religious tourism), favourable climatic conditions, authentic gastronomy and affordable prices in relation to destinations in Croatia and Montenegro.
- The analysis of the accommodation structure and tourist traffic is significantly complicated due to absence of accommodation capacities control system, and an efficient way of guests registration and deregistration. Thus, the analysis conducted on the basis of officially available data showed an extremely competitive accommodation structure in Trebinje with a dominant share of hotel accommodation (64% of the total of 1.753 registered bed places). However, according to information from the field, the share of private accommodation is significantly higher than the official 12% and activities with the aim of capacity registration will be continued by the City and the Tourist Organization in the next period. On the other hand, the competitiveness of hotel accommodation is questionable given the very low realized price of accommodation and the dominance of capacity of the middle and lower level of service quality.
- According to the official data, in 2018, 60 thousand arrivals and 94 thousand of overnight stays were realized in Trebinje, which is a fourfold increase in the ten-year period since 2009. Considering the previously pointed out statistical shortcomings, the real tourist traffic was estimated through a conservative scenario, and the estimate of the real traffic is 210 thousand of overnight stays.
- The tourist traffic growth in the ten-year period was mainly due to the growth of foreign guests overnight stays. Currently, the utilization of tourist traffic capacity is moderate and favourable compared to the coastal destinations of Croatia and Montenegro. However, given that the impact of foreign guests on traffic growth occurs mainly during the summer, without strategic development of the year-round product, and with continued dependence on nearby tourist destinations, the tourist traffic deterioration is to be expected.
- In the context of product development in each developed destination, the creative tourism industry played an important role, i.e., destination management companies (DMC) and other participants in the private tourism sector involved in the tourist experience innovation. Trebinje does not have enough number of receptive tourist agencies that will create and commercialize experiences from Trebinje area, as well as rural households whose owners have recognized the potential of offer diversity and cooperation with agencies and other participants in the destination.
- However, the resources that Trebinje has have not been fully used until today. This is supported by the fact that this destination is mainly visited by tour groups which usually stay just overnight due to more affordable prices compared to nearby destinations. In general, the products demand structure shows that the product offer is poor and that rural tourism plays a minor role in this destination.

Strategic conclusions of the state analysis (2/2)

- It should be emphasized that eno-gastronomy, based on authenticity and domestic products, stands out as one of the key potentials for the further expansion of Trebinje offer. Successful business initiatives so far are mainly related to the area autochthony exploitation of the and quality wines on the basis of which are arranged wineries that provide an experience at a significantly higher level of quality compared to the rest of the destination.
- Analysing the tourist value chain, several necessary infrastructural investments, that will improve the competitiveness of the Trebinje tourist product, were revealed. Also, other challenges that need to be addressed by a strategic turn at the national and federal level have been noticed- (improvement of expertise and education system for the tourist profession, development of transport infrastructure, etc.). However, one of the key ones is the obsolescence or lack of interpretation of existing attractions, and the tourist valorization of hitherto inactivated tourist resources.
- Trebinje has numerous tourist resources and in the next period the overall tourist offer must be improved through their valorization. However, the number of detailed and market-tested projects (prefeasibility study/ feasibility study, etc.) is low and current project ideas should be turned into clearly defined and documented projects in the following period, which will be attractive in the investment market.
- The tourist organization depends on City funding (about 50% of the budget of a total of BAM 403 thousand in 2018) and, after excluding the inevitable administrative costs from the analysis, the largest funds are invested in the events organization and co-financing. Also, in the period after 2018, the share of investments in fairs increased significantly. Speaking of the organizational structure, expected growth and tourism development, in the next period further strengthening of the TO Trebinje, through reorganization and systematization of jobs as well as defining of new operational processes, is recommended .
- According to marketing, the Tourist Organization activities are visible in the field of raising the online destination visibility through various channels on social networks and the web, but mainly (in financial terms) through fairs. Regarding the management of online channels, the following was determined by analysis: the focus of the content on local topics, informing of the followers about activities and achievements, as well as the lack of tourist content for the international market (in Latin and English). Participation in fairs can be a strong channel for cooperation with various participants in the tourism industry.
- It should be noted that Trebinje is recognized by internationally recognized tourist magazines and guides. The example is an article published in the Telegraph and the tourist guide In Your Pocket.



3 Strategic framework

3.1. STRATEGIC CONTEXT AND TOURISM DEVELOPMENT GROUNDS

Strategic context of tourism development (1/2)

Strategic location and proximity to globally recognized destinations (Dubrovnik and Kotor-UNESCO heritage)



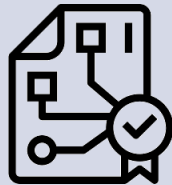
Trebinje is located in an extremely favourable geographical location, in the triangle of tourist destinations that are recognized globally. In this context, Trebinje has already (in a certain part) started to use its favourable position, which is most visible in the numerous initiatives of tourism sector and the development of tourist facilities. The fact that Trebinje is located in the hinterland of the northern Montenegrin and Dubrovnik coasts is generally positive and provides an opportunity to develop a destination according to a model that has occurred in a number of similar destinations (e.g. the French Riviera, Costa Brava, Istria, etc.). Such a model implies the development of authentic experiences on resources that are not available in the coastal zone, and global trends indicate significant advantages of destinations in the hinterland (peaceful environment, diverse experiences, quality-price ratio, richness of space, etc.).

Tourism in Trebinje can be briefly described as a transit considering the low average length of stay so far, the number of daily visitors during the main season and general offer development based on short-term guests visits. Although this type of tourism has its positive economic impacts and will certainly remain one of the fundamental forms in the future, in the long run transit tourism in Trebinje needs to expand its tourist offer and change its focus towards stationary tourism. Positive examples of the developed offer are based on eno-gastronomy, agriculture, domestic products, but also active vacation. Further competitiveness development in this direction should be supported.

The development so far has been based on transit tourism



Strong potential for the development of new projects and products has been recognized



Local authorities have a number of public infrastructural projects at their disposal, some of which are already under implementation (e.g. the project in the Old Town, the Spiritual Centre Mrkonjići, the bypass, etc.). In this context, it is necessary to emphasize the fact that Trebinje stands out for its strong potential for the development of new projects and products, both in tourism and in other industries. Also, at the local level, there are numerous project ideas that await further development and implementation by private investors, with the active participation of local government through space, necessary infrastructure provision, etc.

Strategic context of tourism development (2/2)

Lack of an optimal legal framework for tourist activities



In B&H at the state, i.e. in the RS at the entity level, there is a lack of optimally developed and adjusted tourist legal framework which will, among other things, prescribe the model of destination management and define effective tools for supervision, measurement and control of tourist activities. In the absence of quality legislation, controlled and planned development of tourism into a higher value-added activity is not to be expected. On the other hand, the existing legal framework is not harmonized between the entities, which in the context of Trebinje, that is located near another entity, creates different market conditions for different participants. The non-existence of an optimal legal framework also results in: an unclear role and responsibilities of tourist organizations, lack of accurate data on tourist offer and demand, high share of illegal and undeclared work and consequently the unclear picture of the tourist offer current state and tourist products of low experience quality.

Tourist traffic in the area of Trebinje has recorded a strong growth in the last 10 years and the growing trend is recognized by the private tourism sector. But according to the economy revenue from tourism and the number of employees, tourism is still not a significant component of the local economy, so the primary focus is on energy. Also, according to the findings from the field, incomes in tourist activities are not competitive with those in Dubrovnik and Montenegro. However, due to substantial development potential, a strong growth of tourist traffic and tourism is expected in the following period, which is of huge importance for the economy.



Tourism is still not an economically significant activity at the local level

The destination shows the need to improve the mutual participants communication



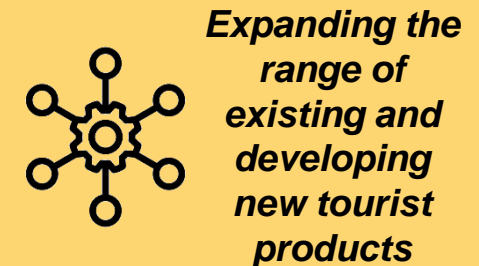
As a destination at the very beginning of organized development, Trebinje needs a high level of coordination of all participants activities involved in tourism activities, from the public, private and civil sectors. According to the findings from the field, the participants are extremely interested in the development of cooperation and in the coming period it is necessary to increase the role of the private and civil sector in development initiative. Some of the key principles of cooperation must be planned cooperation activities, clear and constructive articulation of the requirements of all parties involved, all with the aim of achieving a synergistic effect.

Strategic grounds of Trebinje tourism development

The key grounds of Trebinje further development represent the character and ambience of the destination in which the motives of the Mediterranean and the continental hinterland of the tourist-recognized coastal belt merged, while retaining autochthony and uniqueness. Such ambience is visible in contact with hosts and the original Herzegovinian hospitality, but also in tradition, local culture, specific architecture with preserved historical heritage and eno-gastronomy. The rural area, which includes agriculture, rural households, wineries and similar components which has not yet been valorized for tourism, and in the coming period will be a strong foundation of this destination tourist offer development. The selected vision of the overall development speaks in favour of the quality of life in this destination: Trebinje 2030 - The most desirable small town in the Western Balkans



Expanding the existing tourist experiences as well as designing new experiences are necessary to motivate guests for a longer stay and consumption of more tourist experiences, increase in consumption, all in order to move away from transit tourism. Based on high quality resources, a development focus should be on experience, not only in the context of the accommodation, food and beverage components, but also in the other components of tourism value chain. In this context, the key possibility of progress is visible in the innovative interpretation of destination resources (e.g. culture, eno-gastronomy), but also the spatial expansion of experiences through the development of active holiday products in the untouched nature surrounding Trebinje.



Further development of tourism within this destination will find its foothold in the synergy of local authorities, the Tourist Organization, and participants from the private and civil sector whose activities are related to tourism. Through the achieved cooperation, the public sector will have much easier access to information on key aggravating factors of development and much more efficient assistance in their elimination. In addition to encouraging an inclusive model of tourist product development, the destination management system has the task of modernizing the approach to marketing and actively working to improve the interpretation of tourist resources.



3.2. TOURIST VISION, MISSION AND POSITIONING

Tourist vision

Trebinje is a destination of a rural Mediterranean way of life and an exciting offer of active holiday.

Trebinje 2030: the most desirable small town in the Western Balkans. *

...of a rural Mediterranean way of life ...

Trebinje is a part of the Mediterranean area, globally recognized as a synonym for the comfort of life whose foundations are found in a pleasant climate, heterogeneous relief, rich eno- and gastronomic offer and the general privilege of enjoying the relaxed lifestyle - the Mediterranean lifestyle.

Rural character of the destination - agricultural products, local cuisine, quality wines, rural households, indigenous culture, etc. are key components of the further development of Trebinje tourist offer, on the basis of which the goal is to develop high quality tourist experiences for a wide range of market segment demands.

The urban spatial unit of Trebinje will play a key role in further development as a centre of tourist experiences and the stage on which the authentic heritage of Trebinje and the culture of living will be presented.

...of an exciting offer of active holiday ...

Exciting experiences in an attractive natural environment, through a series of developed activities, will present “the other face” of Trebinje for participants who the motive for their travels are looking for in the dynamic side of the destination and are ready for challenges in nature.

Natural resources provide the possibility of developing a series of activities. Because of that the focus should be on a wide range of more demanding and less demanding experiences suitable for various age groups, specialized recreational groups, individual guests, etc.

The mission sets the key principles and principles of operationalization of the defined tourism vision



Participants who manage the Trebinje tourism development will achieve a **higher level of activities coordination** in all management areas, starting with branding, marketing activities and product development..

Given the prominent expanding challenge and increase of the tourist product diversity, participants in the tourist sector will put focus on the development of **new market-attractive tourist activities and experiences** for selected market segments in the coming period.



Trebinje will encourage the development of **tourist experiences and high level of quality experiences** in all components of the tourist value chain, and actively work on the legalization of business activities of the tourist sector participants, primarily in the accommodation industry.

Trebinje will approach **the valorization of hitherto unused resources and interpret them in an innovative and modern way**, i.e., develop the tourist destination chain segments, that currently are not at the level of the offer rest, **to** globally competitive level.



Through all development activities, **the principle of sustainability** will be applied with the aim of preserving the natural environment and improving the local population quality of life and use such approach as part of positioning and raising tourist attractiveness in line with the trends..

Tourist positioning

Trebinje is a destination of high level of quality of rural and active holiday and an extraordinary price/quality ratio .

As part of the tourist-experiential unit of the Dubrovnik and Montenegrin coast, Trebinje offers its visitors a unique combination of eno-gastronomy, Herzegovinian hospitality, authentic tradition and culture, and a diverse landscape

Basis of tourist positioning

a destination of high level of quality of rural and active holiday and an extraordinary price/quality ratio

Trebinje has the opportunity to develop experiences of high quality in all segments of the tourist offer, primarily in the context of rural tourism, eno- and gastronomic offer and active holiday, based on the high quality of resources at its disposal. However, it will be crucial in quality development to maintain affordability, which is one of the main competitive advantages compared to more developed tourist destinations in the coastal area.

The geostrategic location is one of the keys of tourist offer development so far, and in the future the amount of tourist traffic in these destinations will represent the main demand market of Trebinje. However, in the coming period it will be extremely important to use the proximity to recognized tourist destinations in the coastal area, to develop the long-term most profitable tourist offer, and to achieve a shift from transit tourism.

...part of the tourist-experiential whole of the Dubrovnik and Montenegrin coast ...

... enogastronomy, Herzegovinian hospitality ...

The homely atmosphere and pronounced hospitality is visible in the destination at all times, which, along with quality agricultural production and staff expertise, is a prerequisite for the development of a quality eno-gastronomic scene. Trebinje caterers will, based on already existing examples of good practice in the food and beverage segment, develop and differentiate their own offer and thus respond to the market needs for innovation and quality.

In the area of Trebinje, various cultures have left their mark throughout history, which makes the cultural heritage and tradition of the destination extremely rich. This is reflected in the religious and architectural component in the old town and its surroundings, and in the rich intangible heritage.

... authentic traditions and cultures...

... diverse landscape...

Mountainous areas, lakes and rivers, lowlands and fields in Trebinje area make a perfect backdrop for the development of a number of tourist experiences.

Although currently underutilized, natural resources represent a key potential of diverse tourist offer and an opportunity for different tourist positioning compared to the competitive destination set at the regional level.

3.3. TOURIST PRODUCTS AND TOURIST EXPERIENCE ZONES

Primary and secondary tourist products are defined on the basis of findings analysis and according to the destination participant attitudes

PRIMARY TOURIST PRODUCTS

RURAL TOURISM



TOURIST TOURS



ACTIVE HOLIDAY



SECONDARY TOURIST PRODUCTS

CULTURE



ENO-GASTRONOMY



SPORT



BUSINESS TOURISM



Rural tourism

Description of a product

Rural tourism is a type of tourism which takes place in rural areas and is based on natural resources, heritage and a way of life, as well as rural activities. Rural tourism is experientially oriented. It is carried out mainly in less populated places and in the natural environment, and its goal is to preserve culture, heritage and tradition and raise the quality of life of the local population. Rural tourism has several forms:

- Agritourism - means the stay of guests on a farm and observation or participation in traditional agricultural activities,
- Active rural tourism - means the use of rural areas for various forms of sports and recreational activities,
- Eco-tourism - “responsible” tourism that supports the protection of natural resources as well as maintaining the quality of life of the local population,
- Cultural rural tourism - is related to the culture, history, archaeology and other determinants of a rural area.

Rural tourists are mostly highly educated guests, who often travel and belong to the segment of higher purchasing power and spend an average € 80 per day, out of which 65% refers to accommodation and food. Around 7% of the total world travel is motivated by wine, gastronomy and rural experience. An average annual travel growth between 3% and 4% is expected.

The rural area of Trebinje represents the optimal environment for this product development and a way of presenting indigenous gastronomy that does not individually have a sufficient level of sophistication to position the destination as eno-gastronomic in the demanding tourist market.

Target markets

Primary:

The Netherlands, Belgium, Scandinavian countries, DACH*

Secondary:

The Netherlands, Belgium, Scandinavian countries, DACH*

Production segments

Rural eno-gastronomic offer
Village events (local events, traditional music and etc.)
Village activities (horseback riding, fishing, hiking and etc.)

Market segments

Families with children
Older couples without children
Younger couples without children

Period of time

Year-round product



Rural tourism

Key existing elements

- Rural households with and without tasting (with the precondition of further qualitative offer development and number of facilities)
- Wineries and wine routes
- Indigenous offer in food and beverage facilities (with significant space for progress)
- Ethno capacities within the City of Sun
- Herzeg House
- Honey producers with the possibility of receiving guests
- Medicinal herbs and Herzegovinian honey
- Religious buildings and cultural and historical monuments in urban and rural areas

Key necessary elements

- Innovative interpretation of rural heritage, tradition and attractions through quality interpretation centres
- Rural accommodation facilities: ethno-resort, agritourism, rural households, rural holiday homes, bed and breakfasts, family hotels, etc.
- Authentic ethno-villages
- Authentic offer of rural production
- Gastronomic routes and further content development on wine routes
- Tasting places
- Petting zoo

Product goals

- 1 Tourist valorization of rural areas
- 2 Improving life quality of the local population
- 3 Positioning the destination in the tourist market through product development which is in global demand growth
- 4 Encouraging the environmental sustainability of the destination
- 5 Sustainability of micro, small and medium enterprises engaged in tourism and agriculture
- 6 Emphasizing the authenticity of the destination

Key success factors

- 1 Preserved nature and rural landscape
- 2 Authentic eno-gastronomy and branded indigenous products
- 3 Existence of specialized destination management companies and formed tourist thematic packages
- 4 Developed offer of rural accommodation at a high and luxurious level of quality
- 5 Quality infrastructure and professional interpreters of the offer (hosts, guides, etc.)

Tourist tours

Description of a product

Tourist tours are a type of tourism that involves individual or group organized movement in a certain space with the aim of discovering and getting to know the specific sights of a destination. They can include pre-defined thematic routes related to the specificities of the destination such as culture, natural attractions, gastronomy, wine, etc. Tourist tours appear as a tourist product in two basic forms:

- Individual tours- Travelers form their own itinerary, which includes a tour of the most interesting points in a destination, and takes place by individual means of transport. Individual tours include sightseeing tours if visitors do not spend the night;
- Group tours- Travelers through organized tours, usually defined by tour operators or travel agencies, explore and get to know new places in groups that have similar interests.

Tourist tours make up almost a fifth of the European holiday market, and there is a steady increase in demand for this form of travel globally. Precisely such trends have led to the growth of the attractiveness of Trebinje in the continental and global tourist market, where demand is constantly discovering new destinations and travelling outside the usual routes.

One of the key preconditions for strong demand growth in Trebinje is affordability, and in the upcoming period, primarily for long-term sustainability and quality of the tourist product, the focus should be on diversifying and improving the competitiveness of all tourist value chain components.

Target markets

Primary:

Turkey, Spain, France, Greece, Russia, Dubrovnik and the North Coast of Montenegro, Far East

Secondary:

Serbia and B&H

Product segments

Sightseeing of cultural and natural sights
Product tasting
Visit to souvenir shops

Market segments

Older couples without children
Golden oldies
School groups
Youth groups and young couples without children (individual tours)

Period of time

In the period from April to October



Tourist tours

Key existing elements

- Rich cultural heritage
- Suitable but uniform accommodation capacities
- Natural attractions (e.g. Trebišnjica, Vjetrenica)
- Favourable catering offer
- Herzeg House
- Vicinity of the developed tourist destinations

Key necessary elements

- Quality traffic infrastructure and good connections
- Quality and diverse forms of accommodation
- Defined and marked tourist routes
- Availability of information online and in the destination (presentation of attractions and resources through itineraries)
- Interpretation centres – interesting and educational component (edutainment)
- Tasting places

Product goals

- 1 Great financial benefit for participants in the destination tourist sector according to the model of economies of scale
- 2 Occupancy rate of accommodation capacities
- 3 Raising the visibility of experiences and activities within the destination
- 4 Developing the tourist value chain in the initial phase of destination development

Key success factors

- 1 Innovative interpretation of the destination tourist resources
- 2 Developed sales channels (DMC, specialized agencies, etc.)
- 3 Developed visitor flow management system
- 4 Avoidance of the impact of over-tourism and successful dispersion of demand to different points of interest
- 5 Customized catering offer in the destination (simpler services at lower prices)

Active outdoor tourism

Description of a product

The term active holiday-adventure, active outdoor tourism means a tourist product that includes at least two of three components: physical activity or recreation, natural environment and cultural exchange.

Active holiday can be divided into two basic forms according to the intensity of activity:

- Adrenaline or adventure (hard) sports and activities (mountain biking, paragliding, kayaking, canoeing, etc.)
- Recreational (soft) sports and activities (walking, hiking, cycling, horseback riding, etc.)

There are three main consumer segments of this product:

- the consumer segment who chooses the destination which he/she visits exclusively for active holiday and activities available within the destination,
- recreationists for whom active holiday is not the only motive to visit the destination and consume other tourist products during their stay,
- professional athletes and sports groups (clubs, associations, etc.) who go on a trip motivated by preparations, fitness training or sports competitions.

The key precondition for the development of active holiday is a variety of attractive natural resources adapted to the needs of consumers and, in the context of the segment of professional athletes, developed support infrastructure and connection of the destination. Climatic conditions are not necessarily a limitation or an advantage given the various preferences of a particular group of consumers and the need for different levels of activity complexity.

Target market

Primary: Netherland, Belgium, Scandinavian countries

Secondary: B&H, Slovenia, Serbia, Montenegro, Croatia

Production segments

Sports activities
Recreational activities
Adrenaline sports
Sports and recreational events and manifestations

Market segments

Youth groups
Families with children
Younger couples without children
Athletes and sports groups

Period of time

Year-round product



Active outdoor tourism

Key existing elements

- Hiking and cycling trails
- Paragliding platform
- Promenades along the Trebišnjica river
- Possibility for quad bike rent in the area of Zubci and Bijela gora
- Capacities in the City of Sun
- Boats and kayaking on the Trebišnjica river
- Already marked hiking trails (with significant space for progress)
- “Via Dinarica” trail includes the area of Trebinje

Key necessary elements

- Sports-recreational trails and routes with developed interpretation
- Sports-recreational, entertainment and adrenaline centres
- Zipline systems
- Forest trails and roads signage
- Adequate accommodation facilities for active tourists
- Specialized shops and services for bicycles and other equipment
- Arranged lookouts, rest areas, picnic areas
- Schools offering training for certain sports (e.g. cycling, orienteering, water sports) and certificates
- Quality and professionally organized outdoor events

Products goals

- 1 Reducing the impact of seasonal tourist traffic
- 2 Valorizing the destination parts that have not been recognized by tourists until now
- 3 Encouraging the destination environmental sustainability
- 4 Relieving critical tourist spots within the destination
- 5 Creating new jobs in sports activities
- 6 Market positioning as a destination which has developed a value-added product

Key success factors

- 1 Quality infrastructure for active holiday with implemented safety measures
- 2 Valorized natural resources
- 3 Developed sales channels (DMC, specialized travel agencies, etc.)
- 4 Targeted marketing activities through specialized channels
- 5 Specialized guides and activity managers

Secondary tourist products (1/2)

Culture



Cultural tourism involves travel of tourists outside their place of residence, motivated by interest in culture and improving their knowledge of history, art, heritage, architecture, customs, religion and lifestyle of the population in a destination, and participation in cultural events and performances.

Cultural tourism tourists can be divided into:

- tourists who predominantly travel with the motive of experiencing the entire cultural offer of the destination or a specific part of that offer,
- tourists whose travel is not primarily motivated by culture, but they consume cultural contents to a greater or lesser degree.

In the case of Trebinje, for the purposes of this document, cultural tourism also includes religious tourism, i.e., pilgrimages that can in their manifestations be identified with tourist tours. Culture, as a tourist product of Trebinje, is important on the regional market and its attractiveness is based on the diversity of tangible and intangible heritage.

Eno-gastronomy



Eno-gastronomic tourism includes visits to destinations whose primary goal is to satisfy the personal motives of visitors to discover the specific features of local eno-gastronomy. The specificities of eno-gastronomy are shaped by various influences of climate (climate, flora, fauna) as well as culture, tradition, religion, etc., which makes eno-gastronomy part of the identity of the local community. Eno-gastronomic destinations that build their image on quality food and drink, primarily motivate guests to visit because of enjoying the authentic eno-gastronomic offer. Eno-gastronomic tourism has a positive impact on the agriculture development through the connection of local producers with distribution centres and catering facilities, which is primarily visible in rural areas. The high-quality eno-gastronomic product of Trebinje will represent only a part of the total offer and is therefore a priority as a secondary product in favour of rural tourism, whose attractiveness on the tourist market will be largely based on eno-gastronomy of Trebinje and its surroundings.

Secondary tourist products (2/2)

Sport



Sport as a tourist product includes preparations of professional teams in this destination, as well as the organization of events - camps, competitions at various levels, and etc. Sport can have significant positive effects on the quality of business of local participants in the tourist sector as preparations take place in different parts of the year and therefore have the potential to fill capacity in the winter. For the development of sport as a tourist product, the destination must have a developed infrastructure, as well as a market position through which it manages to rival other destinations in attracting sports teams. From the perspective of Trebinje, it is necessary to point out that the destination has a tradition of receiving sports teams in the preparations and has a significant part of the necessary infrastructure. In the following period, at the destination level, it is necessary to reach a consensus of participants on the need for product development and begin to attract customers through coordinated activities.

Source: Horwath HTL, 2020

* MICE –“Meetings, Incentives, Congresses, Events“

Business tourism



Business tourism in Trebinje is a consequence of the existence of the headquarters of various important companies at the national and international level - primarily *Hydro Power Plant on the Trebišnjica River*, *Power Utility of the Republic of Srpska* and *Swisslion*. Given that there are no significant opportunities for congress tourism development (MICE *) with all components due to the resource base of the destination, but also the proximity of Dubrovnik, the idea of further product development is the orientation to the business component (incentive). On the other hand, with the existence of current companies and the opening of new ones, in the sense of tourism, it is necessary to provide capacities for smaller meetings and gatherings of company workers. For the development of business tourism, it is crucial to form an attractive tourist experience package and to appear in the market and offer companies from B&H, Montenegro, Croatia and Serbia. In addition to the indispensable component of eno-gastronomy, the focus of the experience development should be placed on activities in nature, construction of adrenaline and amusement parks, etc. and with a favourable price-quality ratio promote a competitive tourist product in the regional market.

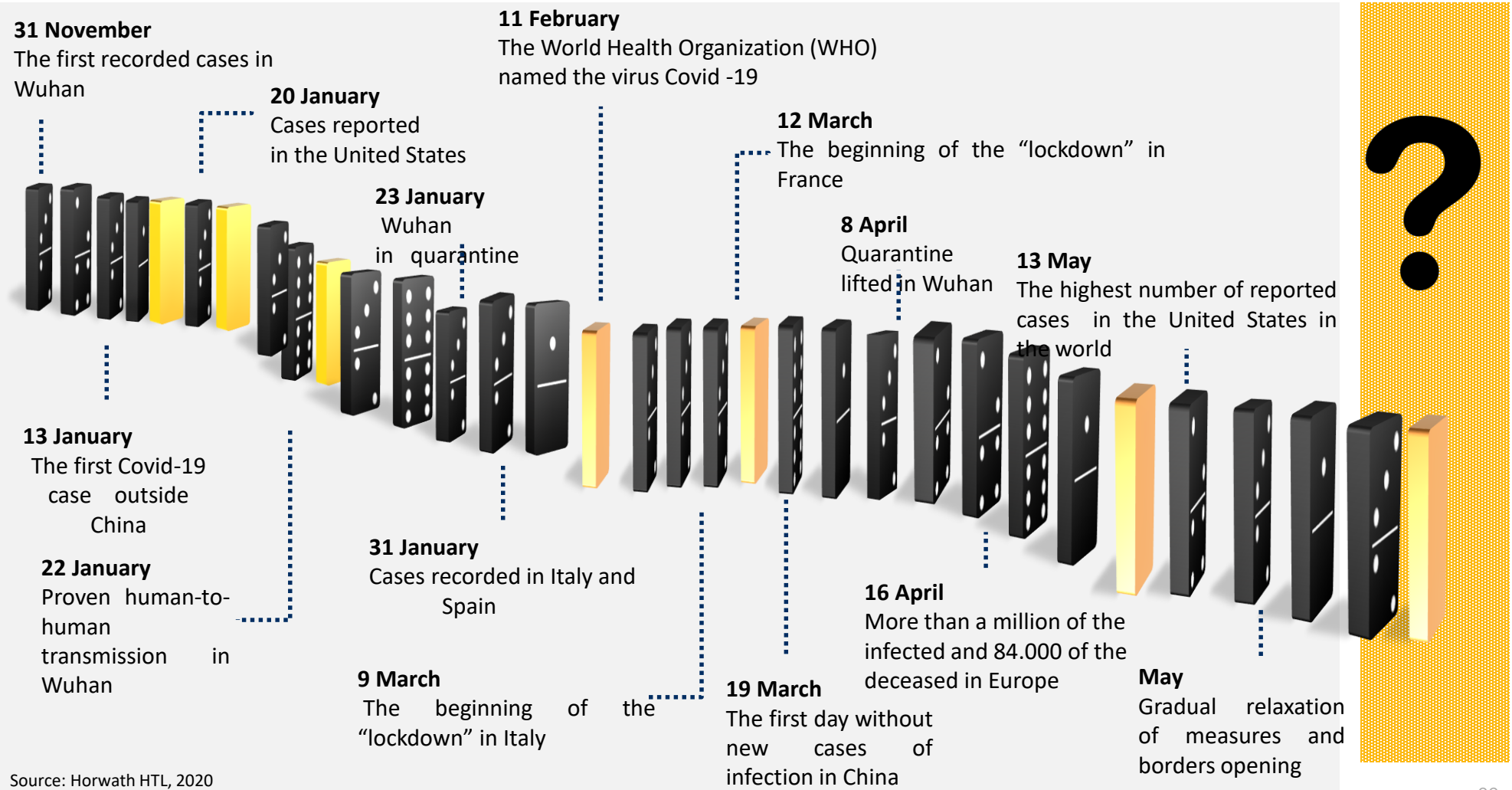
Tourist experience zones, in which the delivery of major tourist products and experiences take place, have been defined

Tourist experience zones are defined through the connection of tourist products and related experiences and specific localities where they will take place. The mentioned methodology could not be applied to sports and business tourism due to the characteristics of the products themselves, i.e. spatial dispersions of the same.

PRODUCTS	SPATIAL COVERAGE	SPACE CHARACTERISTICS	EXPERIENCE SCENARIO	LEITMOTIV
Rural tourism	Rural surroundings of Trebinje, villages and hamlets, orchards and fields, vineyards	Renovated villages and antique houses, developed agriculture at every step, rural households	Authenticity of the local culture and hospitality of the local population, local cuisine, domestic animals, stay in ethno-resorts and rural holiday homes	<i>The wealth of the rural Mediterranean</i>
Tourist tours	The centre of Trebinje (Old Town, Liberty Square-Platani, etc.), Museum, Tvrdoš Monastery, Gračanica, wineries	Clearly highlighted tourist points of interest, arranged visitor management system, catering facilities, crafts	Getting to know local and regional history in an innovative and fun way, tasting local products	<i>Trebinje for the whole year</i>
Active holiday	Mountain areas (Orjen, Zubačka Ubla, etc.), river Trebišnjica and tributaries, lakes, City of Sun	Developed systems of bicycle and hiking trails, arranged infrastructure for kayaking, amusement and adrenaline parks, winter recreational activities, etc.	Range of activities available from a pleasant walk and kayak ride down the Trebišnjica, all the way to a demanding and dynamic experience of the mountains, socializing with family and friends in a healthy environment	<i>An exciting escape into nature</i>
Culture	Old town, Museum, monasteries, bridges, fortresses, towers, Mičevac, old town Klobuk	Preserved, arranged and innovatively interpreted historical sites, open religious sights with designed contents	Modernly interpreted local tradition in a regional context and true respect for religious differences	<i>History, tradition and local culture at every turn</i>
Eno-gastronomy	Microlocations - top restaurants and wineries	Catering facilities at the international level of quality	Local culinary heritage interpreted in a modern way, <i>slow food</i> approach and top service	<i>Essence of Trebinje</i>

3.4. GROWTH GOALS

Covid-19 crisis will significantly affect global tourist trends in the coming period, however, recovery trends are in sight



Source: Horwath HTL, 2020

Covid-19 has significantly affected the world economy so far, the tourist sector is one of the most affected

Decline in stock value, e.g. *FTSE Dow Jones*, *Nikkei* recorded the strongest drop in value since 1987.

Investment categories that were considered the safest investments until this crisis recorded a sharp decline in value (e.g. gold, silver, etc.) On the other hand, oil prices have been at their lowest level since the 2001 crisis.

Due to global demand trends and stronger barriers in the cross-border movement of goods, there is a slow down of the industrial production.

The Organization European Economic Cooperation (OECD) has issued the first correction of expected growth rates of key world economies where a trend of significant decline is evident. Thus, the expected global economic growth rate for 2020 is forecast at just over 2%, while all economies of the countries are forecast with lower growth rates than those in 2019.

Consumption reduction is visible in almost all sectors of the economy, especially in the sector of catering, accommodation services, and trade, except grocery trade, drugstores, pharmacies and similar stores.

Since China accounts for a third of global industrial production and is the world's largest goods exporter, the decline in industrial production in the first two months in the amount of 13,5% has multiplying effects globally and is an indicator of the global slowdown in the world economy.

Air transport is one of the most affected industries with an expected slower recovery in the number of passengers compared to global GDP, and its recovery is not expected until 2023. Until June 30, as many as 4,5 million flights have been cancelled globally, and in 2020 55% less revenue is expected compared to 2019.

Reservations at the level of the entire hotel industry and other accommodation facilities record an unprecedented decline. Hotel occupancy rates rarely exceed 10%. Most European destinations record a drop in revenue per room between 30% and 80%, while online accommodation booking platforms will lose about \$ 11,5 billion.

The food and beverage segment has lost more than 70% of its turnover in the past period globally. 60% of all unemployed people in the United States come from the food and beverage industry.

The impact of the Covid-19 on tourist movements will be strongest in the short term, gradual recovery is expected after the borders opening

PERIOD OF UNCERTAINTY

The impact of the crisis caused by the Covid-19 is visible on the global and local level. Trebinje is no exception in economic and tourist terms. Losses are inevitable, and the full impact of the crisis is currently almost impossible to estimate, except for a certain drop in turnover in 2020. The reasons that make the estimates unfounded are mostly reflected in the uncertainty of events in the upcoming period and the key fact that resolving the health crisis will precede the beginning of economic recovery. In this context, the deadline within which the scientific community will create a vaccine is especially important. If the vaccine is available already in the fall of 2020, the return of tourist traffic during 2021 to almost equal levels before the crisis is expected. However, if the vaccine is not available by the fall of 2021, and in the meantime a second wave of pandemics occurs, much stronger impact of the crisis on global economic and tourism trends and the recovery of tourism is not expected until 2022.

REASONS FOR OPTIMISM

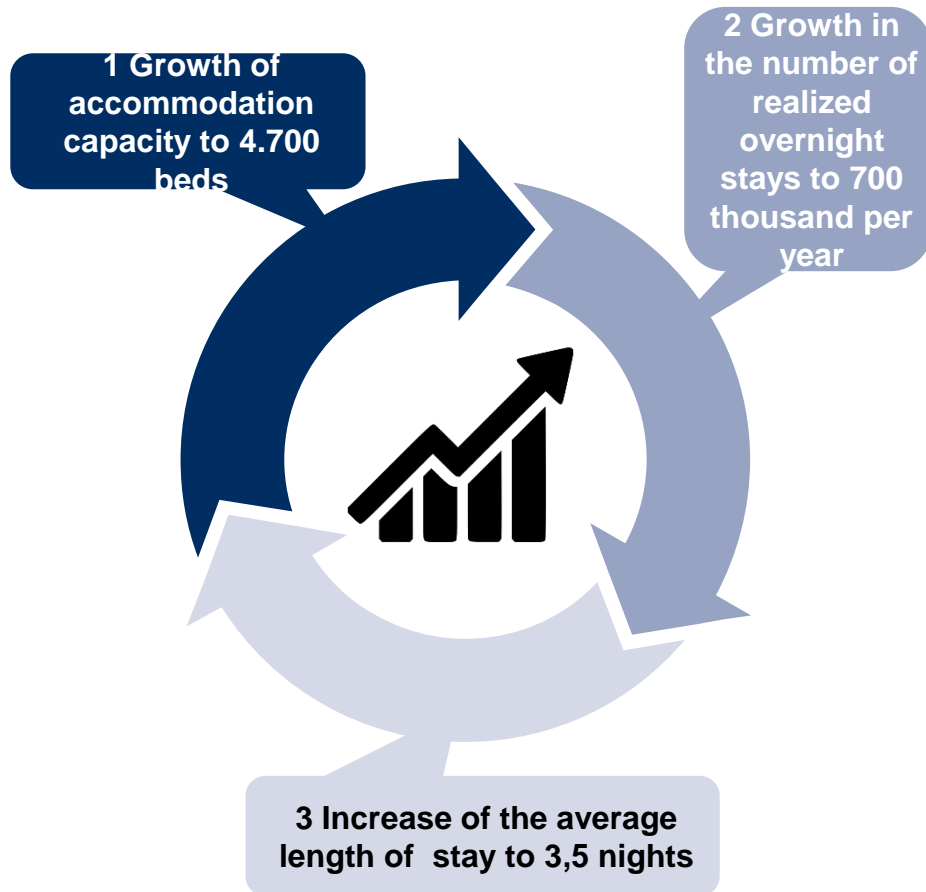
However, there are some reasons for optimism on which participants in the Trebinje tourism sector should base their business plans in the short and medium term. Trebinje realizes a significant part of tourist traffic on the basis of guests who come to the destination by their own means of transport “drive-in”. Therefore, it is possible to conclude that it has an advantage over destinations that are highly dependent on air traffic or guests travelling on cruise ships (e.g. Dubrovnik). The mentioned market is mostly domestic and regional, so at the time of writing the Strategy, the opening of borders has already been done or is expected in the short term (depending on the country).

THE ROLE OF THE TOURISM DEVELOPMENT STRATEGY OF THE CITY OF TREBINJE IN THE COMING CRISIS

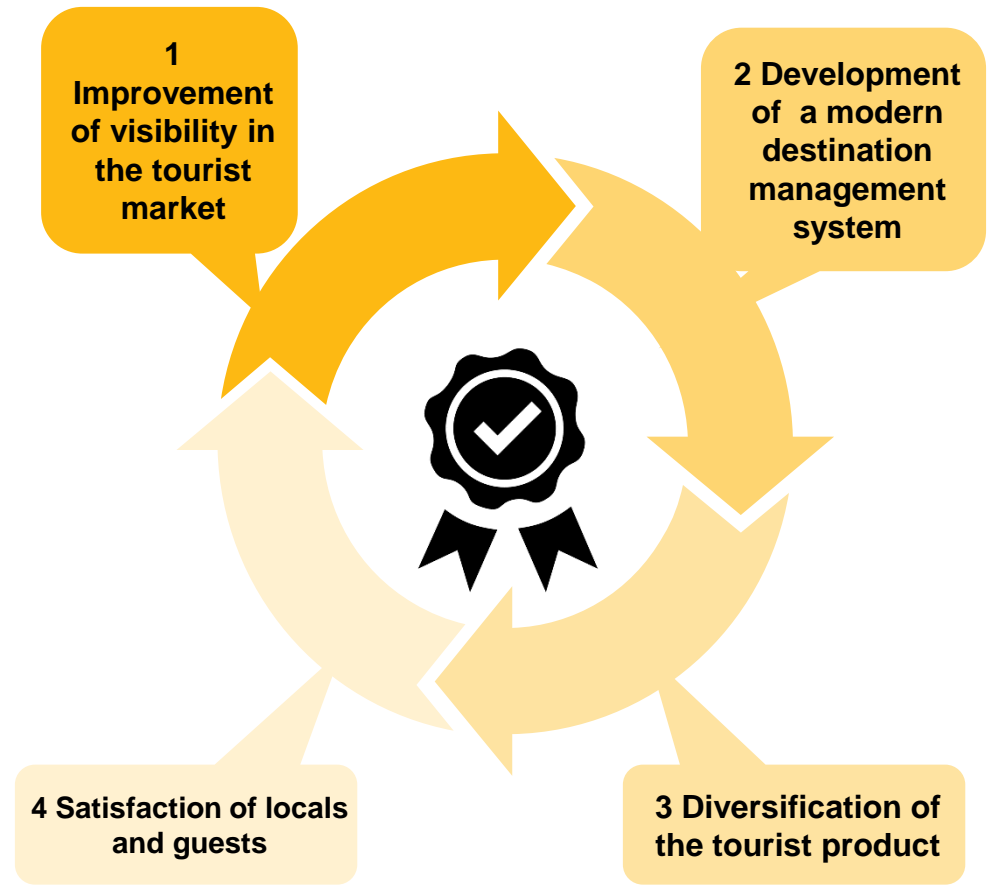
It is certain that the crisis will affect the dynamics of goals achieving and implementation of certain activities envisaged by this Strategy, and in this context it is necessary to adjust the action plans to external and internal change of circumstances. The first example is the growth goals defined in this chapter, and then the initiatives envisaged by the operational development strategies in the next chapter. The growth goals are defined for a ten-year period and are based on trends in the previous period, information from the field, and the expert opinion of Horwath HTL. As the expected duration of the crisis is significantly shorter (depending on the happenings described in the part “period of uncertainty”), the position of Horwath HTL is that the goals can still be achieved according to projected scenarios (due to accelerated demand growth after the economic recovery phase). Furthermore, given that Trebinje is a destination at the very beginning of the strategically planned development of the tourist product, the crisis will not affect the need to implement all defined operational development strategies and planned activities. Based on the above, the recommendation is to implement the guidelines set by the Strategy in accordance with the possibilities, available budgets over years and the full projected coverage.

A total of seven long-term goals of tourism growth have been defined, whereof three are quantitative and four are qualitative

Quantitative growth targets



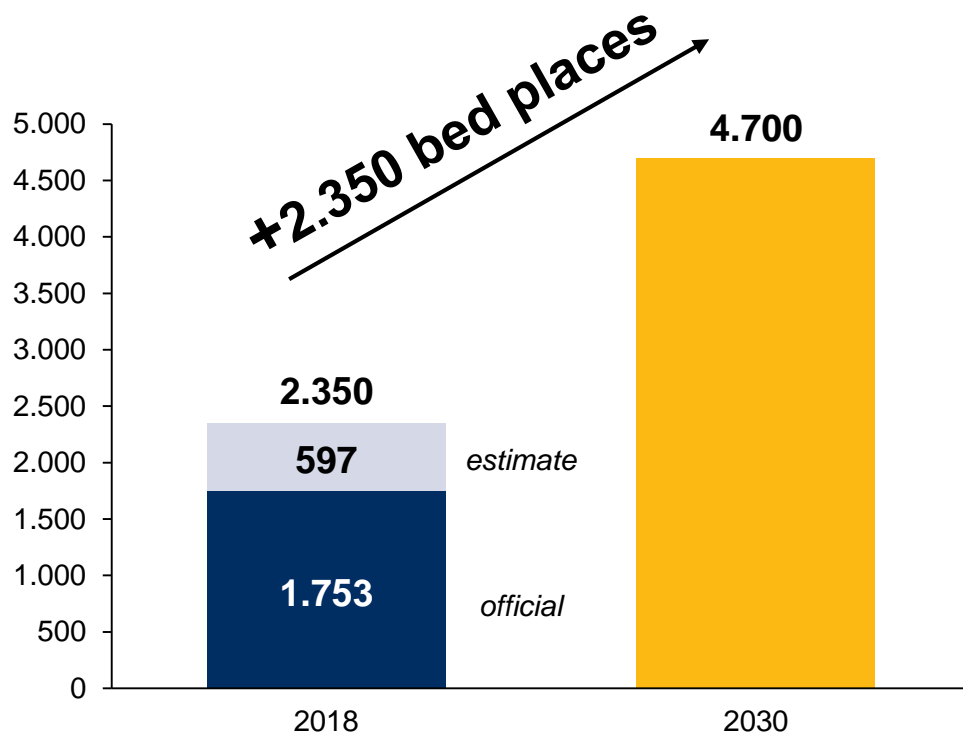
Qualitative growth goals



A total of seven long-term goals of tourism growth have been defined, whereof three are quantitative and four qualitative

1

Growth of accommodation capacity to 4.700



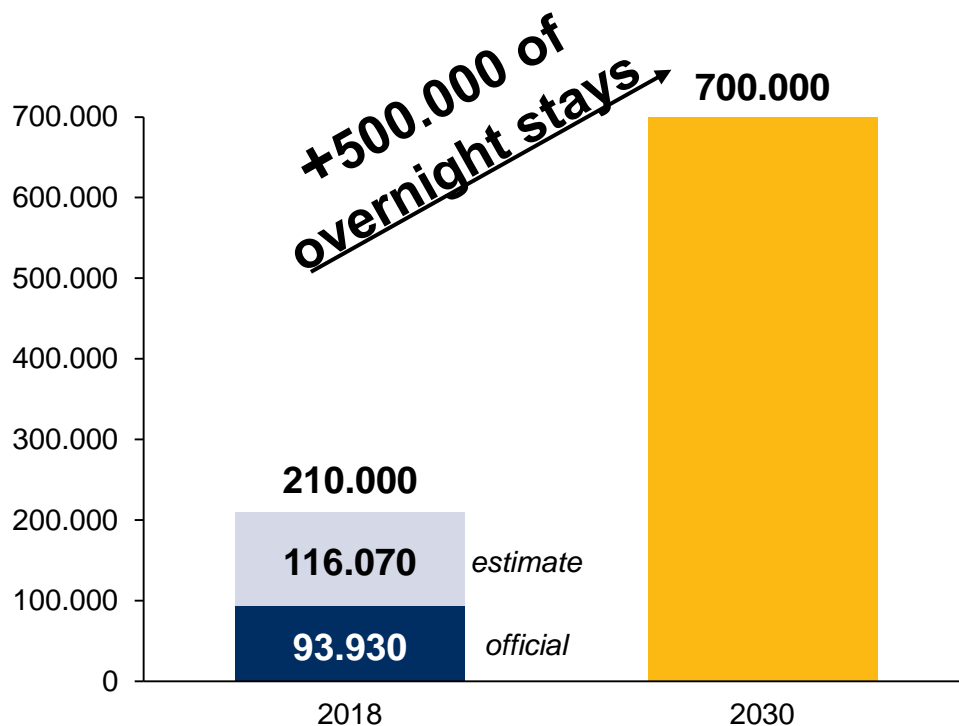
The estimate of accommodation capacities growth is based on the following preconditions:

- The official capacity statistics underestimates the current number of bed places. Implementing the legalization activities and registration of the existing bed places, capacity will increase significantly in the next period. Estimates from the field indicate that the number of bed places in private accommodation is 3 to 4 times higher, i.e. between 400 and 600 unregistered bed places.
- Accommodation capacities in the period from 2014 to 2018 grew at an annual rate of 13,3%. If the estimated capacity growth is achieved by 2030, the annual growth rate in the period from 2018 to 2030 will be 8,6%
- The key precondition for achieving the estimated growth is the development of the tourist product competitiveness and the achievement of a number of qualitative goals that will position Trebinje on the international tourist market.

The destination should realize three and a half times more of overnight stays of tourists in the next 10 years

2

Growth in the number of realized overnight stays to 700.000 per year



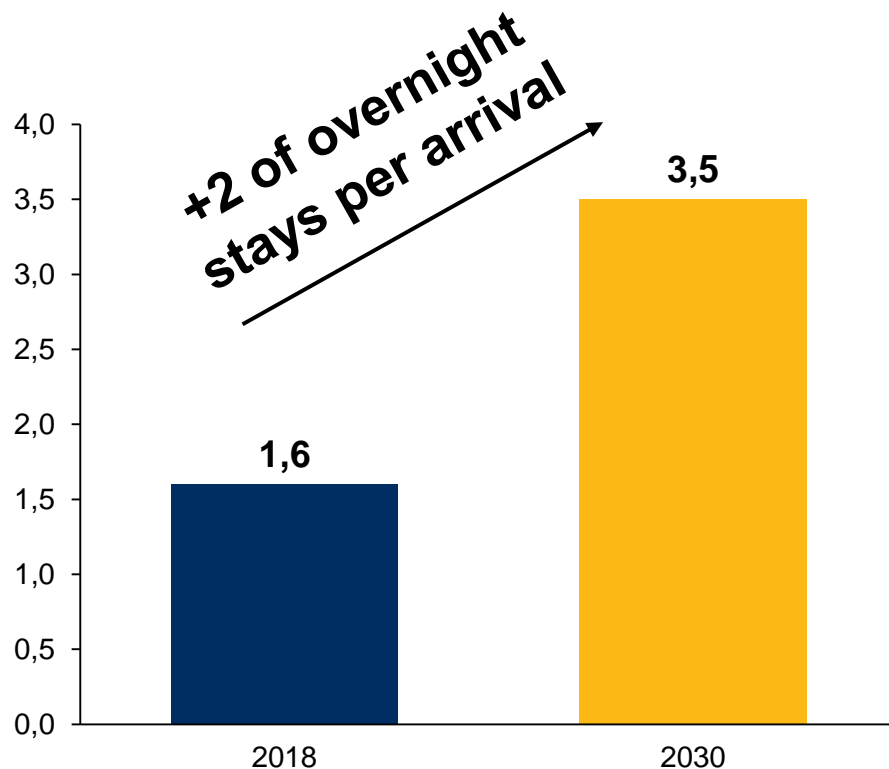
The estimate of overnight stays growth is based on the following preconditions:

- The expected modernization of the tourist traffic measurement and the introduction of efficient monitoring are expected to provide more accurate data on the number of overnight stays, which are already estimated at around 210 thousand annually.
- The stated data do not include non-commercial turnover whose start of measurement will also significantly affect growth.
- If the accommodation capacity increases to 4.700 bed places, it is assumed that they will be filled at least 40% of the year. In order to achieve the business sustainability it will have to achieve the estimated growth of overnight stays.
- The growth of the attractiveness of Trebinje on the international tourist market is also expected, based on the offer expanding and improving the quality of products.
- The mentioned improvement will consequently affect the increase of the average length of stay, i.e., the shift from short-term stay and transit tourism to stationary tourism and longer stay of guests.

The destination should significantly extend the average length of stay in the next 10 years, measured by overnight tourists stays

3

Increasing the average length of stay to 3,5 nights



The estimate of the average length of stay growth is based on the following preconditions:

- After potential change in the method of guests registration and deregistration (digitalization of the system), there will be a significantly higher number of overnight stays in private accommodation in which, compared to hotel accommodation, significantly longer stays of guests are realized.
- Developing the products according to the given tourist vision and positioning, the reduction of tourist tours share in the total tourist demand of the destination is expected, as well as larger number of guests who consume various tourist experiences in the destination during their extended stay.
- The realization of capital tourist projects is expected, such as a mixed-use resort, which, according to the concept, will cause a change in the trend of short stays and attract guests who will have a different place to stay at in Trebinje.
- Construction of campsites in which guests usually stay longer than in other accommodation facilities.

Defined qualitative growth goals have a role as control indicators of the positive impact of proposed development strategies and initiatives

Qualitative growth goals

1

Improving visibility in the tourist market

Trebinje records a strong growth of tourist traffic. However, the absolute numbers are still far from the potential that Trebinje has. With focused and planned marketing activities, Trebinje must build its own position on the tourist market, all on the basis of competitive advantages and a defined tourist vision and positioning.

2

Development of a modern destination management system

With the aim of implementing strategies and defined initiatives, Trebinje will have to develop an advanced destination management system at the local level and become a model example of the organization at the national and state level. Based on the developed system, Trebinje will start managing its own tourism development and clearly direct the activities of tourist sector participants towards the Development Strategy.

3

Diversification of the tourist product

The development of numerous experiences and activities in the destination, primarily in the field of rural tourism and active vacation, but also other defined secondary tourist products, will positively affect the diversification of the tourist product. Diversification is especially important for Trebinje, given that currently the highest share of tourist traffic is achieved on the basis of tourist tours. According to the market requirements and product characteristics, much weaker tourism economic effects are achieved in this way.

4

Satisfaction of the local population

Through the overall development of the tourist offer, but also Trebinje as a City in general, it is crucial to involve the local population in decisions that will significantly affect their quality of life. In this way, the goal is to ensure the satisfaction of the local population and direct the development of the tourist offer according to their expectations as much as possible with a successful balance of progress in the competitiveness of the tourist product, implementation of development initiatives and achieving a higher level of guest satisfaction.



4 Operational Development Strategy

6 key measures and 37 related specific initiatives for tourism improvement have been identified

MEASURE	#	INITIATIVE	MEASURE	#	INITIATIVE
#1 Tourism activation of the public property and public areas	1	Construction of a mixed-use resort	#4 Valorization of cultural and historical heritage	1	Old Railway Museum - Interpretation Centre
	2	Activation of the Trebišnjica river		2	Program of cultural events - amphitheater
	3	Valorization of the City Administration building		3	Improvement of the interpretation and cultural resources conservation
	4	Activation of potential tourist locations		4	Sophistication of the green market
	5	Engagement of an investment advisor		5	Sophistication and tourist activation of the Old Town
#2 Improvement of rural tourism and eno-gastronomy competitiveness	1	Support system - rural accommodation and additional offer		6	Digital interpretation of fortresses
	2	Herzeg gourmet food		7	Interpretation Centre "Jovan Dučić"
	3	Development of a wine strategy		8	Tourist activation of the settlement Krš
	4	Organization of a wine tourist event		9	Development and overtourism of ethno-villages
	5	Support to innovative platforms for local food and beverage valorization	#5 Improvement of the tourist management and marketing system	1	Establishment of the TO organizational structure
#3 Development of active leisure and sports product	1	Adrenaline park Ubla		2	Establishment of the TO Trebinje expert council
	2	Valorization of the Ćiro route		3	Management of the destination visitors flow
	3	Activation of sports tourism potential		4	Unification of points of interest marking system
	4	Development of specialized travel agencies (DMCs)		5	Education for providers of tourist and catering services
	5	Bootcamp	#6 Supporting factor of tourism development	1	Legislative regulation of the destination management system
	6	Organization of outdoor events		2	Improvement of the system of tourist statistics and supervision of activities
	7	Kayking on the Trebišnjica river		3	Education in the field of tourism and catering
	8	Zipline system Trebinje		4	Reconstruction of traffic infrastructure
		5		Examination of health tourism development possibilities	

Development initiatives are developed into 4 operational strategies—investments, competitiveness, management and marketing

Investment strategy



Primary initiatives:

- 1 Construction of a mixed-use resort
- 2 Activation of the Trebišnjica river
- 3 Adrenaline park Ubla
- 4 Valorization of the Ćiro route
- 5 Zipline system *Trebinje*
- 6 Development and overtourisms of ethno-villages

Secondary initiatives:

- 7 Valorization of the City administration building
- 8 Engagement of an investment advisor
- 9 Kayaking on the Trebišnjica river
- 10 Old Railway Museum—Interpretation centre
- 11 Interpretation Centre “Jovan Dučić”

Establishment of the TO organizational structure and elaboration of improvement initiatives:

- 1 Establishment of the TO organizational structure
- 2 Management of the destination visitors flow
- 3 Unification of points of interest marking system
- 4 Education for providers of tourist and catering services

Competitiveness raising strategy



- 1 Activation of potential tourist locations
- 2 Support system - rural accommodation and additional offer
- 3 Herzeg gourmet food
- 4 Development of a wine strategy
- 5 Organization of a wine tourist event
- 6 Support to innovative platforms for local food and beverage valorization
- 7 Activation of sports tourism potential
- 8 Development of specialized travel agencies (DMCs)
- 9 Bootcamp
- 10 Organization of outdoor events
- 11 Program of cultural events - amphitheater
- 12 Improvement of the interpretation and cultural resources conservation
- 13 Sophistication of the green market
- 14 Sophistication and tourist activation of the Old Town
- 15 Digital interpretation of fortresses
- 16 Tourist activation of the settlement Krš
- 17 Examination of health tourism development possibilities

DMO improvement strategy



Strategic marketing plan



Strategic marketing plan and elaboration of marketing guidelines:

- 1 Operational tourism marketing and branding plan
- 2 Professionalization of digital channel management
- 3 Promotion in the area of the Dubrovnik and the North coast of Montenegro
- 4 Innovation of marketing activities
- 5 Multimedia bank
- 6 Tourist ambassadors of Trebinje

4.1. INVESTMENT STRATEGY

The tourist growth and development of Trebinje strongly depends on the implementation of investment projects envisaged by the Strategy

Key ground of investment strategy development and definitions of development initiatives

- In the next subchapter there is an investment strategy elaborated through the definition of 6 primary and 5 secondary development initiatives. The initiatives are ranked by priority based on a combination of Horwath HTL expert opinion and the assessment of destination participants in the interactive strategic workshop. Elaboration of primary initiatives contains following components: an introduction that provides a context of definition, concept (initiatives, the main elements that the initiative implies, key success factors, defined implementation stakeholders, budget assessment for implementation (where possible) and presentation of examples of good practice and inspiration for defined initiatives For secondary initiatives, the concept of that photograph was defined as the inspirational motives of the initiative.
- Investment strategy initiatives will, if implemented, lead to a significant improvement of the tourist profile and products of Trebinje, bring Trebinje closer to the international competitive level, increase the recognizability of the destination, and positively affect the growth of tourist traffic . Without the realization of at least one part of the capital investment projects of the tourist infrastructure, significantly different growth rates of tourism in Trebinje cannot be expected.
- Although a number of significant infrastructure projects are already taking place in Trebinje (eg. construction of a bypass), with the aim of developing tourism in the coming period, the key will be the development of tourist infrastructure that will change the “ face” of Trebinje tourism and position the destination on the tourism market according to the defined vision and positioning,
- There are several key qualitative and quantitative goals listed in the previous chapter, however, in the context of the investment strategy, the goal of transforming the tourist offer of Trebinje is emphasized in the first place by shifting the focus from transit tourism to stationary tourism. For a destination where transit tourism generates more than 60 % of demand, and the average length of stay is 1.6 nights, such a transformation can take more than a decade depending on the quality of project implementation.
- Also, by implementing the investment strategy, it is possible to significantly influence the improvement of the quality of life of the local population who are the bearers of all tourist experiences in the destination, since the built infrastructure is available to the residents of the destination throughout the year.
- In accordance with the stated objectives, but also other components of the strategic framework, the investment strategy contains projects whose implementation period is longer than the implementation period of the Strategy. However the implementation of such projects is priority due to significant impact on all listed components and orientation of the Strategy towards improvement of overall ambience of the city not only as tourist destinations, but also places pleasant to live in.

#1 Construction of a mixed-use resort

Introduction

„Mixed-use”resort is an existing project for which a financial feasibility study was prepared in 2016 and the concept of best use for this zone was defined. Кључни The key goal of the project is to create a sustainable and attractive tourist product and raise the overall value of Trebinje as a tourist destination.

Concept

The project involves the construction of a resort on a total of 300,54 ha with zones that are highlighted as the main elements of the project In addition to these zones, the project includes the construction of parks, green zones and infrastructure facilities in areas between zones of different purposes.

Based on the developed contents, the goal is to attract a new segment of tourist demand and transform Trebinje from a destination of transit tourism to a destination of stationary tourism for guests and residents of higher purchasing power.

In order to implement the project, a proactive approach to the investment market and active cooperation with potential investors is needed in the coming period in order to ensure the implementation of the project. Apart from the lack of financial resources, ie the partner investors, there are no other significant obstacles to the realization of the project, especially because the zone in which the realization of the project is planned is in public ownership. is the zone in which the implementation of the project is planned in public ownership According to the findings from the field, but also the concept of the project, the phased implementation of various components is planned, which is a favorable circumstance for the investor who is not interested in realizing all the components at the same time

Source : Horwath HTL, 2020.

Main elements

Residential zone
(94 ha)

Construction of a complex of residential and tourist villas a total of 12 settlements , two of which are located in the center of the golf course.Total 850 units for за 3.100 users.

Zone for „older guests” (8 ha)

Planned construction of a health facility with a capacity of up to 200 beds and residential houses for the elderly

Catering zone (12 ha)

Construction of a hotel complex and other accompanying facilities with a maximum of 750 beds

Commercial and service zone
(14,5 ha)

Construction of shops, restaurants, bars, event spaces, etc. on the ground floor and office space and apartments on the upper floors

Golf courses and golf club
(157,3 ha)

Construction of 2 courses with a total of 36 holes and large water areas and a golf club that includes facilities with food and drink, golf shop, services, etc.

Recreational and health zone (3 ha)

Construction of sports playgrounds, basketball, volleyball, etc.) with the possibility of building spas and wellness and other facilities in accordance with global trends in healthy living.

#1 Construction of a mixed-use resort

Key success factors

1. Quality execution of all elements of the projects in the scheduled time
2. Investor and operator of the resort with strong previous experience from similar projects
3. Appropriate market positioning of exports, but also destinations
4. Orientation of resort management towards business sustainability in all components

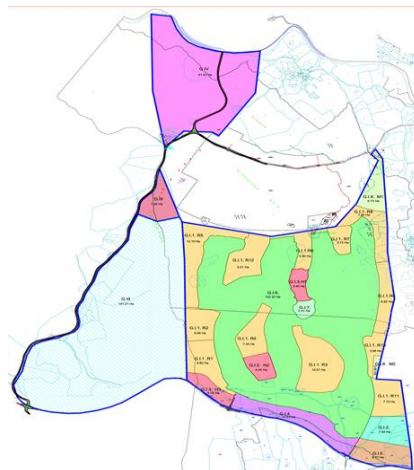
Implementation holders

Holder: City of Trebinje in the preparatory phase, investor in the implementation phase

Indicative budget

Minimum EUR 250 million

Envisaged implementation zone and examples in comparable projects



Envisaged project implementation zone



Envisaged project implementation zone



Aphrodite hills, Kurap

Costa Navarino, Greece

#2 Activation of the river Trebišnjica

Introduction

The river Trebišnjica is one of the strongest competitive advantages and key resources for the future tourist development of Trebinje. With the aim of tourist valorization and spatial planning, the goal of the initiative is to develop a planning framework and definition of activities through which the river Trebišnjica will become a key positive environmental factor and a tourist point of interest in Trebinje.

Concept

Since it does not currently exist, the goal of the initiative is to develop a document that will define the development future of the river and the surrounding area, i.e., to develop a master plan for tourist valorization of the river Trebisnjica, from Hydroelectric Power Plant Trebinje 2 to the monastery Tvrdoš. When making the plan, it is necessary to pay attention to controlled urbanization according to the model of high level of urbanization in the center of the settlement, while along parts of the river outside the settlement it is necessary to undertake activities that will result in lower level of urbanization. Infrastructure works must include the arrangement of both sides of the river (taking into account the possibilities) and for example the arrangement of promenades, paths for cyclists, the installation of benches, the arrangement of a larger public space opposite the Old Town (eg square / event space or urban promenade), construction of catering facilities, playgrounds for children, commercial catering facility in the center of the settlement, modern bathing areas, etc.. By arranging the river Trebišnjica, the goal is to create a new attractive spatial unit for the development of activities on water and land, but also to improve the quality of life of the local population throughout the year and connect rural and urban elements of Trebinje and surroundings

Main elements

Controlled urbanization

The plan of tourist valorization is necessary to ensure the preservation of the natural character of the river and the surrounding area and to define larger interventions in the part of the flow through the urbanized area.

Infrastructure for tourist activities

It is necessary to anticipate infrastructure for a number of activities on the river and along the river (e.g. kayaking, swimming, cycling) and through the sophistication of the space provide a better experience

Ambient attractiveness

In the development and design of various components of space activation, it is necessary to pay attention to quality design that will lead to a higher level of ambient attractiveness.

Recreational space

Trebišnjica river and the surrounding area should become a center of recreation, and for this purpose it is necessary to arrange a separate infrastructure, but also thematization of space (training grounds, trails, etc.)

Catering facilities

Currently, the river bank is not a tourist point of interest and because the number of catering facilities is not enough, and the development of the project it is necessary to allocate space for content of this kind

Access and accessibility

It is necessary to ensure quality access to facilities (parking, trails, etc.) and special attention should be paid to accessibility for people with reduced mobility (wheelchairs, etc.

Construction of a pedestrian bridge

In accordance with further tourist development and with the aim of expanding the tourist attractive zone, it is proposed to build a pedestrian bridge from the beach to the old railway station.

#2 Activation of the river Trebišnjica

Key success factors

1. Controlled urbanization of the area around the river Trebišnjica
2. Construction of infrastructure in accordance with tourist products and market positioning of the destination
3. Development of attractive contents and activities within the "new" tourist space
4. Defined system of space maintenance and new contents

Implementation holders

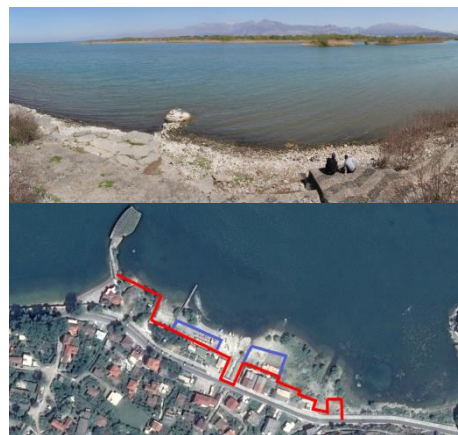
Holders : City of Trebinje

Supporting: Private entrepreneurs, HPP Trebinje

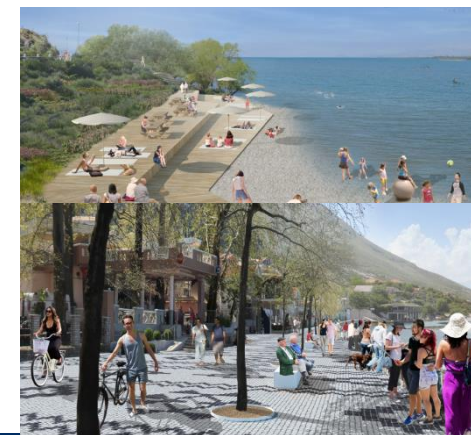
Indicative budget

EUR 250-300 thousand (master plan development)

Examples of comparable projects



Activation and Revitalization Project of Skadar Lake, Albania



Project of tourist valorization of Lake Lepenica in Fužine, Croatia

#3 Adrenaline park Ubla

Introduction

Given that active vacation in the destination is recognized as one of the main tourist products on which the tourist development of the destination will be based, it is necessary to develop an appropriate offer that will support such market positioning. In this context, the adrenaline park in Ubla is one of the key initiatives for the development of active rest.

Concept

Visiting the destination, it was noticed that the mountain area of Ubla at this time is not adequately valorized for tourism and that its resources have a satisfactory base for tourism development, primarily in the direction of active tourism. In this regard, this initiative proposes the development of an adrenaline park that will include a large number of different facilities that can be consumed throughout the year. Activities and infrastructure that can be developed within the park include zipline, artificial rock climbing, various training grounds for natural obstacles, paintball range, human table football, bubble football, zorbing, archery, etc. . Special part of the park should include a specially designed playground for children and young people. As for winter activities such as sledding, it is necessary to arrange the trail and equip the cable car. The fact that in the area of Ubla there is the necessary basic infrastructure (water, electricity, internet, etc.) further supports the implementation of this initiative. An important component of the park itself is safety, and through the construction of infrastructure, but also the implementation of the initiative, it is necessary to focus on this factor.

Main elements

Zipline

The key attraction of adrenaline parks is the zipline, for the realization of which it is necessary to define an ideal location on the mountain that meets the basic prerequisites for construction.

Training grounds and playgrounds

A large number of different training grounds and playgrounds will contribute to the diversity of the offer, which will cover different market segments, from parents with children to team-building companies.

Paintball range

Given the attractiveness of the terrain, the paintball range would be an important element of the park that can be used throughout the year.

Archery range

One of the activities that can be developed within the park is archery, where it is possible to implement an educational component for the youngest users.

Toboggan run, cable car and zorbing trail

The winter offer of the park includes sledding, for the successful realization of which it is necessary to enable the cable car, and to arrange a toboggan run that will be used for zorbing outside the winter months.

Catering facility

The park should also include a catering facility that will serve visitors for refreshments and meals after the activities, and have a toilet, reception, locker room and the like.

#3 Adrenaline park Ubla

Key success factors

1. Defining an adequate location and spatial planning of project implementation
2. Development of an attractive offer and setting up various contents for several segments of tourist demand
3. Finding an adequate workforce trained to provide services specific to the adrenaline park
4. Safety of visitors in consuming park activities

Implementation holders

Holders : City of Trebinje, investor

Supporting: TO Trebinje, private entrepreneurs, specialized travel agencies (DMC)

Indicative budget

150 – 200 thousand euros (depending on the concept of the adrenaline park, content, area, number of employees, etc.)

Examples of comparable projects



Acropark Rio Centa, Trentino Italy



Adrenalin park XP, Tirol, Austria



Flying Park Malè, Trentino, Italy



Outdoorprofi adrenaline park, Tirol



Rizvan city, Croatia



Adrenaline park XP, Tirol, Austria

#4 Valorization of the route „Ćira“

Introduction

The narrow-gauge railway Ćiro is historically important for the destination, so it is necessary to revitalize that resource in a way that the bicycle path will be arranged along the former route of the railway. The arrangement of the bicycle path is another in a series of initiatives that will position Trebinje on the tourist market as a destination for active rest.

Concept

Arranging a bicycle path on the former narrow-gauge railway route mostly involves infrastructural interventions, as some parts of the route are currently not suitable for cyclists. In this regard, the initial activity involves defining the entire route that will be converted into a bicycle path in order to, in case of impossibility of revitalization of the entire route, define alternative routes that will preserve the whole. It is proposed that the bike path stretches from Lake Bileća, through Klobuk, Lastva and the center of Trebinje all the way to the path that goes in the direction of Dubrovnik. The concept of route development must include the definition of various stations on the track that would serve cyclists for refreshment, service or simply relax and enjoy nature. One of the stations will certainly be the interpretation center “ Ćiro”, which would be located in the center of Trebinje in the old building of the railway station, and it is necessary to consider other possibilities of remodeling the old stations (hotels, etc.).

It is important to point out that the implementation of this initiative implies the development of tourism in rural parts of the destination as cyclists have a practice of stopping in family households and restaurants

Main elements

Arranged bicycle path

The main element of the proposed initiative implies that the bicycle paths are adequately prepared for use and special emphasis should be placed on a quality surface..

Refreshment, service and rest stations

As an additional element of attractiveness, it is necessary to define the locations on the route itself where cyclists will have the opportunity to take a break from riding, etc.

Signaling

Path signalization should be designed in accordance with the brand of the destination, and the route and / or capillary routes should be adapted to various market segments.

Application development

In addition to the whole experience, it is necessary to create an application that will display all the main points on the track as well as a GPS tracker that will monitor the movement of cyclists in real time.

Revitalization of rural space

One of the elements of the initiative is the distribution of tourist activities in rural areas. To this end, it is necessary to highlight rural households, wineries, restaurants, ethno-villages, etc.

#4 Valorization of the route „Ćira“

Key success factors

1. Successfully arranging the basic infrastructure to create a bike path
2. Optimal locations and attractively designed stop station concepts
3. Quality and variety of additional services and facilities along the bike path
4. Quality designed infrastructure maintenance system and successful cooperation with private shops, households, etc.

Implementation holders

Holder: City of Trebinje

Supporting: TO Trebinje, citizens associations, sports and recreational associations and clubs from the area of Trebinje, travel agencies

Indicative budget

The regional average for the projects of conversion and revitalization of old railways is **25 thousand euros per kilometer**

Examples of comparable projects



Parenzana, Istria, Croatia



Hotel „Ravno Station“

#5 Zipline system Trebinje

Introduction

Given the extremely favorable relief characteristics and rich natural heritage, the creation of a zipline system in the destination area would contribute to a better valorization of these resources. The goal of establishing a zipline system in Trebinje is to develop the largest and one of the most attractive zipline systems in Southeast Europe

Concept

The primary step of successful implementation of this initiative is to achieve cooperation with professional specialized agencies that need to be engaged in order to record the terrain and propose optimal locations for the establishment of a zipline system. Based on the findings of experts, and defined project interventions in terms of infrastructure, it is necessary to ensure access to these locations and start interventions in space in order to establish a zipline connection. The main focus is on high safety standards and the quality of the experience, but also the possibility of relatively easier accessibility (van, jeep). Also, an important component is the definition of the management mechanism of the system with the possibility of issuing a concession to representatives of the private sector who would be in charge of the operational management of the entire system. Since the zipline system will include locations from geographically remote parts of the destination, it is necessary to design an accompanying offer, mostly through the development of the offer of rural tourism. The length, height differences, speed or other characteristics of a particular zipline route must have unique characteristics in order to make this system stand out in a regional context

Main elements

Infrastructure required for zipline

The basic infrastructure required to create a zipline system must be according to defined regulations and meet safety standards

Attractiveness factor

The system in Trebinje must have significant unique sales propositions that will position it as unique and especially attractive (e.g. the fastest, the largest height difference, length) at least at the regional level.

Signaling

Since the assumption is that the locations will be distributed throughout the destination, it is necessary to define an adequate signaling system to make it easier for visitors to navigate.

Access roads

Access to sites must be unimpeded for both individual users and larger groups of users.

#5 Zipline system Trebinje

Key success factors

1. Attractiveness of the locations where the zipline system will be located
2. Ensuring unimpeded access to sites
3. Expertise and professionalism of the workforce
4. Meeting high safety standards

Implementation holders

Holder: City of Trebinje , investor

Supporting: TO Trebinje, private entrepreneurs, specialized travel agencies (DMC)

Indicative budget

450 – 550 thousand euros

Examples of comparable projects



Zipline , Omiš, Croatia



Jabel Jais Flight, UAE



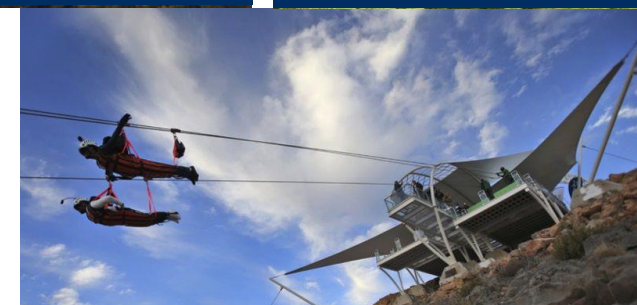
Zipline, Pujeka, Croatia



Ziptrek, Visler, Canada



Zipline Šibenik, Croatia



Jabel Jais Flight, UAE - the longest world zipline

#6 The arrangement and touristization of ethno-villages

Introduction

The arrangement and touristization of the ethno-village aims to show the characteristics of the traditional life of the village of Trebinje so that visitors to the destination can get an insight into the historical and cultural heritage of this area. In this way, the implementation of this initiative will strongly contribute to a better valorization of the destination's rural tourism.

Concept

Initially, the initiative involves finding ideal locations, i.e.. settlements that have the necessary predispositions for arranging into an ethno – village. Based on the tour of the destination and from interviews with key participants, it was concluded that the best potential for the implementation of this measure has the village of Uvjeća (other adequate alternatives should not be excluded). Once the location is confirmed, it is necessary to elaborate in detail the concept of interpretation and development of attractive facilities in order for the village to become a unique tourist site in this destination. Some of the tourist contents that can be planned within the ethno-village include the presentation of traditional products by local farmers, demonstration of indigenous crafts, petting zoo, i.e.. an enclosed space in which there would be animals with which children could make contact and learn something about them through guided education, participation in the daily work of farmers, etc. In addition, it is necessary to envisage the arrangement and / or construction of adequate accommodation facilities, as well as the development of the catering offer. An important factor is the establishment of a business model of rural management, which, depending on the analysis of advantages and disadvantages, can be PPP *, private or public property.

Source: Horwath HTL, 2020.

* PPP – public-private partnership

Main elements

Attractiveness of the village

The selected village must have certain architectural and spatial features in order to become a desirable place to visit with its attractive ambience.

Local farmers

Farmers who will stay in the area of ethno-villages will be an important factor because they will be the resource that will transmit the experience to visitors.

Local crafts

Just like farmers, local artisans will pass on their knowledge of making specific products to visitors and thus create an attractive tourist offer.

Petting zoo

The construction of this attraction would imply a unique tourist attraction in this area with a special emphasis on attracting families with children.

Accommodation offer

As part of the ethno-village, it is advisable to arrange (possibly as the second phase of development) a certain number of accommodation units in a traditional style, but uncompromising comfort.

Catering offer

The construction of restaurants and similar facilities will further enrich the tourist offer and allow visitors to taste indigenous food.

#6 The arrangement and touristization of ethno-villages

Key success factors

1. Selection of an adequate location, i.e. a village that already possesses certain predispositions and resources for arranging into an ethno-village
2. Creatively developed concept of tourist offer
3. Participation of local farmers and private individuals in the implementation of the project
4. Defining the best management model

Implementation holders

Holder: City of Trebinje, TO Trebinje, investor

Supporting: Agrarian Fund, farmers and private individuals. Museum of Herzegovina

Indicative budget

2 – 3 million euros (significantly depends on the concept)

Examples of comparable projects



Ethno-village Drvengrad, Užice, Serbia



Ethno-village Stanišići, Bijeljina

Valorization of the City Administration building and engagement of an investment advisor

#7 Valorization of the City Administration building

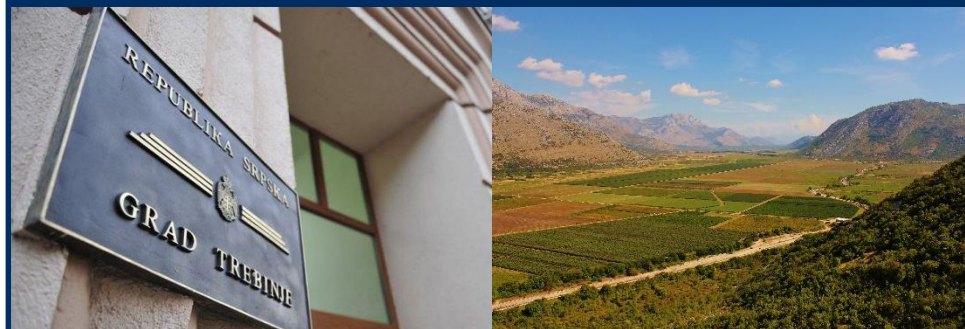


The building of the City Administration is located in the center of Trebinje and due to its location represents an attractive resource for tourist valorization in terms of conversion into accommodation.

The reason for proposing the initiative is the current weaker functionality of the City Administration building since it does not provide the possibility of accommodating all departments due to lack of capacity, but also the location of the building due to which the City Administration has fewer parking spaces. With the aim of realization, it is necessary to find an alternative location for relocating the City Administration to a location outside the city center and devising a concept that will provide an optimal working atmosphere and conditions for employees.

For the facility in the center, it is necessary to design a market-attractive concept of the best use, and make the necessary studies that will define the most commercially attractive way of developing the facility. Also, a decision of the current owners of the building on the sale, giving the building in concession, etc. is needed.

#8 Engagement of an investment advisor



Given the potentially significant number of tourism investment projects in the area of Trebinje in the coming period, it is proposed to hire an investment advisor by the City of Trebinje

Namely, given the potentially particularly strong impact of the mixed-use project of the Trebinje Golf Resort, it is proposed to hire a professional external associate who could adequately provide professional support to the City Administration in preparing the project for the investment market and in the investment opportunity communication process. An external associate should be an international company with experience in similar business - destination planning and investment consulting.

It is proposed to engage in the following scope: 1.) preparation of an investment teaser for the mixed-use project Golf-resort Trebinje. 2.) communication of the investment opportunity to selected representatives of the investment market; 3.) support in tender preparation; 4.) support in the process of partner selection and commercial conditions of cooperation.

Kayaking on the Trebišnjica river and the Museum of the Old Railway - interpretation center

#9 Kayaking on the Trebišnjica river



The initiative for kayaking on the river Trebišnjica implies a strategic approach to the development and activation of the river as a center of kayaking through systemic investments in infrastructure and targeted commercialization. In order to preserve the natural environment of the space, the initiative mainly envisages the so-called “soft investment” in basic infrastructure such as equipment rental and service areas, changing rooms for users and the like. In addition to basic infrastructure interventions, it is primarily necessary to design an experience for various groups of market segments, which would primarily differ in the level of complexity, length of the route, etc. Since the river flows through the center of Trebinje, the overall experience of the initiative should include other activities such as enogastronomy, and work on the development of activities “kayak and walk”. Also, with the aim of further bringing the initiative closer to various groups of users, the project should focus on accompanying sports and recreational facilities, facilities for families with children, interpretation center, etc.

#The Museum of the Old Railway - interpretation center



The main idea of this measure is to renovate the old building of the railway station into an interpretation center that would show the historical importance of the narrow-gauge railway Čiro for Trebinje and all areas through which the railway passed. In this way, the historical and cultural significance of the railway would be adequately valorized, which would further enrich the cultural and historical offer of the destination. Besides the very interpretation of the railway route, which must be presented in a modern way and include the most important knowledge and artifacts related to the route itself, the center could include a bicycle shop, as the historic narrow-gauge railway route should be turned into a bicycle path. A bicycle shop can also contain a service and be a kind of information center. This would make the center the subject of visits and cyclists, which would focus on this market segment, with a dominant focus on families with children and school groups. With the precondition of a creatively designed concept, the center could become a regionally recognized attraction and attract guests throughout the year.

Intrepretation Center “ Jovan Dučić”

#11 Intrepretation Center “ Jovan Dučić”



С обзиром да јеConsidering that the birthplace of Jovan Dučić is Trebinje and that his legacy is closely connected to his homeland, it is proposed to build an interpretation center in which his life and works will be presented .The primary activity involves determining the adequate location of the interpretation center, either within Dučić’s birthplace (possible limiting factors in terms of space size) or a space completely independent of the birthplace, which would potentially enable a more attractive exhibition. Secondary activity involves defining the concept of interpretation in which historians should be engaged.

The content of the interpretation center is a key component and therefore it is necessary to ensure an adequate amount of items that will present the rich heritage of Jovan Dučić. It is necessary to determine interesting stories from Dučić’s life that could be interpreted with the help of modern technology. The center built in this way has the opportunity to become the scene of various thematic events in the field of culture, science, etc.

4.2. STRATEGY FOR RAISING COMPETITIVENESS

Initiatives contained in the strategy of raising competitiveness aim to improve the competitiveness of tourism in Trebinje through “soft” investments

Key pillars of the development of the competitiveness strategy and preconditions for implementation

- In the next subchapter there is a strategy for raising competitiveness elaborated through the definition of 17 development initiatives. Initiatives are not ranked according to priorities but are grouped on the basis of previously defined development measures (mainly according to the tourism products they are focused on implementation, budget assessment for implementation (where possible) and presentation of examples of good practice and inspiration for defined initiatives.
- The developed initiatives aim to encourage a proactive approach of participants to the development of tourism products, a strategic approach to planning key locations and areas with the greatest potential for tourism development, development of agriculture and gastronomy, and designing an adequate system to provide significant funds for rural households. from funds at the local and national level. However, through all activities it is crucial to create preconditions for further development of tourism in the direction defined by the vision and the desired market positioning.
- It should be noted that at the heart of almost all developed initiatives are two components: 1) improving the cooperation of local participants from the private, public and civil sectors in the implementation of tourism initiatives, and 2) development of project documentation for various project initiatives in the coming period
- Both components of the destination participants have been defined as some of the key shortcomings in the development of tourism in Trebinje so far and, according to the expert opinion of Horwath HTL, have been placed in the focus of a number of proposed initiatives. Cooperation of local participants implies the establishment of communication, but also the provision of support (financial, advisory, etc.) by the public sector to various initiatives that will lead to faster development of the tourist offer of Trebinje. On the other hand, the precondition for the planned development of cities and other areas is spatial planning, and for the needs of tourism, this documentation has one of the key roles in the initial planning phase, but also in the continuation of investment projects.
- Special focus is placed on the development of rural tourism, currently a deficit product, which has a strong development potential and needs to be developed with the initial strong support of the public sector. One example of good practice in this context is Istria, which has developed its rural tourism on the basis of strategically designed incentives to farmers by the public sector to improve quality and tourist valorization of production.
- Also, part of the initiatives is oriented towards the general sophistication of various spatial units of Trebinje that represent tourist points of interest, or they can be after the implementation of the proposed projects. These initiatives include raising the tourist experience of Trebinje to a global level of quality and enabling the development of micro and small entrepreneurship and crafts, and consequently controlled tourist valorization.

#1 Activation of tourist attractive locations

Concept

In the area of Trebinje, there are a number of tourist attractive locations, however, primarily due to the lack of detailed spatial and urban plans, but also conceptual designs for these locations, they are not currently valorized for tourism. Therefore the first step in the implementation of the initiative is the development of a quality/spatial urban plan that will define the purpose of several zones in the area of Trebinje and, among others, to define the zones of catering-tourist and recreational purpose. Also, it is necessary to define zones that must not be further urbanized and reactivate the rule of protection of Mediterranean architecture.

The key goal of the initiative is that primarily for the locations of Trebinje Lake, the area along the lower course of the river Trebišnjica, the picnic area of Lastva and the Trebinje Forest define tourist concept of best use. The concepts need to be based on several factors, the most important of which are: space characteristics, market feasibility and attractiveness, land ownership, available and necessary infrastructure, destination positioning, etc., all while respecting the principles of sustainable development and controlled environmental impact. Some of the purposes of locations can be resorts of different types, recreation centers on land and water, etc. After preparing the necessary documentation, it is necessary to approach the investment cycle, and in accordance with the concepts of best use, it is necessary to define the business model and the method of project implementation. In the first place, the above implies a decision on the independent implementation of the project by the public sector, the establishment of a public-private partnership, or the offer of the project on the private investment market.

Key success factors

1. Engagement of a professional advisory team
2. Development of concepts in cooperation with all interested destination participants
3. Objective purpose of locations and definition of content required for strategic destination development
4. Diversification of the tourist product of the destination through the activation of key tourist locations of the destination
5. Ensuring a sufficient amount of financial resources for the successful implementation of projects.
6. Respect for the principles of sustainable development and controlled impact on the environment while protecting indigenous architecture

Implementation holder

Key: City of Trebinje

Supporting: Private investor

Indicative budget

The concept of best use, 30 thousand euros for smaller projects while the required budget for large projects can grow up to several hundred thousand euros

#2 Support system - rural accommodation and additional offer

Concept

The initiative to establish a support system is crucial in strengthening the competitiveness of the tourism sector in Trebinje, and involves primarily two components:

1) encouraging the development of rural accommodation capacity

Types of accommodation that would be the subject of the system include agritourism, rural holiday homes, rural, diffuse, boutique and wine hotels, rural resorts / resorts, ethno villages and ethno resorts, etc.

2) creating additional tourist offer of higher or high added value

Support intended for rural households for additional enrichment and expansion of the offer, in the form of improvement of tasting places, catering facilities, construction of interpretation centers, etc. The first step in creating the system involves the establishment of a special fund to finance preferential loans with a grace period, the provision of grants (for part of the investment), financing the preparation of project documentation, etc. It is recommended that the amounts be generous in the beginning in order to encourage the realization of quality projects and the creation of critical mass. Also, with the aim of more successful financing of various development projects, through a designed system it is necessary to provide interested users with institutional support in the realization of funds from international funds and thus potentially relieve their own budget allocations while achieving the set goals. potentially relieve own budget allocations while achieving the set goals of the Initiative. The initiative of the support system for rural accommodation and further development of the additional offer are directly in line with the future strategic direction of the destination and positioning in the context of a rural destination of high quality.

Key success factors

1. Establishment of a fund for the support system at the city/republic level.
2. Designing support models and defining activities eligible for funding
3. Raising awareness among local participants about the importance of further investment in strengthening the quality of supply.
4. Providing institutional assistance for withdrawals from international funds
5. System for monitoring the success of the implementation of measures

Implementation holders

Key: City of Trebinje, Republic of Srpska

Indicative budget

According to the available budgets of the City of Trebinje, Republik of Srpska, donor institutions and the like.

#3 Herzeg Gourmet

Concept

Initiative Herzeg Gourmet is a potential upgrade of previous activities in the development of the Herzeg House as an initiative by the Agrarian Fund and the City of Trebinje and its main goal is to establish a model of cooperation between producers of agricultural products and catering facilities with the intention of strengthening the presence and visibility of indigenous products in catering facilities. Apart from the Herzeg House store and several restaurants in eTrebinje area, the presence of domestic indigenous products in restaurants is quite limited. The implementation of the initiative aims to establish a logistics system that will ensure timely delivery of products to facilities, and improve communication between supply and demand - in this case, producers and restaurants. The role of the public sector in this initiative is to establish a platform for cooperation between participants, to maintain communication and provide information on the planned quantities of products available to producers, and the physical delivery of products after ordering. All of the above is the role of the public sector for the already developed storage and distribution system for the needs of the Herzeg House. The next step in the implementation of the initiative is the certification and branding of catering facilities that participate in the initiative to present Herzegovinian domestic products (such as Herzeg Gourmet) and thus expand the coverage of the nationally recognized eno-gastronomic brand *Herzeg House*. Through the implementation of the initiative, it is necessary to ensure sufficient quantities of existing products and encourage the production of new ones that are adapted for use in catering (e.g. cleaned and prepared potatoes, etc.)

Key success factors

1. Successfully launched model of cooperation between the public and private sector - achieving a synergistic effect
2. Involving a sufficient number of agricultural producers in the initiative
3. Quality distribution chain - low share of damaged goods, timely delivery, etc.
4. Agreed favorable commercial terms of cooperation (final price for the caterer, deferred payment, etc.)
5. Product quality and innovative interpretation in catering facilities - a step forward in the offer of the food and beverage sector

Implementation holders

Key: City of Trebinje, the Agrarian Fund of Trebinje, the food and beverage sector Trebinje, , farmers

Supporting: TO Требиње

Indicative budget

Financing within the regular budgets of the Agrarian Fund and the City of Trebinje

#4 Development of a wine strategy

Concept

The initiative to develop a wine strategy for the area of the city of Trebinje has as its main goal the further establishment of the wine industry as a key eno gastronomic attribute and one of the elements of the destination with the greatest potential for further development of a wine strategy.

Situational and market analysis shows that the existing wine cellars (Vukoje, Anđelić, Tvrdoš Monastery) are recognized as some of the key attractions of the area, which indicates that the market already has certain levers that can be the basis for future development, with preconditions for strengthening institutional, strategic and financial support.

For this reason, the main goal of the development is to improve the potential of wine tourism by adopting a strategy that will specifically define the guidelines for further development and systematize the key steps in achieving it.

The wine strategy would include conducting an analysis of the current state of the wine sector, defining strategic development guidelines, and proposing operational interventions and initiatives to improve the competitiveness of the destination's wine tourism.

Wine tourism, as one of the key elements of the destination offer, which bases its potential on existing proactive participants, tradition and recognized business knowledge and experience, in the future tourism development of the city can play a key role in building image and positioning the destination as a destination of added value, provide a motive for achieving a higher average length of stay.

Key success factors

1. Strong cooperation with existing participants from the private sector
2. Defining real current starting points of development and ranking of aspirations for future development
3. Development of a strategic framework for the wine sector of the city of Trebinje
4. Defining strategic guidelines and specific operational interventions and initiatives
5. Wine strategy implementation success monitoring system

Implementation holders

Key: City of Trebinje, Republic of Srpska

Supporting: Interested representatives of the private sector

Indicative budget

80 thousand euros

#5 Organization of a wine tourist event

Concept

Building on the initiative of developing a wine strategy, the organization of a wine event aims to build an internationally recognized eno gastronomic event that would serve as a key promotional tool in strengthening the visibility and positioning of wine tourism destination

One of the elements of the initiative is the professionalization of the organization of one or more wine events during the year in order to position Trebinje more strongly as a wine destination.

The design, organization and implementation of such an event would create a significant basis for the private sector to promote and sell wine while enhancing market visibility.

The wine event as such should become significant in the regional market with an emphasis on professional management, connecting various participants in the field of food and beverages, and upgrading existing private initiatives that already contribute to raising awareness of wine tourism within this destination (e.g. Salon žilavke and Wine Fair).

Some of the potentially attractive wine-themed events include events called Wine Trail, Wine & Walk, Wine & Cheese, etc.

Given the potential importance of a successfully realized wine event for the wider region, in the context of organization and implementation, the support of public and private participants from the wider region is expected. Also, given that the events as the main goal have a contribution to the promotional visibility of the destination, it is extremely important to provide sufficient financial resources for the implementation of a quality accompanying marketing campaign.

Key success factors

1. Successful establishment of cooperation with all interested participants
2. Ensuring sufficient financial resources for implementation
3. Strong cooperation with local / regional agencies
4. Conduct strong marketing campaigns
5. Organization of events in the pre-season and post-season

Implementation holders

Key: Event organizer

Supporting: City of Trebinje, interested representatives of the private sector

Indicative budget

60-70 thousand euros

#5 Organization of a wine tourist event

Examples for inspiration



Istria Wine & Walk, Istria



VinArt Grand Tasting, Zagreb



Vienna wine hike, Vienna



Bordeaux wine festival, Bordeaux



Tuna, sushi & wine festival, Zadar

#6 Support for innovative platforms for the valorization of local food and beverages

Concept

The key goal of the initiative is to provide support in the development of various platforms aimed at the development of local food and beverages and related activities. In the area of Trebinje, such an approach is used by various participants, the most prominent of which are Slow Food Convivium Trebinje, Agricultural cluster „Old Herzegovina“ and Agrarian fund with the initiative “Herzeg House”. Part of these initiatives is a number of smaller producers who adhere to the basic principles of using indigenous foods in business

Given the existence of platforms, the main idea of the initiative is to recognize the activities of local actors primarily by local authorities, and then to develop through available funds at the national and international level (e.g. USAID, etc.) However, a prerequisite for such a way of cooperation is a clear articulation of projects and the need for platforms for the successful valorization of local food and beverages. In this context, the Slow Food Travel project stands out, the key components of which include the following items. 1) 1 Mapping and networking of partners 2) Training / creating and developing an offer 3) Communication and promotion. After creation, the goal is to „pack“ experiences and “commercialize through specialized travel agencies. In addition to the above activities, the project also aims to arrange a place for tasting and space for product interpretation. On the other hand, it is possible to organize events in rural areas such as village markets, themed ethno festivals, etc. and arranging historical sites such as mills , threshing floor etc. Although this approach is closely related to the Slow Food Convivium, the initiative leaves room for other platforms and other conceptual projects.

Key success factors

1. Establishing cooperation between local participants and understanding and accepting the concept of cooperation
2. Development of creative and attractive experiences in rural households and other locations
3. Successful commercialization of designed products in cooperation with specialized agencies
4. Arrangement of catering facilities within rural households and production plants
5. Designing attractive additional events and additions to the project in the coming period

Implementation holders

Key: Slow Food Convivium Требиње, Agricultural cluster „Old Herzegovina“, rural households;

Supporting: : City of Trebinje, Agrarian Fund

Indicative budget

50 thousands euros – estimate in accordance with the project documentation submitted by Convivium Slow Food

#7 Activating the potential of sports tourism

Concept

Given the future importance and potential of sports and active recreation as one of the foundations for further development of tourism in Trebinje, an initiative to activate the potential of sports tourism is proposed through the realization of which the goal is to devise a model of more successful commercialization of existing and planned facilities, such as a sports hall, city pool, football stadium, etc. including the development and construction of other necessary infrastructure that is currently missing.

One of the goals of the initiative is, through strengthening cooperation and synergy between relevant participants, to continuously work on improving the quality and professionalization of sports and sports activities in the city.

In addition to the adaptation and construction of infrastructure, investments are needed in the so-called soft components, which may include promotional and marketing activities, but also the design of various events in this segment, such as organizing preparations for sports clubs, organizing sports camps for different ages advocating for development at higher levels of government and organization of sports tournaments, competitions and the like.

In order to ensure a balance between public and private interests at the destination level, but also the successful implementation of the initiative, it is proposed to establish a working body or group.

The mentioned body / group must be in the form of a public-private partnership and gather all key participants of the destination who would, through joint planning, promotion, etc. actively work on further professionalization of the sports segment and recognizability of Trebinje as a sports tourism destination. The key task of the body is to design a model through which the potential of sports tourism in Trebinje will be successfully developed and commercialized and thus activated.

Key success factors

1. Establishment of a working body / group at the destination level with a focus of activities on designing a potential activation model
2. Adaptation and raising the quality of the existing infrastructure
3. Building the missing infrastructure
4. Strengthening cooperation with regional sports clubs
5. Organization and planning of promotional activities aimed at positioning the destination as a destination for sports tourism

Implementation holders

Key: City of Trebinje and competent city departments

Supporting: Sun City, sports clubs

Indicative budget

The primary activity, the establishment of a working body, does not involve financial investments

#8 Development of specialized travel agencies

Concept

Initiative for the development of specialized travel agencies (DMC) aims to improve the offer of active holidays, based on public sector support for the creative tourism industry as a key pillar for the development of high value-added products through the following components:

1) Joint marketing activities of existing and new tourist agencies with the tourist organization through appearances at specialized fairs, Cross Marketing activities, etc. Предуслов A prerequisite for cooperation is to design an attractive offer of active holidays based on the built infrastructure support.

2) Education, training and certification of service providers specializing in active holidays with the aim of professionalizing and improving product quality and meeting high safety standards. Компонента The component is intended for existing and potential new service providers Through this component it is possible to support current service providers (citizens' associations, clubs, etc.)to open stores and professionalize the current way of doing business.

3) Procurement of equipment for specialized travel agencies involves co-financing the procurement of quality equipment for the safe conduct of activities and meeting the high expectations of visitors. The procurement of paragliding equipment, kayaks, bicycles, etc. stands out as an example.

The primary task of the public sector is to define priorities in cooperation with destination participants related to the topic, and according to the agreement to allocate responsible institutions / departments, individuals, and the necessary financial resources for the successful implementation of the initiative.

Key success factors

1.

A model of cooperation developed in cooperation with agencies currently operating within the destination

2.

Focus on the quality of evolving experiences, and on diversification

3.

Development of activities based on recognizable destination resources

4.

Interest of current and new organizations, individuals and cooperation agencies

5.

Providing a sufficient amount of financial support for the stable development of activities

Implementation holders

Key: City of Trebinje

Indicative budget

It will be defined on the basis of available funds

#9 Bootcamp

Concept

Bootcamp is the name of an active holiday product that is also based on the fact that this segment of the tourist offer will be one of the strategic pillars of the future development of the destination.

The planned development of the initiative is aimed at different ages and market segments, and the main motive for visitors is to overcome their own challenges related to physical activities that may include, for example, losing weight, quitting smoking, reducing the use of digital devices (digital detox and others).

The initiative is designed so that the camp is organized in nature in the area of Jazina due to the fact that various camps for children are currently organized in that location.

The activities of the bootcamp can vary, but usually include a combination of intense aerobic training, strengthening power and speed, etc. Programs are usually designed so that very intense segments and segments of weaker activity are constantly alternating at intervals.

The key advantage of this approach is the fact that the camp programs provide different training programs for the whole body through strengthening and endurance. Also, the programs are designed to be challenging and diverse, usually do not require additional special equipment, and strengthen the sense of community between participants. Given the increased awareness of personal health at the global level and the fact that in the regional context there is a lack of modern and innovative approaches in this segment, this initiative has the potential to significantly contribute to strengthening the visibility of Trebinje as an active holiday destination.

Source : Horwath HTL, 2020.

Key success factors

1. Recognizable product, strong online presence and targeted promotional activities
2. Professionally developed programs based on a scientific approach and creativity
3. Product affordability in financial as well as geographical terms
4. The quality of the developed infrastructure and the focus on safety, comfort and user experience
5. Successfully developed business model and financial sustainability of the product

Implementation holders

Key: City of Trebinje, private investor in the case of PPP
Supporting: : TO Trebinje

Indicative budget

According to the detailed concept of best use and architectural project

#9 (Bootcamp)

Examples for inspiration



The Body Camp, Ibiza and Majorca, Spain



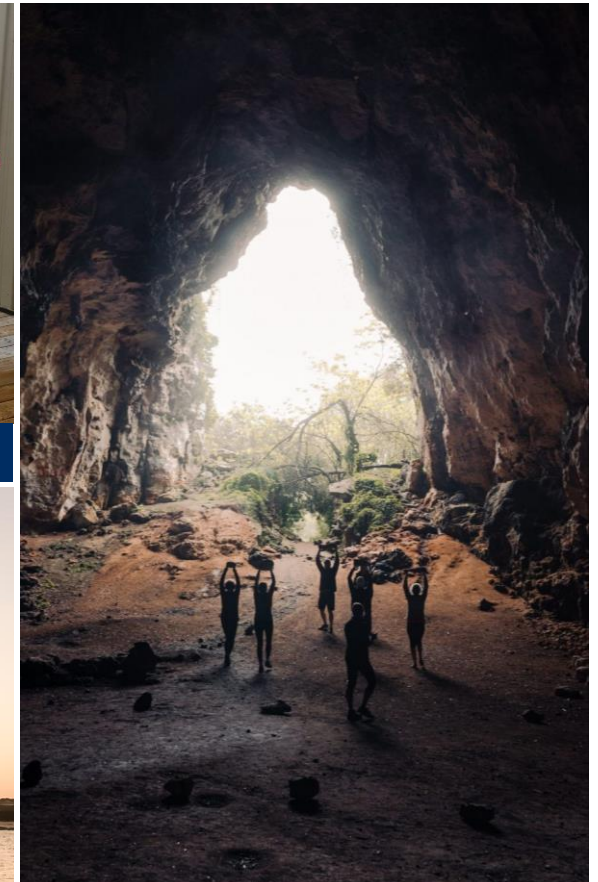
Northern bootcamp, The Bamburg beach



Pure Kauai, Hawaii



Club „La Santa“, Lanzarote



Wildfitness

#10 Organization of outdoor events

Concept

The initiative includes the organization of an internationally attractive outdoor event in Trebinje, in the pre- and post-season, with the key goal of raising the visibility of active holidays as a destination product on the international tourism market and diversification of the current offer of events within this destination. The organization is possible through two approaches :

- 1) organization in cooperation with a professional agency that owns the license of an internationally recognized branded event or
- 2) independent organization of events that already exist in the destination (with significantly higher investments and professionalization) or designing a new.

It should be noted that the organization of a branded event („buying events“) will have a much stronger impact on destination visibility with regard to the already built brand recognition (e.g. Red Bull, Ironman and similar competitions). However, the costs of organizing such an event are significantly higher, compared to self-organized events. Also, through the organization of an internationally recognized event, it is possible to create strong preconditions for co-branding activities and thus ensure the visibility of the destination over a longer period. For both options, it is necessary to consider the possibility of improving existing events within the destination (e.g. Trebinje Vertical), and the final decision on access must be made by destination participants according to the rank of aspirations and available budget. It is necessary to use the events so that through attractive experiences Trebinje is presented as a „stage“ on which it is possible to realize more types of adrenaline events and thus additionally attract fans of active holidays

Source: Horwath HTL, 2020.

Key success factors

1. Successful establishment of cooperation with a branded organizer
2. Providing sufficient financial resources for implementation
3. Conducting strong content-based marketing campaigns
4. Pre-season and post-season organization
5. Cooperation with local agencies and experts

Implementation holders

Key: Event organizer

Supporting: City of Trebinje, interested participants from the private sector

Indicative budget

200 - 300 thousand euros - an estimate based on events of the size of the Outdoor Festival Soča

#10 Organization of outdoor events

Examples for inspiration



Ultra Trail du Mont Blanc, Mont Blanc



Salomon Skyline, Scotland



Wings for Life, Zadar



Xterra World Championship



Olympus Marathon, Greece

#11 Program of cultural events - amphitheater

Concept

The amphitheater near „Hercegovačka Gračanica“ has been identified as one of the least used tourist resources within the destination. With its attractive location, the amphitheater has the potential to significantly improve the cultural offer of the destination, but also contribute to improving the marketing visibility of the destination. In this regard, it is necessary to design a program of cultural events that will take place in the summer of the high tourist season and increase the number of one-day visitors from the region. Some of the elements of the program that could be held in the amphitheater include the organization of musical performances and concerts, plays, historical festivals, philosophical debates, performances by stand-up comedians, poetry competitions, etc. By designing additional festivals, in addition to Music and More SummerFest events, you can get a larger influx of guests in not so attractive parts of the year. An important precondition for the quality design of the program of cultural events in the amphitheater implies the inclusion of all relevant participants in the destination area who, with their engagement and ideas, could positively influence the design of the events themselves. Thus, for example, various participants from the fields of art, music, film, history and gastronomy could be involved in the implementation of the program of cultural events, which would present the cultural offer of Trebinje in a comprehensive way. By establishing a program of cultural events in the amphitheater, the destination would significantly improve its recognizability of cultural offer, which would have a positive impact on attracting guests from nearby Dubrovnik.

Key success factors

1. Designing a creative program of cultural events
2. Disposition with sufficient financial resources to carry out the planned events
3. Integration and cooperation of all relevant participants of the destination
4. Quality organization of events in the amphitheatre
5. Designing and implementing a quality event promotion plan

Implementation holders

Key: TO Trebinje ; **Supporting :** Museum of Herzegovina, City of Trebinje, Cultural Center, Music School, Eparchy

Indicative budget

The budget depends on selected performers, independent organization or cooperation with professional agencies, therefore assessment is not possible

#11 Program of cultural events - amphitheater

Examples for inspiration



Ravello Music Festival, Ravello, Italy



International Festival of Ancient Greek Drama, Cyprus



Musical evenings at St. Donatus, Zadar



Ravello Music Festival



Musical evenings at St. Donatus, Zadar

#12 Improving the interpretation and conservation of cultural resources

Concept

A tour of the destination revealed that there are a number of tourist sites that are not adequately marked and do not offer a satisfactory level of interpretation. In order to address this shortcoming, it is necessary to improve the interpretation in order to present the cultural offer of the destination in a better way. The Museum of Herzegovina stands out as a special locality where the current interpretation of the exhibition is not acceptable because the inscriptions describing museum objects are poorly placed, written on paper, and often presented only in Serbian. The proposal goes in the direction of mandatory description of all objects in English and digitization, which would make the Museum more attractive to all visitors. Also, it is necessary to define the interpretive purpose of Golubarnik. Furthermore, within this destination, several localities have been identified that represent the rich cultural and historical heritage of the destination, but have been inadequately interpreted. Some of these sites include Arslanagića Bridge, Austro-Hungarian fortresses, Roman bridge Vučija, Brankovića kula, Mičevac fortress, and the old town of Klobuk. The initial step in the tourist valorization of these localities is their proper conservation, which would protect the historical value and increase the attractiveness, and thus the recognizability. After that, it is necessary to catalog the identified localities in order to unite and jointly present the cultural tourist offer. Finally, the interpretation of these localities must clearly represent the basic features in order to attract the interest of visitors. The preferred solution is digital interpretation and the involvement of visitors in consuming the experience.

Key success factors

1. Defining the operational model of destination cultural resources management
2. Conservation of cultural resources and creation of preconditions for tourist valorization
3. Designing a creative concept of interpretation of an individual locality
4. Marketing communication with the aim of raising the recognition of cultural localities of the destination
5. Regular maintenance of the materials used for interpretation

Implementation holders

Key: TO Trebinje, Museum of Herzegovina

Supporting: City of Trebinje

Indicative budget

Budget estimate is not possible, i.e., depends on the necessary interventions in each of the localities

#13 SOFISTICIZATION OF THE MARKET

Concept

Markets or places where local products are traded are recording a trend of increasing attendance by tourists and often become one of the main tourist attractions of the destination. Tourist products are increasingly being developed with the aim of increasing the integration of the local population into the consumption of experiences, so Trebinje should make better use of the market as a tourist potential in this. Therefore, the measure of sophistication of the market aims at infrastructural revitalization of the market on the one hand, and quality presentation of local products and meeting hygiene standards on the other hand.

Given that the interventions on the market building have already begun, one of the key activities going in the direction of infrastructural revitalization involves the introduction of specially designed and branded stalls that could be put away in the afternoon after the market is closed.

On the other hand, through the implementation of the closed market project it is necessary to enable adequate presentation of products indoors. In the context of the market, the greatest attention should be paid to increasing and ensuring better presentation of local products in a visually attractive way, which is closely correlated with infrastructure improvements

Although markets are an attractive tourist resource, after the implementation of all project activities (in the implementation and future), it is the local community and residents that will benefit from this initiative, which is in line with the overall philosophy of providing indigenous experience to guests

Source: Horwath HTL, 2020.

Key success factors

1. Defining the visual appearance of the market
2. Equipping the market with adequate equipment
3. Enabling the presentation of products even in bad weather, indoors
4. Integration and cooperation of local farmers and craftsmen to support the new concept of the market appearance
5. Maintaining a solid infrastructure and a high level of hygiene standards

Implementation holders

Key : City of Trebinje ; **Supporting :** TO Trebinje, Agrarian Fund, Agricultural Cluster “Old Herzegovina”

Indicative budget

The budget depends on the type and quantity of equipment with which the market will be equipped and it is necessary to determine it on the basis of a detailed project proposal.

#14 Sophistication and tourist activation of the Old Town

Concept

In view of its specifics, which include a rich cultural and historical heritage and traditional architecture, the Old Town of Trebinje (Kastel) identified as a significant tourist potential that at this time has not yet been fully valorized. In order to activate this part of the city for tourism, it is necessary to carry out a series of separate activities that will contribute to improving its attractiveness. The key participants of the destination have already recognized this potential. and in the process of implementation is a project with the implementation of which the Old Town will completely change the visual identity through extensive interventions in the space (paving, arrangement of moat, wall reconstruction, etc.). Some of the preconditions that must be taken into account for the successful realization of this goal is to ensure the visual harmonization of public spaces in the Old Town, which is planned to be achieved through an initiative within the DMO improvement. . Also, an important assumption is the arrangement of public areas within the walls in order to define locations for various events such as outdoor cinemas, music concerts, plays and the like. Furthermore, the sophistication of the Old Town would mean defining locations adequate for the demonstration of traditional crafts characteristic of Trebinje and Herzegovina. These crafts and activities are actually a key item of tourist activation of space aimed at showing the living culture of Trebinje in different historical periods. By implementing the initiative, the goal is to create a recognizable tourist attraction that complements the current tourist offer, but also sufficiently strong self-motivational factor for visits.

Key success factors

1. Implementation of the project of infrastructural revitalization of the Old Town
2. Visual harmonization of public spaces (facades, terraces of catering facilities, etc.)
3. Engagement and cooperation of the local population living and working within the walls of the Old Town
4. Designing a program of events throughout the year
5. Defining traditional crafts that will be demonstrated and providing support to craftsmen who will carry out this activity
6. The old town and the settlement of Krš have been declared a cultural monument of B&H and it is necessary to take this into account through investment

Implementation holders

Key : City of Trebinje

Supporting : TO Trebinje, Museum of Herzegovina

Indicative budget

More than 2.5 million euros for the project that is currently being implemented

#14 Sophistication and tourist activation of the Old Town

Examples for inspirations



San Gimignano, Italy, harmony of architecture and facades



Matera Italy , parasol harmony



Kotor , Montenegro , harmony of architecture



San Gimignano, Italy, main square



La Valletta, Malta , harmony of fasades and colours

#15 Digital Interpretation of fortresses

Concept

Austro-Hungarian fortresses located in the area of the destination represent an interesting tourist potential, but difficult accessibility and low level of conservation at this time prevent real tourist activation of these resources. Therefore, in the absence of meeting these basic prerequisites, this measure proposes a digital interpretation of fortresses in two ways: 1) using AR technology (AR augmented reality) at the locations of fortresses and 2) using VR technology (VR virtual reality) within the premises of the Museum of Herzegovina, for the interpretation of the historical heritage of the fortress. The main idea of the initiative is to create a new experience within this destination with the use of modern technology so that in the center of the settlement (Museum of Herzegovina) through virtual reality Trebinje is shown as a whole in various parts of history with special emphasis on architecture, appearance of settlements and fortresses. The location of the Museum was chosen with the intention of improving the offer and increasing the number of visitors, but also because of the location in the center of the historic center. The second component of the experience involves creating an application that will present virtual content to users using their own smart devices, during a tour of the fortress. For the realization of the second component, it is necessary to choose two to three fortresses with the best accessibility and ensure easy accessibility of the sites themselves, but also easy navigation with a simple "invention" to run virtual content. Facility must be fun and instructive (edutainment) at the same time, and therefore the motive of the visit for families with children, school groups, etc.

Key success factors

1. Engagement of professional staff (historians and archaeologists) with the aim of defining adequate facility for interpretation
2. Attractive and instructive facility of the interpretation of the fortress
3. Quality technological solution and procurement of appropriate equipment necessary for interpretation
4. Defining an adequate location from which digital interpretation can be used
5. Quality marketing communication of a new tourist attraction in this destination

Implementation holders

Key: Museum of Herzegovina

Supporting : TO Trebinje, City of Trebinje

Indicative budget

55 thousand euros (investment in the House of the Witch Mara), however, the budget can vary significantly according to the chosen concept

#15 Digital Interpretation of fortresses

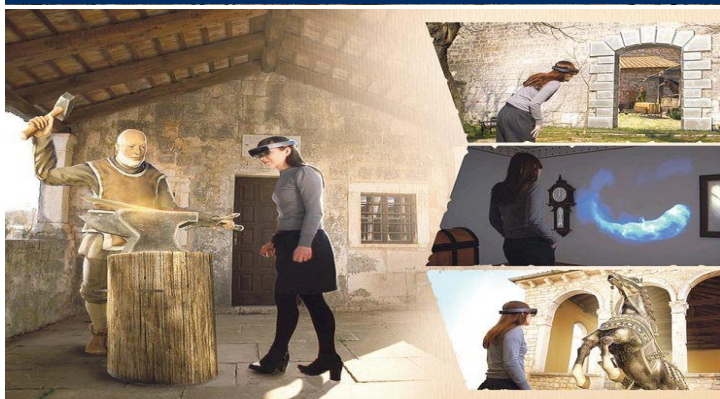
Examples for inspiration



Barone Fortress, Šibenik, use of AR technology



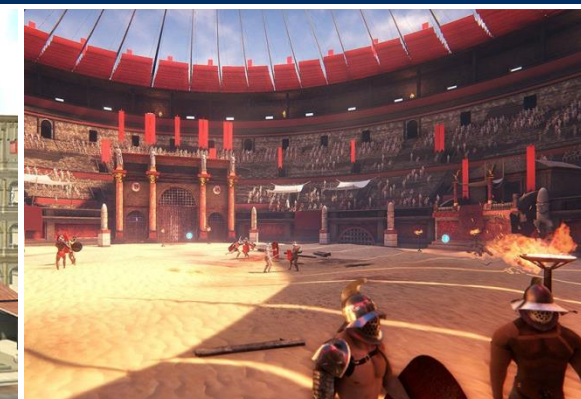
Barone Fortress, Šibenik, use of AR technology



Witch Mare's House, Vodnjan, Croatia



Colosseum, Rome, Italy, review of VR facility



Colosseum, Rome, Italy, review of VR facility

#16 Tourist activation of the Krš settlement

Concept

The settlement of Krš, which with its cultural and historical heritage represents the rich heritage of Trebinje, is currently in a rather ruined state. . Therefore, the main goal of this initiative is urban rehabilitation of the settlement to create an environmentally attractive whole. which will successfully develop various crafts, catering facilities, etc. . In this way, the settlement has the potential to become an attractive tourist locality that during the high season time could affect the concentration of tourists from the center, and to become an area in which it is possible on the one hand to interpret and on the other hand to experience the “ living culture” of Trebinje. The precondition for the implementation of the initiative is the development of a detailed regulatory plan in accordance with the legal provisions and requirements of the Republic Institute for the Protection of Cultural and Historical Heritage and the Commission to Preserve National Monuments of B&H. Urban rehabilitation is necessary to define infrastructural projects that will provide the settlement of Krš with the basic preconditions for tourist valorization. Such projects in the first place include providing basic infrastructure to residents of settlements, paving streets, renovation of houses, unification of facades, etc. The key holder of the implementation of this measure is the public sector, which is in charge of providing funds for the implementation of identified projects. The second component of this measure involves the identification of potential locations within the settlement that would be suitable for the opening of restaurants, craft shops, shops selling local products, etc. This would further emphasize the local character and authenticity of the destination.

Key success factors

1. Approval of funds for project implementation by the public sector
2. Development of a detailed regulatory plan for the settlement of Krš in accordance with the legal framework at the state and entity level.
3. Defining the visual concept of the settlement
4. Integration and cooperation of the local population living and working in the area of the settlement.
5. Defining the concept of activating the tourist offer of the settlement

Implementation holders

Key: City of Trebinje

Supporting: TO Trebinje, Museum of Herzegovina

Indicative budget

The budget cannot be estimated without a preliminary design

#17 Examining the possibilities of health tourism development

Concept

In the area of Trebinje, there is a strong interest in the development of health tourism by several private investors, and the main goal of this initiative is to examine the possibility and define the direction of health tourism development. The main step is to conduct research on the healing effects of living in the natural environment of Trebinje and scientific analyzes to prove the healing properties of the natural environment in terms of clean air and other positive effects on human health. Scientific analyzes should be used as a basis for encouraging investments in the development of health tourism and related accommodation facilities. Through research, it is necessary to identify several points where the natural environment of Trebinje provides the most health benefits and based on analysis to develop projects that will expand the offer of this tourist product including the period before and postseason. Positive findings of this research would further positively affect the positioning of Trebinje as a destination for healthy living and active vacation. It should be noted that health tourism is currently not recognized as one of the primary or secondary products given that before the investment cycle by private investors need to define natural prerequisites for product development. However, in the context of the future positioning of Trebinje as a destination of stationary tourism (in contrast to the previous transit model), the development of health products can be viewed as a basis for the stay of "third age " guests, i.e. upgrading existing initiatives to build homes and settlements for the elderly.

Key success factors

1. Professional research by specialized institutions
2. Exploitation of scientific analyzes for development purposes
3. Definition of a clear concept of valorization of the healing properties of nature
4. Designing additional content at the destination level
5. Development of high quality facilities for the care of the elderly and helpless persons

Implementation holders

Key: City of Trebinje ,private investors

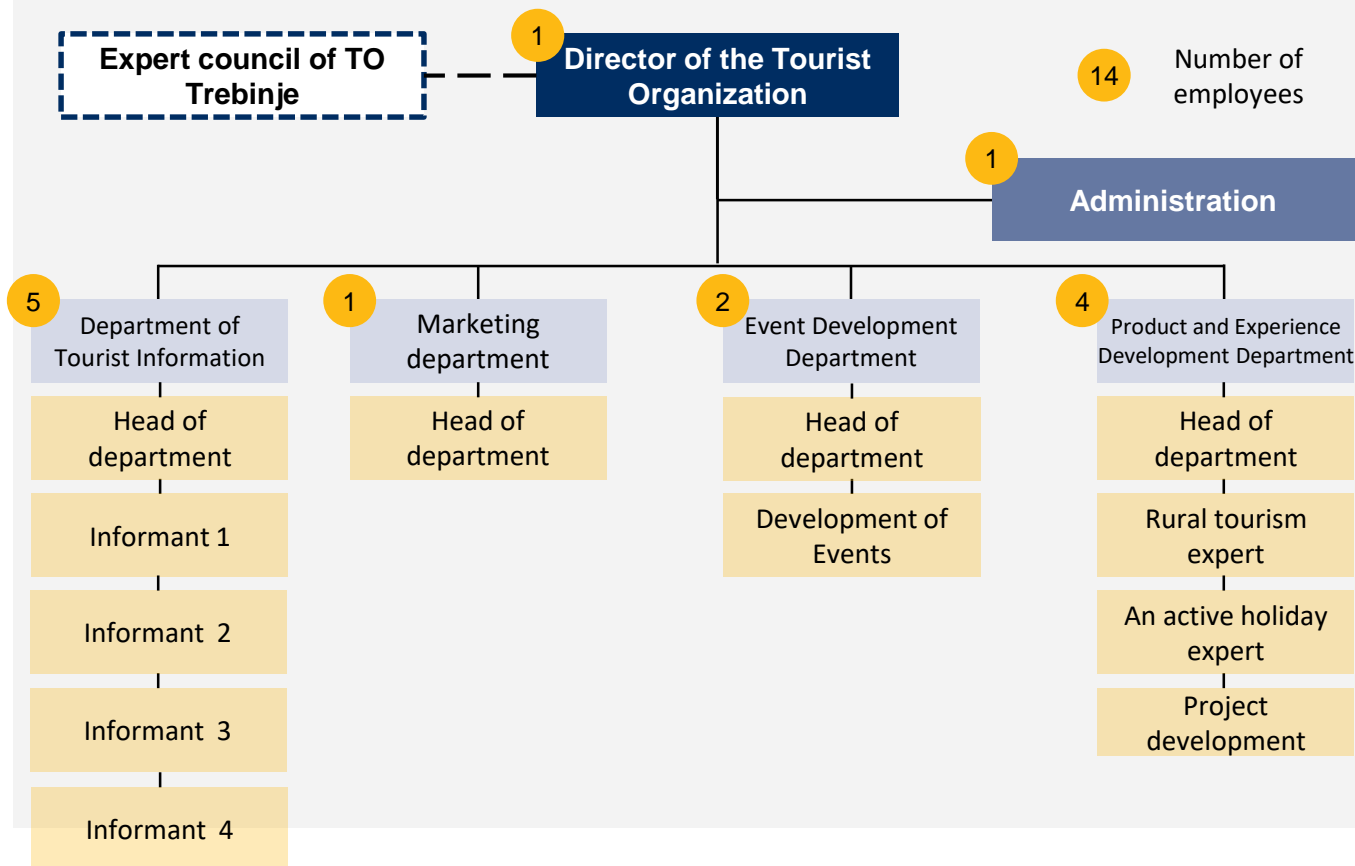
Indicative budget

Budget estimate is not possible

4.3. DMO IMPROVEMENT STRATEGY

Establishment of the organizational structure of the Tourist Organization of Trebinje

Proposal of a new organizational structure of TO Trebinje



The new organizational structure is proposed with regard to the operational needs of development and due to the need to start implementing the initiatives defined by the Strategy as soon as possible. It is also necessary to take into account how the organizational structure is proposed based on market requirements and the characteristics of Trebinje as a destination at the beginning of organized tourism development. . The primary condition for employment in the new organizational structure, and thus a prerequisite for the successful implementation of the system and the implementation of given initiatives are knowledge and quality of staff, and in the coming period it is necessary to focus on this component. Given that the legislation does not provide for the role of the private tourism sector in the management of the tourism organization, a key novelty in the proposed structure is the establishment of an Expert Council that will be a kind of platform for cooperation with the private sector.

Description of functions and departments in the organizational structure of the Tourist Organization of Trebinje (1/3)

Function	Roles and responsibilities	Communication
Director of the Tourist Organization	<ul style="list-style-type: none"> • Organization and management of the work and operations of the office • Representation of the Tourist Organization in legal and administrative terms • Encouraging synergy among destination participants in joint activities to improve product competitiveness, primarily through holding meetings of the Tourist Board, but also through specific agreed activities. • Employment of workers and assignment to jobs and proposing the structure and systematization of jobs of the Tourist Organization • Implementation of the work program of the Tourist Organization, the Tourism Development Strategy and other strategic documents • Representation of the Tourist Organization in media announcements and other market appearances • Active representation of the interests of the Tourist Organization before state bodies in order to achieve financial and other incentives • Performing other tasks determined by law, acts of the Tourist Organization and decisions of superior bodies 	<p>The City of Trebinje reports on the activities and results of the work.</p>
Administration	<ul style="list-style-type: none"> • Personnel, general, financial and bookkeeping operations • Keeping records determined by the Law and other regulations • Performing operations of receiving and sending mail, transcripts and duplication • Performing tasks of establishing and maintaining bookkeeping, and controlling the accuracy and data updating • Organizing proper liquidation of documents and accounting liability on the basis of personal expenses, material expenses and other grounds • Determining the legal correctness and calculation accuracy of documents on the basis of which payment orders are issued • Issuance of orders for payment of obligations according to the financial plan and on the basis of regulations and other acts • Control of proper calculation and payment of prescribed taxes and other benefits • Preparation of basic financial statements and proposals of the annual financial report • Participation in drafting proposals for funding documents in the coming period 	<p>About activities and results of work reports the Director of the Tourist Organization</p>

Description of functions and departments in the organizational structure of the Tourist Organization of Trebinje (2/3)

Function

Roles and responsibilities

Communication

Event Development Department

The key responsibility of the Department of Tourist Information is the management of tourist information centers in Trebinje. According to the proposed structure, it employs five employees - the head of the department and four informants, but with the condition of increased responsibility and the number of guides associated with the initiative Destination visitor flow management. The key roles and responsibilities are as follows:

- Supervision of reservation, check- in and check-out of guests, i.e., performing related check-in and check-out tasks (collection of residence tax, cooperation with inspectors for collection of tourist tax, etc. and supervision of the number of accommodation facilities
- Periodic analysis and reporting on tourist offer and demand within the destination
- Providing information on the tourist offer of the destination and distribution of propaganda material to tourists
- Communication with citizens of Trebinje and businesses on the obligations and rights and legal framework for catering services (private renters, restaurants, etc.
- Performing other tasks by order of the director of the Tourist Organization

It reports on the activities and results of its work to the **director of the Tourist Organization**

Marketing department

The Marketing Department is responsible for all TO marketing activities, in accordance with the Strategy and work programs. . With the precondition of the engagement of external experts, it employs one person with the following key roles and responsibilities :

- Operational cooperation with external partners (engaged marketing agencies „ outsourcing”) and control of results.
- Proposing and implementing innovative promotional campaigns and monitoring trends in the tourism market
- Supervision of destination brand communication and visibility of Trebinje in promotional campaigns in the tourism market
- Establishment of partnerships with participants from the private sector for the needs of marketing campaigns
- Development of an annual plan for printing promotional material and cooperation with external associates in the development (control and correction)
- Distribution of materials at tourist fairs and presentation of destinations at fairs
- Reception of journalists and organization of study trips (FAM - Familiarization Tour)
- In case the activities are performed without engaged professional marketing agencies “in house” , the key role is to independently carry out activities in cooperation with the director of the Tourist Organization.

It reports on the activities and results of its work to the **director of the Tourist Organization**

Description of functions and departments in the organizational structure of the Tourist Organization of Trebinje (3/3)

Function

Roles and responsibilities

Communication

Event Development Department

The Event Development Department has the main responsibility for evaluating and filtering existing, and designing and organizing new, innovative events, in cooperation with the Director of the Tourist Organization. According to the proposed structure, it employs two people. The key responsibilities are as follows:

- Research of events whose concept corresponds to the market positioning and experiences of Trebinje
- Proposal of concepts and content design in cooperation with the director of the Tourist Organization
- Building cooperation with destination participants in terms of organization and design of events
- Cooperation with specialized organizations and external associates on the organization of events
- Monitoring and evaluation of the success of organized events within the destination
- Communication with the media regarding organized events
- Participation in the development of annual plans related to the organization of events

It reports on the activities and results of its work to the **director of the Tourist Organization**

Product Development Department

The Product Development Department realizes its main responsibility through primary product development activities defined by the Strategy and participation in the implementation of project initiatives. According to the proposed structure, it employs four people, one of whom is the head of the department, two are product development experts, while the fourth employee is an expert in applying for development projects to funds at the national and international level. The key responsibilities are as follows:

- Preparation of project documentation for project applications to EU funds and funds at the state level
- Research of trends in the tourism market with the aim of implementation in the destination and innovation of the tourism product.
- Research of tangible and intangible heritage with the aim of valorization and creation of new destination experiences
- Cooperation with destination participants regarding the activities of development of tourist products and experiences
- Participation in designing concepts of new tourist attractions and modernization of existing ones
- Creating surveys of satisfaction of guests, population and tourist sector of the destination
- Forming a database of destination products, associates and business environment

It reports on the activities and results of its work to the **director of the Tourist Organization**

Establishment of the Expert Council of TO Trebinje

Concept

Expert Council TO Trebinje is a platform for cooperation of participants from the private tourism sector (restaurants, agencies, households, etc.) on the one hand, associations of citizens, institutions and organizations (e.g. Museum of Herzegovina, Mountaineering Association “Vučji zub”, Slow Food Convivium, Agricultural Cluster “Stara Hercegovina ”and others) on the other hand, and the Tourist Organization, i.e. representatives of the public sector on the other hand. The key idea is to improve mutual communication, achieve synergy in the implementation of various tourism development initiatives and a kind of “advisory role” of representatives of the Public Sector Council in further activities.

Since the legislation does not provide for the participation of private sector participants in the management of the Tourist Organization and there is no model for selecting participants of the Tourist Council according to the legal key, it is proposed to adjust the key according to activity. For example, the hotel sector may be represented by those participants who paid the highest sojourn taxes in the past year, restaurants by those representatives who pay the most taxes and similar.

For the sake of efficiency, the number of members should be limited and ensure the participation of participants with development ideas. Also, none of the activities should have an absolute majority in order to protect the interests of all activities of the tourism sector.), The key role of the Council will not be reflected in the supervision of TO activities (there is no legal possibility), but primarily through the advisory and cooperation function related to projects, TO activities and Trebinje tourism offer development initiatives.

Key activities

1. Define the model of election of members to the Expert Council of TO Trebinje
2. Establish communication with participants from the tourism sector and other organizations
3. Establish the Council operationally and hold its first session
4. Define the rules of procedure of the Council, representatives, the manner of convening sessions, etc.

Key success factors

1. Quality members of the Council with development orientation
2. Setting a clear vision and mission , i.e. the reasons for the existence of the Council
3. Regular meeting and constructiveness of members in the work of the Council
4. Coordination in the implementation of existing project ideas and the development of new initiatives in a clear way

#2 Destination visitor flow management

Concept

Trebinje is visited by a large number of one-day visitors during the main season, but due to the non-existent management system, crowds are created and the quality of the experience is impaired by guests. Therefore, in the coming period, it is necessary to design a model that will improve the management of the flow of visitors to Trebinje, and two alternatives are proposed :

1) Definition of the boarding and disembarking zone for tourist buses in the center where the space will be arranged, and then allow a short stay of buses for the needs of disembarking and boarding guests As an optimal location stands out Dositejeva street. The option includes arranging a location for a longer parking lot outside the center, where buses will stay while visitors tour Trebinje.

2) Arrangement of space for longer parking for buses outside the city center (but in the immediate vicinity) where the boarding and disembarking zone will be arranged at the same time. The optimal location is part of the parking lot next to the city park and MH Elektroprivreda due to the immediate vicinity of the center and the most frequent points of interest.

At selected locations, it is necessary to organize the reception of groups and tourist guidance by certified guides, and at the same time charge for parking and tourist guidance. Also, it includes the arrangement of toilets, covered areas (rain, sun), etc. Designing system "park and ride" for visitors is an additional long-term component, achievable in the next 10 to 15 years, through which the idea is contained to connect the city center with the parking lot for visitors in an innovative and environmentally sustainable way (bicycle sharing, e-bus, etc. connects the city center with parking for visitors and other points of interest.

Key activities

1. Choose between alternatives for the implementation of the initiative and reach a consensus of destination participants on the need for implementation
2. Prepare missing documentation for locations (spatial planning, construction, etc.) and provide financial resources
3. Provide a sufficient number of expert guides in cooperation with destination participants and start the implementation of the project
4. Develop a plan for the long-term development of the "Park & ride" system and initiate the necessary infrastructure interventions

Key success factors

1. Optimal location, convenience, quality of content, visual attractiveness and ambient harmony of the unloading and loading zone
2. Clear communication of the designed system with tour operators and agencies and the establishment of successful cooperation
3. Quality and professional staff involved in the interpretation of the destination and meeting the quantitative needs
4. Active further development of connectivity and availability of different points of interest of the destination in the coming period

#Destination visitor flow management

Examples for inspiration



Park & Ride, Ljubljana



Ljubljana cavalier, Ljubljana



Bike sharing system, Banja Luka



Park & Ride, Vienna



Drop-off – pick up point



Examples of modern concepts of “smart” stations and rest spaces

#3Unification of point of interest marking

Concept

The initiative implies conducting an analysis of the current tourist signalization and the definition and removal of invalid ones, and where it is necessary to introduce new traffic signs that are currently missing. Currently in the area of Trebinje, the existing system in some parts meets the needs of the tourist market and tourist information. However, while in some parts the signs are missing, at some intersections there are too many signs that are inconsistent with each other and their appearance confuses passers-by more than they meet the main goal, i.e. timely targeting of key points of interest and presentation of key tourist offer.

After the initial investment in the definition of the current situation and the need to invest in the renovation of existing and installation of new signalization, it needs to be continuously, annually revised, and adequately updated in accordance with changes within this destination. The initiative implies setting standards for marking tourist facilities in the city center (Old Town) and its surroundings in order to avoid visual inconsistencies. It is recommended that, according to examples of good practice, stone and a unique pattern of colors can be used in the marking of tourist destinations all in accordance with the destination key sales proposals. Also, through the set standards, it is necessary to define the appearance of terraces, awnings, tables and chairs within catering facilities and achieve visual harmonization of facilities, all with the aim of achieving a higher level of visitor satisfaction and ambient sophistication of Trebinje.

Key activities

1.

Carry out an analysis of the current state of brown signage and other systems of marking tourist points of interest

2.

Prepare documentation and create the design of marking points of interest and the appearance of terrace inventory of catering facilities

3.

Operationally implement new marking and design a model of support for caterers and remodeling of terraces

4.

Conduct a public call for caterers and establish a system to control the implementation of set standards

Key success factors

1.

Setting the signaling focus to key points of interest and avoiding excessive characters

2.

Regular maintenance of the signaling system with the addition of new markings as needed

3.

Consensus of the owners of catering facilities in the center of the settlement about the need to unify the appearance of the terraces

4.

Designing an attractive appearance of terraces and signs of catering facilities with the implementation of destination characteristics

#4 Trainings for providers of tourist and catering services

Concept

The initiative implies the organization and implementation of training for providers of tourist and catering services at the local level with the key idea of improving the quality of services provided and the development of business models of the tourist sector of Trebinje

The content of the training should focus on innovation and interactive communication with guests and it can be adapted to different target groups of the school, local population in urban and rural parts of the destination, creators of the tourist offer in all segments (food and drinks, travel agencies, attractions, Tourist organization, etc.

In addition to the organization of education, the Tourist Organization may encourage and / or organize visits of certain groups of service providers to examples of good practice at the international level. For example, it is possible to organize a visit to prominent rural households (family farms) engaged in tourism in Istra, and agritourism in Italy, with the aim of developing rural enogastronomy and rural tourism. According to a similar concept, it is possible to organize study trips for owners of small and family hotels, restaurants, etc. Also, it is possible to organize study trips for participants in destination management with the aim of acquiring new knowledge and getting acquainted with innovative approaches to destination management that are at a higher level of development of tourist offer and market recognition. In addition to the above, it should be noted that the overall challenge of professional understanding of the system needs to be addressed through the reform of the education system at the state / entity level.

Key activities

1. Establish cooperation with specialized educational institutions
2. Design the concept of education and provide funds for project implementation
3. Detect interested participants and establish communication
4. Conduct training and evaluate the success and satisfaction of participants

Key success factors

1. Quality content of education adapted to the specifics of the destination
2. Expressed interest of participants in the tourism sector and the realization of support from the entity and state level in the implementation of activities
3. Engagement of eminent experts from the tourism sector and organization of visits to prominent examples of good practice
4. Active implementation monitoring and objective performance evaluation

4.4. STRATEGIC MARKETING PLAN

5 key marketing goals of tourism in Trebinje for the next 10 years have been identified

Marketing goals

1

Affirm the destination as recognizable for the consumption of rural experience

With the development of rural tourism in the destination (ethno village, villas, holiday homes, agritourism, etc. it is necessary to increase the visibility of the destination through the prism of Mediterranean rural experience with the aim of establishing Trebinje as a recognizable destination of rural tourism located in the hinterland.

2

Focus marketing activities on attracting tourists from Dubrovnik and the northern Montenegrin coast

Given the large number of tourists visiting these areas, the goal of focused marketing activities is to cover certain market segments to increase the number of visitors from the area, especially in pre-season and post-season.

3

Positioning itself as one of the leading active tourism destinations in Bosnia and Herzegovina

Existing tourist resources in combination with the proposed measures for the development of active tourism create a strong basis for positioning Trebinje as one of the leading active tourism destinations in Bosnia and Herzegovina.

4

Put more focus on the promotion and branding of the destination through the prism of wine tourism

Wine tourism has been identified as one of the initiators of tourism development of the destination, and as today a strong lever of destination tourism, it is necessary to focus marketing activities to promote Trebinje and its surroundings as an attractive wine regions.

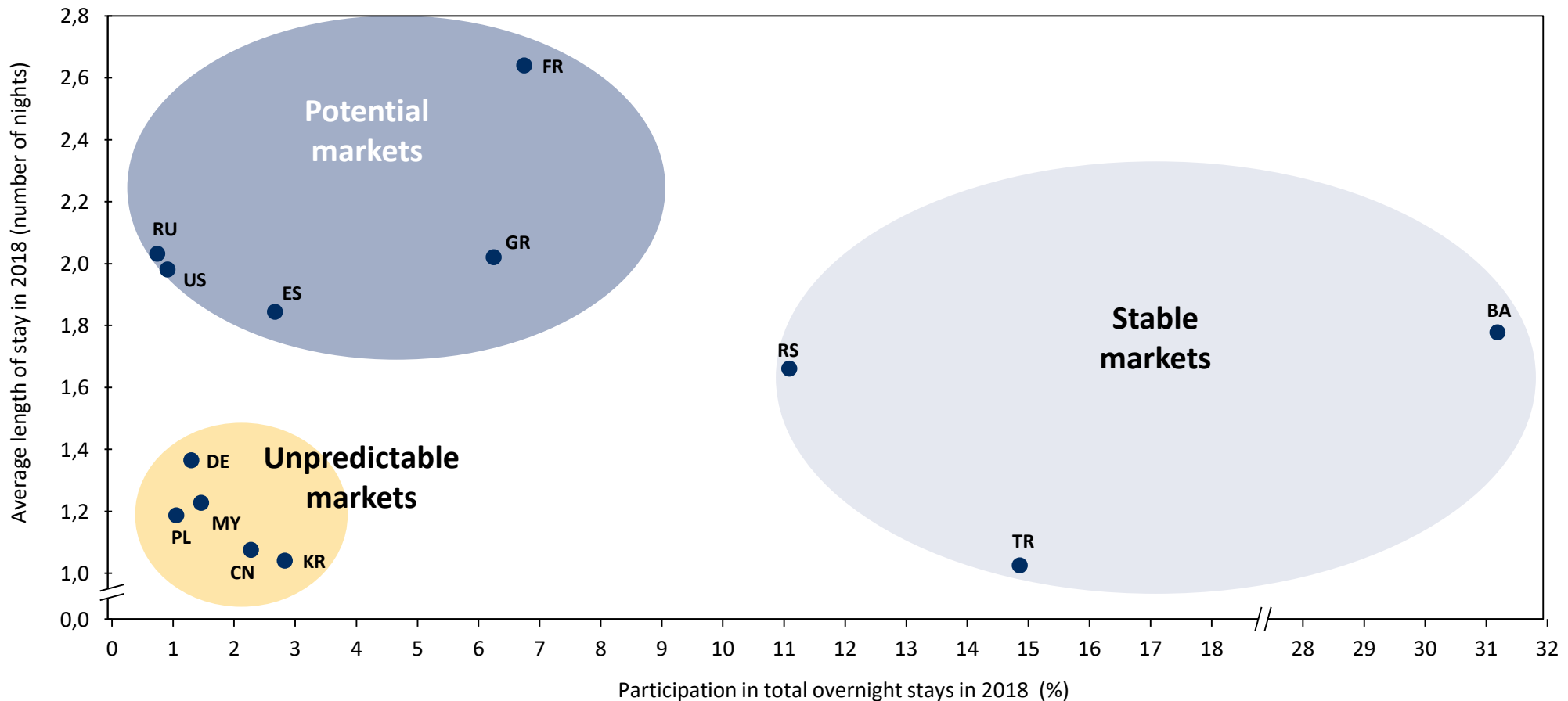
5

Creating a strong brand „Herzeg house“ and raising its recognizability

Herzeg house is currently the most recognizable product of the destination and as such it needs additional support to develop into a trademark of Trebinje which will make the destination more recognizable in the tourist market.

Three market groups that require separate marketing treatment have been defined

Prioritization of emitting markets



Source: TO Trebinje , Horwath HTL, 2020.

* AU=Australia, BA=Bosnia and Herzegovina, CN=China, DE=Germany , ES=Spain , GR=Greece , FR=France, KR=Korea , ME=Montenegro, MY=Malaysia, PL=Poland , RH=Croatia, RS=Serbia , RU=Russia, TR=Turkey , US= USA

Most of the focus of marketing activities needs to be focused on activating and attracting potential markets

Stable markets

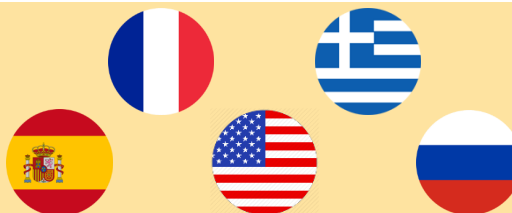


3 countries with a double-digit share (of more of 10 %) in total overnight stays in 2018 have been singled out as stable markets:

- Serbia
- Bosnia and Herzegovina
- Turkey.

These markets do not require as much marketing attention as it will come to the destination by inertia. At the moment, the average overnight stay of visitors from these markets is below two nights, so there is room for improvement in this segment.

Potential markets

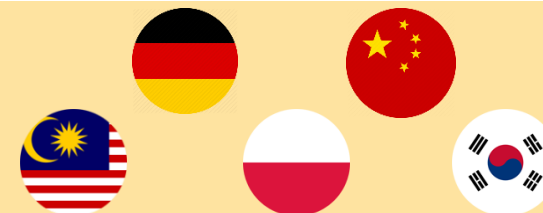


Although smaller in size, markets with an increased length of stay in the destination (around and above 2 nights) have been identified as potential and should be the focus of most marketing activities. Preferred markets include the following countries:

- France
- Greece
- Spain
- United States of America
- Russia.

For each of the markets it is necessary to define a specific marketing model of accession.

Unpredictable markets



Markets that achieve a low volume of overnight stays and do not stay too long in the destination are recognized as unpredictable markets and include the following countries:

- Germany
- China
- Malaysia
- Poland
- Korea

Given the projected development of high value rural tourism, the German market has the potential to become potential in a short period of time.

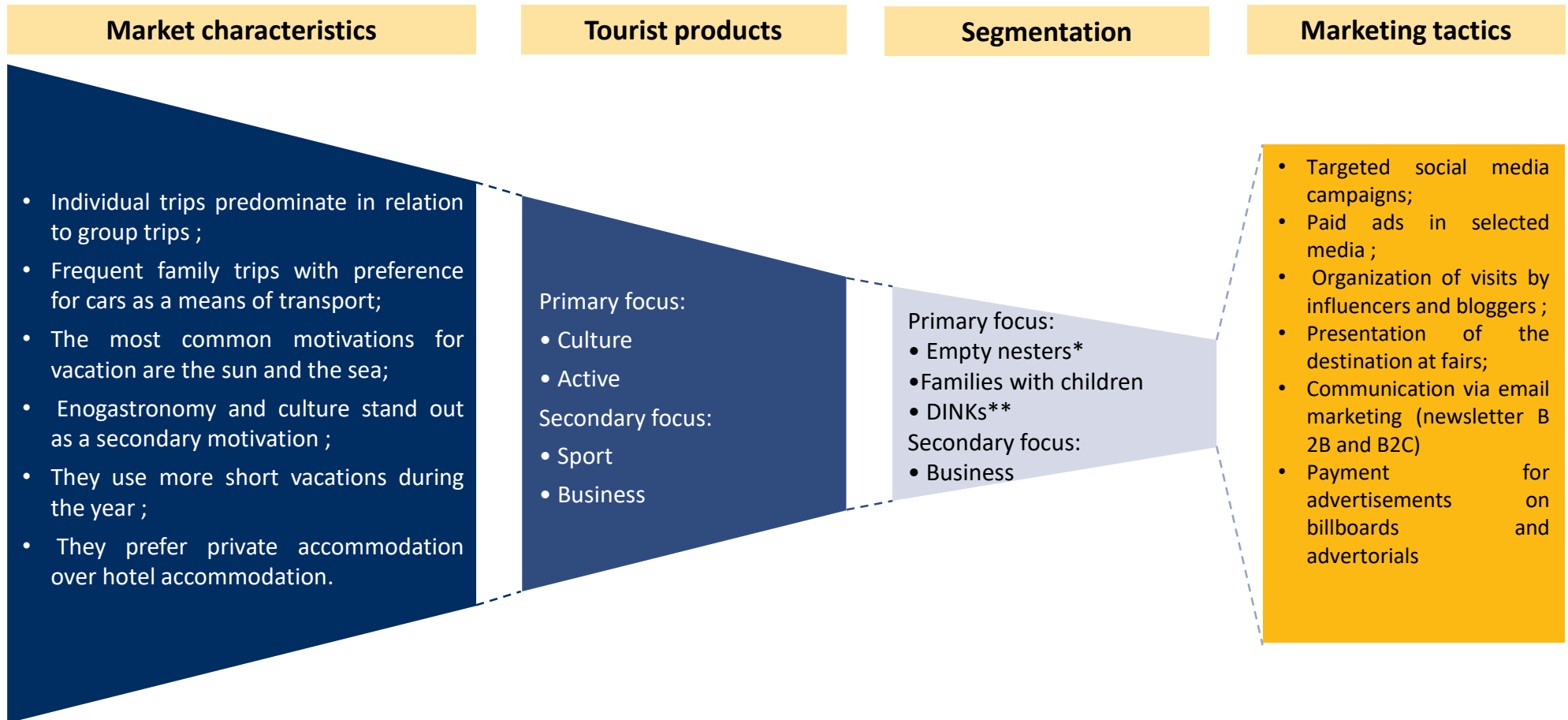
New markets



Scandinavian countries

Given the development of tourist products in the destination, part of the marketing activities should be directed towards markets that currently realize less than 1 % night, but their profile corresponds to the new offer of the destination. New markets include Belgium, the Netherlands and the Scandinavian countries.

Marketing model of access to the markets of Serbia and Bosnia and Herzegovina

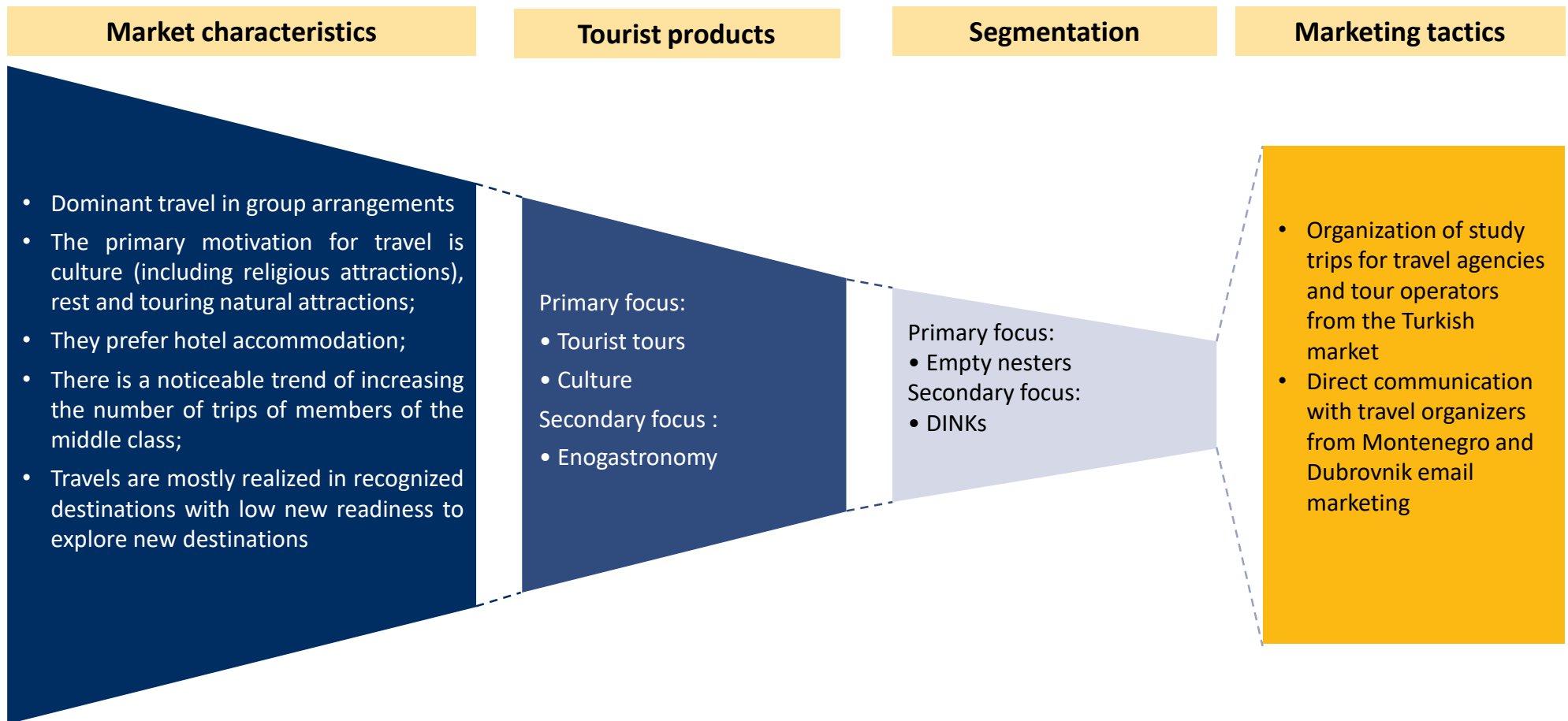


Source: Horwath HTL, 2020., *Empty nesters , working people whose children have left the parent's home and live independently;

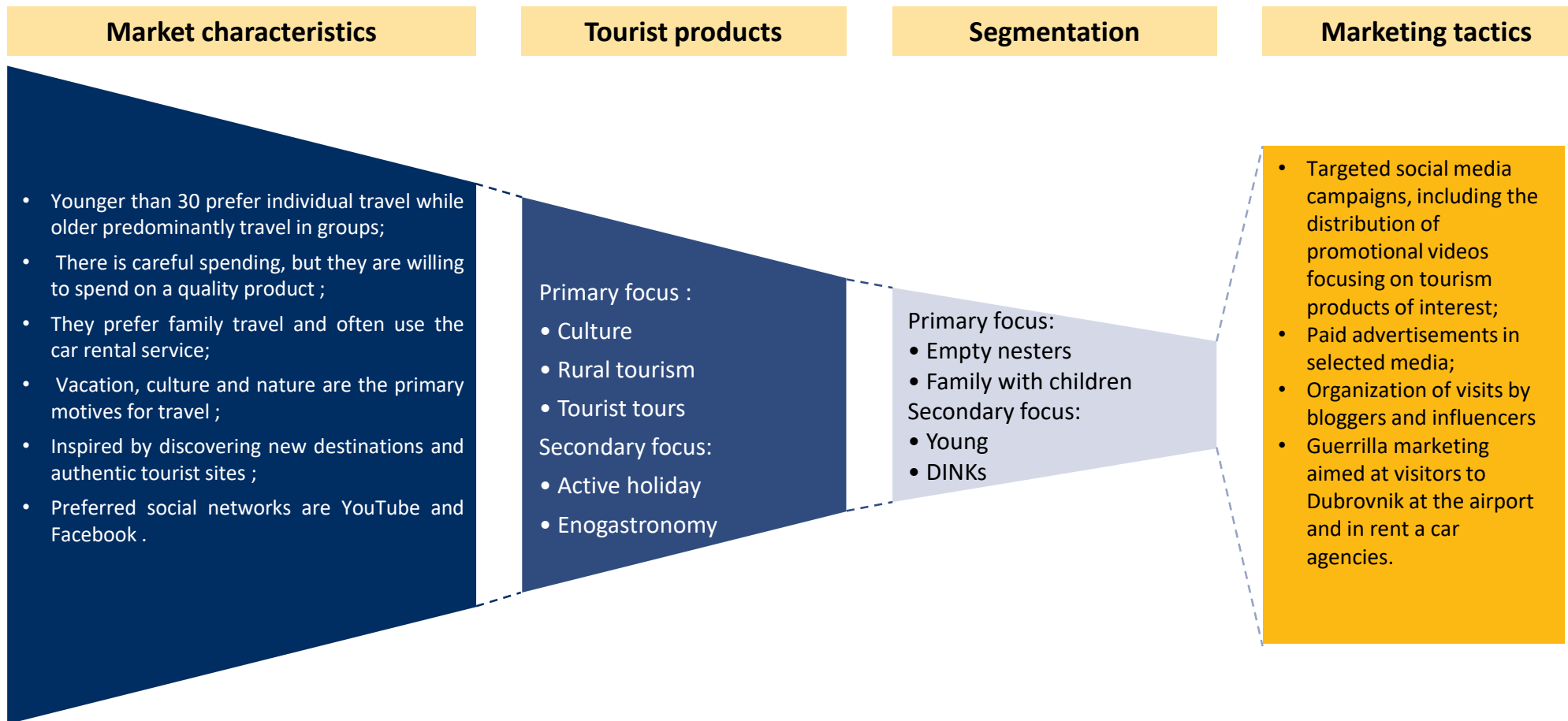
** DINKs-ehg. Double Income No Kids



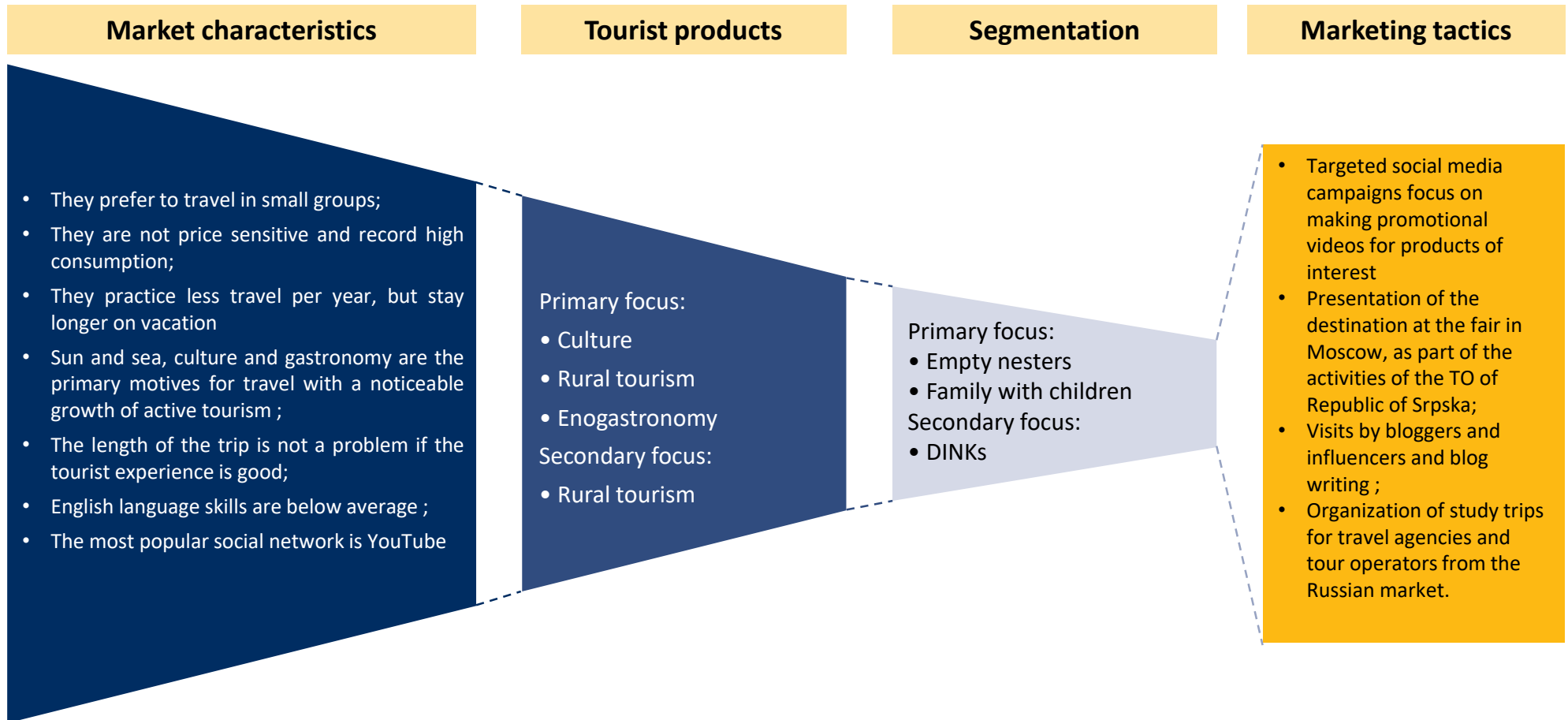
Marketing model of Turkish market access



Marketing model of access to the markets of Spain and France

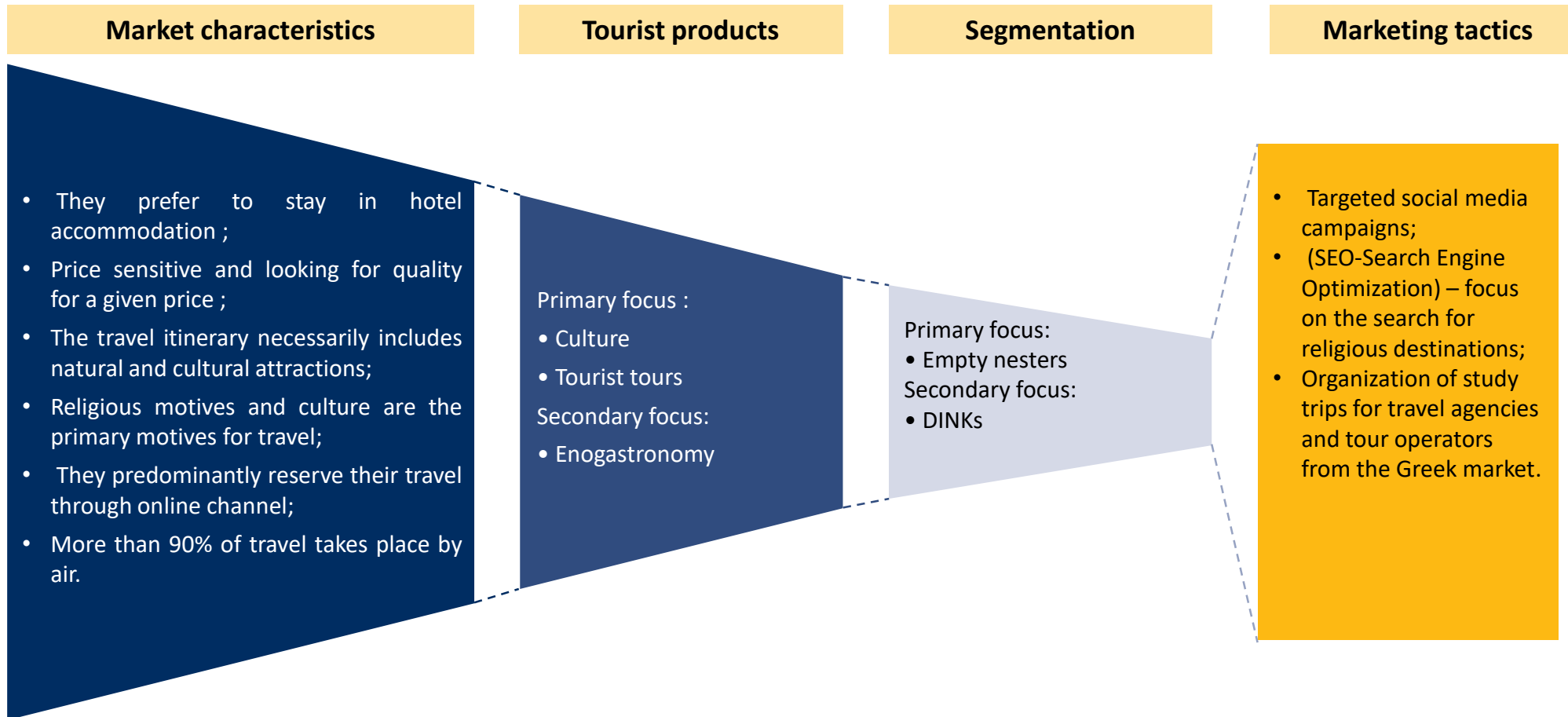


Marketing model of market access in Russia

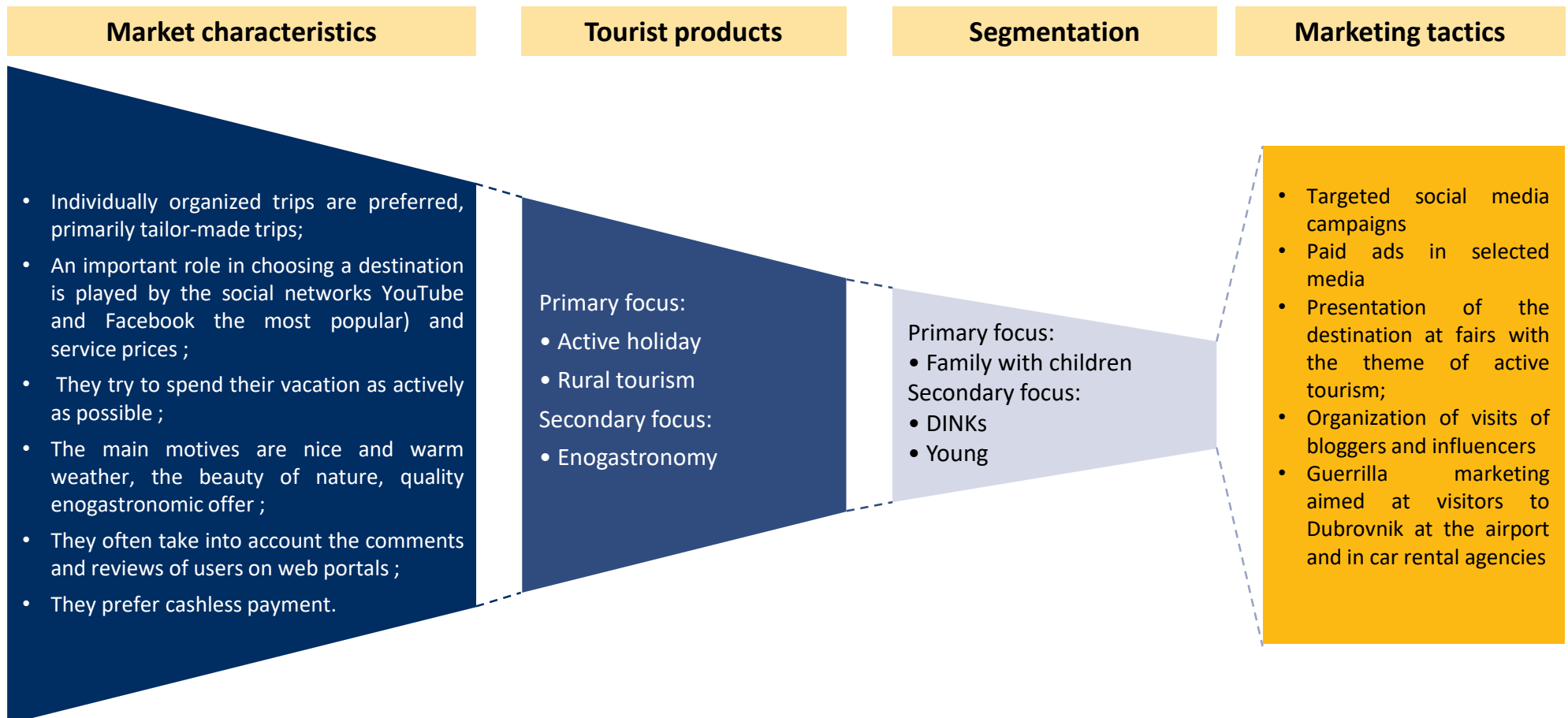




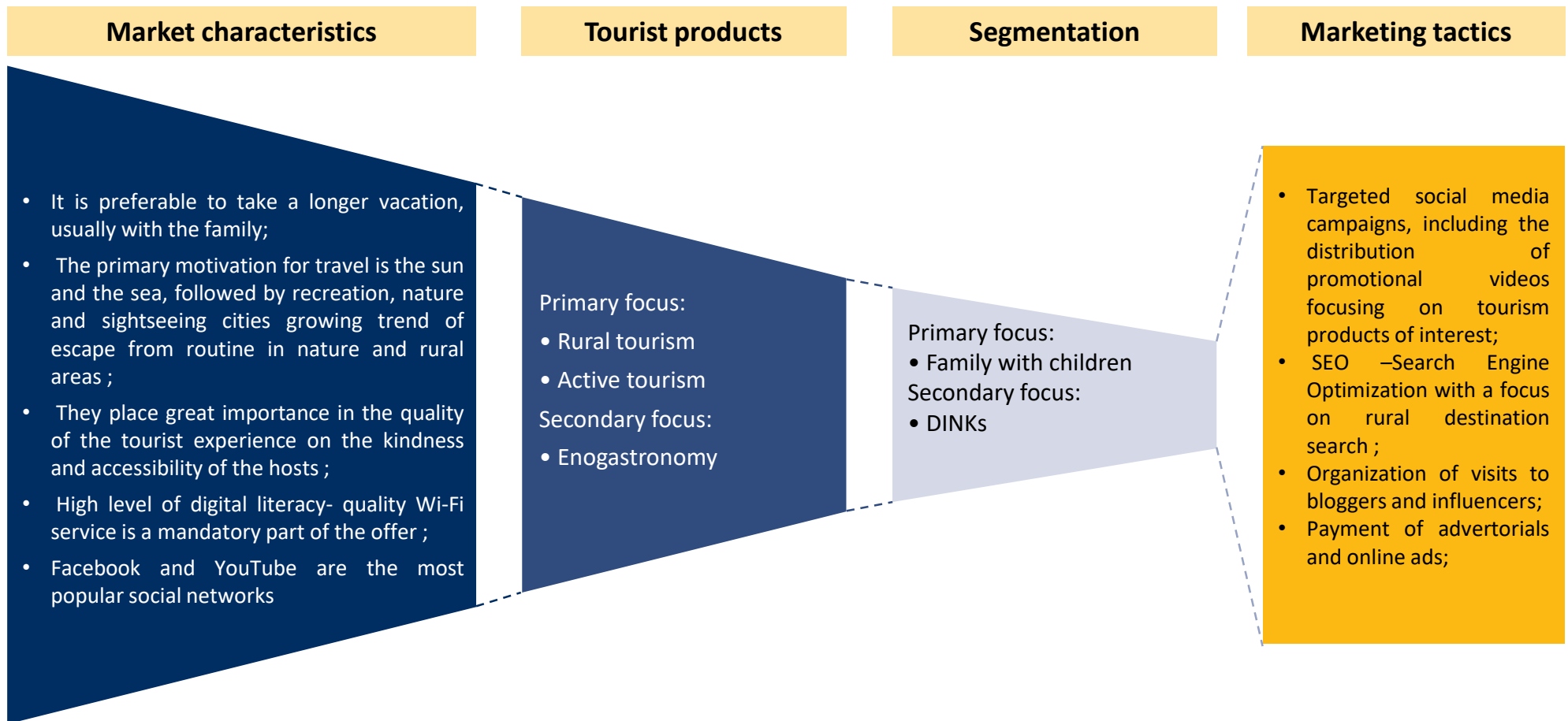
Marketing model of Greek market access



Marketing model of access to the markets of Belgium and the Netherlands



Marketing model of access to the markets of the Scandinavian countries Norway, Denmark and Sweden



Empty nesters have been identified as one of the main market segments to focus on marketing activities

Empty nesters



Desirable communication channels

- Direct marketing and sales channels
- Digital channels

Desirable tourist products

- *Touring*
- Culture
- Enogastronomy
- Rural tourism

Key motives

- Cultural and historical attractions
- Diverse and high quality gastronomy

Age

- 45 - 55

Budget

- High

Travel time

- All year round

Emotional factors

- Inspirational and authentic tourist experiences
- Exploring new cultures and destinations

Given the local character of the destination, which presents relaxation and comfort, it is necessary to design a special campaign for this market segment.

DINKs (енг. *Double income no kids*)



Desirable communication channels

- Digital channels
- Offline channels
- Direct marketing and sales channels

Desirable tourist products

- Active holiday
- Enogastronomy
- Culture

Key motives

- Pleasant atmosphere and ambience
- Exciting events
- Creative local cuisine with authentic expression

Age

- 25 - 49

Budget

- Above average to high

Emotional factors

- Change of routine
- Carefree enjoyment of the holiday

Travel time

- All year round

Rural and active tourism stand out as two dominant tourism products intended for this market segment

Family with children



Desirable communication channels

- Digital channels
- Offline channels

Desirable tourist products

- Active tourism
- Rural tourism

Key motives

- Experiences tailored to children
- Safety
- Fresh air and cleanliness

Age

- Children up to 18 years with parents between 30 and 45

Budget

- Average to above average

Travel time

- Dominant in summer and winter

Emotional factors

- Spending quality time with children

The criterion of quality and price could be a strong motivating factor for attracting young people to the destination

Young



Age	<ul style="list-style-type: none"> • 15 - 25 	Desirable communication channels	<ul style="list-style-type: none"> • Digital channels
Budget	<ul style="list-style-type: none"> • Average to above average 	Desirable tourist products	<ul style="list-style-type: none"> • Enogastronomy • Active holiday • Events
Travel time	<ul style="list-style-type: none"> • All year round 	Key motives	<ul style="list-style-type: none"> • Entertainment and nightlife • Value for money and easy accessibility
		Emotional factors	<ul style="list-style-type: none"> • Enjoying life to the maximum • Meeting new people • Contributing to sustainability

The focus of marketing activities on business guests is exclusively based on the wider region

Business



Age

- 25 - 65

Budget

- High

Travel time

- Preseason and postseason

Desirable communication channels

- Direct marketing and sales channels
- Digital channels

Desirable tourist products

- MICE (Congress tourism)

Key motives

- Business meetings and conferences

Emotional factors

- Travel comfort and high service expectations
- Exploring new leisure destinations

Guidelines for marketing activities (1/2)

1) Operational marketing plan of tourism and branding plan

- Operational marketing plan of tourism and branding plan needs to define in a more detailed level further steps in the marketing performance of Trebinje on the tourist market and at the tactical level to design types of campaigns to be implemented, in which markets, in which time period, for which segments of demand, etc.
- Also, it is necessary to answer the question of the need to design a new brand or focus on “refreshing” existing with a definition of clear brand architecture, brand essence and other basic elements of the brand.
- Through making plans, it is necessary to pay special attention to the harmonization of marketing activities of TO Trebinje and TO Republic of Srpska.

2) Professionalization of digital communication channel management

- Professionalization of digital communication channel management system means making a decision on conducting digital promotional activities without the involvement of external associates or with their engagement (“in house” or “outsourcing”) in the next time period.
- The recommendation is outsourcing (Eng. external services), i.e. the engagement of a professional marketing agency with the precondition of defining a communication strategy which will set clear indicators of cooperation success, goals to be achieved through marketing campaigns, but also the tone of communication, content through various channels, etc.
- In case of a decision to perform marketing activities without the involvement of external associates, it is necessary to ensure a sufficient level of expertise of the responsible person and control the success of the activities based on the same indicators that would be set to evaluate the quality of outsourcing.

3) Promotion in the area of Dubrovnik and northern Montenegrin coast

- The main focus of the guideline is the definition of marketing activities that will effectively attract visitors from Dubrovnik and destinations in Montenegro to visit Trebinje. . . Primarily, it is necessary to establish communication and cooperation with the competent authorities in the area of Dubrovnik and Herceg Novi and to agree on the activities that are planned to be carried out.
- Some of the potential marketing tactics include guerrilla marketing in frequent locations such as airports and places to pick up cars from car rental agencies (placing flyers in rental cars, etc., using offline channels such as billboards, but also social networks, etc.

Guidelines for marketing activities (2/2)

4) Innovation of marketing activities

- The modern tourist market implies strong visibility of the destination on online channels and “competition” in creative ideas for the promotion of tourist products and experiences at the destination level
- Also, the focus of marketing activities on digital marketing includes reducing the number of fairs in which TO Trebinje participates and the selection of specialized fairs that are in line with the primary and secondary tourism products of Trebinje.
- Some of the activities that include the improvement of digital marketing are the design and implementation of innovative campaigns on social networks, timely modernization of the website, development of practical applications, etc.

5) Multimedia bank

- The guideline implies the creation of a multimedia bank in cooperation with professional marketing agencies and individuals or companies dealing with the field of photography, video, written tourist texts, etc.
- Considering that in the case of Trebinje it is evident that professionally made photographs are mostly used for the needs of the website (with the exception of a certain number of amateur works of lower quality), the idea is to focus on quality video materials in the coming period.
- Today, video is one of the key and most used tools of tourism marketing, so it is necessary to devise a concept and produce unique promotional videos that will adequately represent the basic features of each product. The videos created in this way can be adapted to social networks by shortening the duration and raising the dynamism, all with the aim of attracting the attention of viewers in a short period of time (up to a few seconds).

6) Tourist ambassadors of Trebinje

- Given the large number of recognizable personalities who were born or have a strong connection with Trebinje, it is necessary to use their media exposure in order to raise the level of visibility of the destination.
- Some of the tasks of the selected ambassadors include the promotion of the destination through social networks, the publication of attractive content, and in the case of sports personalities, the organization of sports events that will be promoted and visited by the selected ambassadors.

4.5. SUPPORTING FACTORS FOR TOURISM DEVELOPMENT

Significant progress is possible by influencing the supporting factors of tourism development, but the realization requires a consensus at the state level

Supporting development initiatives have the potential to significantly raise the level of attractiveness and competitiveness of the tourist product of Trebinje, however, their implementation is possible only with consensus at the level of Republic of Srpska and / or Bosnia and Herzegovina. Also, the realization of a certain part of the initiative is not the sole responsibility of participants related to tourism, and in that context it is necessary to point out the needs of the tourism sector and the development potential of Trebinje and other tourist destinations at the state level.

#1 Legal regulation of the destination management system

The current destination management system needs to be significantly modernized and reorganized. Therefore, at the national level it is necessary to make a decision on a new, improved legal regulation of the system. This implies increasing business transparency, providing greater powers to the private sector in the supervision and management of the system, modernization of TO activities through restructuring according to the model of destination management organizations (DMO) and establishing system cooperation on top down/ bottom-up basis.

#3 Education in the field of tourism and catering

The analysis of the tourist value chain defines the level of professionalism of the workforce in tourism as one of the most deficient categories of the tourist offer of Trebinje. The solution to this problem lies in the reform of the education system that needs to be implemented at the state level. Although tourism is only one of the affected activities, as a particularly labor-intensive activity, it deserves special attention and consultation with private sector participants to present key shortcomings and market needs in the next period.

#2 Improving the system of tourist statistics and supervision of activities

According to the state of supervision and monitoring of the tourist offer and traffic in Trebinje, the assessment is that at the state level there is a lack of an efficient system of tourist statistics and supervision of the activities. Improving the system is possible through two approaches: 1) introduction of greater controls on the existing measurement model and 2) introduction of a digital solution for registration and deregistration of accommodation capacities and tourist traffic and introduction of more efficient control mechanisms. Improvement of the system is necessary given the impossibility of managing the tourism sector without accurate data.

#4 Renewal of traffic infrastructure

Local authorities have the possibility to influence the quality of traffic infrastructure only in their own areas, and in the area of Trebinje the stated component (with exceptions) is at a satisfactory level. But the quality of roads connecting Trebinje with other parts, B&H, Montenegro and Serbia, is not at a satisfactory level and significant investments are needed in this segment in the coming period in order to create conditions for stronger tourism in Trebinje. The local government in Trebinje has the task of advocating the implementation of these projects at the state level.



5. Action plan

Basic assumptions of the elaboration and items of the action plan

- The dynamics of elaboration of the action plan for the implementation of the initiative is based on the conditional and theoretical assumptions of the current circumstances and the allocation of priorities defined in cooperation with the participants in interactive strategic workshops.
- The actual dynamics of the implementation of initiatives will largely depend on the financial priorities of the City of Trebinje and the Tourist Organization through whose budgets the action plan is operationalized on an annual basis
- In this context, the action plan should be viewed as a summary of the initiatives defined by the Strategy and should be operationally adapted to changed circumstances (internal and external).
- As a key external circumstance that needs to be addressed in the coming period, the availability of financial resources from various funds at the national and international level is emphasized. In this context, it is necessary to prepare projects and actively participate in the competition for funding.
- On the other hand, a certain part of the project implies the establishment of partnership and / or cooperation with participants from the private sector. To this end, the task of the public sector is to prepare projects to the extent possible (resolved land ownership, spatial plans, designed model of cooperation for a proposal to a private investor, etc. and with a certain level of flexibility in cooperation, implement planned projects and achieve strategic goals.
- Due to the Covid 19 crisis, the number of implementation activities during 2020 has been minimized and mainly reduced to activities that do not require significant implementation budgets.

In addition to the name of the initiative, the action plan contains the following items :

Body responsible for implementation :

- The action plan for investment strategy, competitiveness strategy and DMO improvement strategy shows only key stakeholders, while the implementation of the strategic marketing plan is the responsibility of the Tourist Organization.

Budget Estimation :

- Budgets are estimated for initiatives that are possible based on field findings, case studies, and Horwath HTL experience from previous projects, but final amounts can vary significantly based on detailed planning.

Implementation dynamics :

- Implementation dynamics implies the definition of the time frame for undertaking key activities for the implementation of a particular initiative and is based on optimal assumptions from today's perspective . Given the longer period of implementation of the Strategy, changes in internal and external conditions are likely and therefore the plan needs to be adjusted according to the circumstances at a given time in the future.

Quantitative and qualitative implementation indicators:

- Quantitative and qualitative implementation indicators have been developed with the aim of monitoring the implementation of individual initiatives as easily as possible, and the target quantitative values should be determined in accordance with the aspirations of the participants.

DMO Improvement Strategy

#	Initiative	Body responsible for implementation	Implementation dynamics																								Quantitative and qualitative indicators of implementation																				
			2020.				2021.				2022.				2023.				2024.				2025.					2026.				2027.				2028.				2029.				2030.			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4				
ESTABLISHING THE ORGANIZATIONAL STRUCTURE OF TO TREBINJE																											1. New organizational structure established - Yes / no, 2. Employee satisfaction, 3. Customer satisfaction																				
Achieve consensus of the involved participants on the need to establish a new organizational structure																											Yes/no																				
Conduct an objective analysis of employees and make a decision on the need for dismissal / employment																											Yes/no																				
Operationally carry out the reconstruction of the organizational structure and assign new responsibilities to employees																											Yes/no																				
Establish a clear model for evaluating the work of employees and conduct an evaluation																											Yes/no																				
Conduct education and training in areas with the greatest lack of capacity																											1. Number of conducted educations and trainings, 2. Satisfaction of employees																				
1. ESTABLISHMENT OF TO TREBINJE EXPERT COUNCIL																											1. Expert Council established - Yes / No, 2. Number of members, 3. Number of meetings held, 4. Number of implemented Council initiatives, 5. Satisfaction of members																				
Define the model for electing members to the Expert Council of TO Trebinje																											Yes/no																				
Establish communication with participants in the tourism sector and other organizations																											Yes/no																				
Operationally establish the Council and hold the first session																											Yes/no																				
Defining the business plan of the councils, representatives, the manner of convening the meetings and etc.																											Yes/no																				
Hold sessions regularly																											Number of sessions held																				
2. DESTINATION VISITOR FLOW MANAGEMENT																											1. Implemented management system - Yes / no, 2. Satisfaction of the population, 3. Satisfaction of visitors																				
Choose between alternatives for the implementation of the initiative and reach a consensus of destination participants on the need for implementation																											Yes/no																				
Define key locations for the establishment of the system and implementation of project components																											Yes/no																				
Prepare the missing documentation (spatial planning, executive, etc.) and ensure financial resources																											Yes/no																				
Carry out the necessary interventions in the space																											Yes/no																				
Provide a sufficient number of expert guides in cooperation with destination participants and start the implementation of the project																											Yes/no																				
Set clear guidelines for evaluating the success of implementation and conduct an evaluation																											Yes/no																				
3. UNIFICATION OF THE POINT OF INTEREST MARKING SYSTEM																											1. New brown signage installed - Yes/no, 2. Visually uniform exterior parts of catering facilities at defined locations - Yes /no.																				
Carry out an analysis of the current state of brown signalization and other systems of marking tourist points of interest																											Yes/no																				
Prepare documentation, create design of marking points of interest and terrace inventory of catering facilities																											Yes/no																				
Operationally implement new marking and design a model of incentives for caterers and remodeling of terraces																											1. Brown signaling restored -Yes/no 2. Designed incentive model for caterers - Yes/no																				
Conduct a public call for caterers and redecorate the space																											1. Number of incentive beneficiaries , 2. Premises renovated																				
Establish a system of control and supervision of compliance with standards and carry out control																											Yes/no																				
4. EDUCATION FOR PROVIDERS OF TOURIST AND CATERING SERVICES																											1. Education system designed - Yes / no, 2. Number of workshops held 3. Number of users, 4. Number of organized visits to examples of good practice																				
Establish cooperation with specialized educational institutions																											Yes/no																				
Design the concept of education and provide funds for project implementation																											Yes/no																				
Detect interested participants and establish communication																											Yes/no																				
Conduct trainings and evaluate the success and satisfaction of participants																											Number of interested participants																				
																											Yes/no																				



6. Attachments

List of immovable cultural assets of Trebinje (1)

The list of immovable cultural assets in the Republic of Srpska is composed of assets from the National List of Monuments of B&H and assets that have a valorization basis in accordance with the Law on Cultural Assets of the Republic of Srpska. In the columns on the right, the species to which the cultural property belongs is marked:

National list of monuments of Bosnia and Herzegovina

1. historical buildings and monuments
2. architectural units
3. areas

Assets that have a valorization basis

4. cultural monuments
5. archaeological sites (only those that are on the National List of Monuments or in the Register of SR B&H)
6. spatial cultural and historical units
7. famous places

If the cultural property is in the Register of SR B&H, and the type to which it belongs has not been determined, it is noted in the column National List of Monuments

Tables with the list of immovable cultural assets in Trebinje are on the following page.

List of immovable cultural assets of Trebinje (2)

#	ID	Name of cultural monument	National List of monuments			Other cultural assets			
			1	2	3	4	5	6	7
1.	NKD599	Ambient ethno whole, Uvjeća							X
2.	NKD600	Arslanagića Bridge	X					X	
3.	NKD601	Villa Lastva							X
4.	NKD602	Gymnasium							X
5.	NKD603	Gradina , Varina Gruda, Dživar			X		X		
6.	NKD604	Tomb church of Konstantinović with yard and cemetery						X	
7.	NKD605	Chapel of St. Dimitrije, Klobuk							X
8.	NKD606	Cathedral Church dedicated to the birth of the Blessed Virgin Mary-Mala Gospa in Trebinje		X					
9.	NKD607	Duži Monastery, Duži						X	
10.	NKD608	Monastery of St.George, Brvenik, Zupci							X
11.	NKD609	Tvrdoš Monastery , Tvrdoš							X
12.	NKD610	Monastery of the Presentation of the Virgin, Zavala						X	
13.	NKD611	Mill in Budoši	X						X
14.	NKD612	Mill in Ždrijelovići							X

List of immovable cultural assets of Trebinje (3)

#	ID	Name of cultural monument	National list of monuments			Other cultural assets			
			1	2	3	4	5	6	7
15.	NKD613	Bridge on the river Sušica, Vučija							X
16.	NKD614	Bridge, Mostaći		X					
17.	NKD615	Necropolis of stećak tombstones Staro Slano 1, Staro Slano					X		X
18.	NKD616	Necropolis of stećak tombstones , St. George' s Church , Domaševo-Musići					X		X
19.	NKD617	Necropolis of stećak tombstones Žakovo 1					X		X
20.	NKD618	Necropolis of stećak tombstones Žakovo 2					X		X
21.	NKD619	Necropolis of stećak tombstones Kličanj, Krajkovići			X		X		
22.	NKD620	Necropolis of stećak tombstones, Ljeskova glavica, Ugarci-Sušići					X		X
23.	NKD621	Necropolis of stećak tombstones Crnač, Čičevo					X		X
24.	NKD622	Necropolis of stećak tombstones Vrpolje					X		X
25.	NKD623	Necropolis of stećak tombstones Hum					X		X
26.	NKD624	Necropolis of stećak tombstones Crkvina, Gornje Vrbno					X		X
27.	NKD625	Remains of architectural ensemble of churches of St.Peter and St.Pavle with the necropolis of stećak tombstones , Čičevo		X			X		
28.	NKD626	Bridge on the river Sušica, Vučija					X		X

List of immovable cultural assets of Trebinje (4)

#	ID	Name of cultural monument	National list of monuments			Other cultural assets			
			1	2	3	4	5	6	7
29.	NKD627	Remains of the Church of St. Ignjatija (Maleševka), Žudojevići					X		X
30.	NKD628	Remains of the Church of St. Petar, Domaševo-Ljubomir							X
31.	NKD629	Orthodox Church of St. Vračiči (Vračevica) with a prehistoric mound (tumulus), Gomiljani			X				
32.	NKD630	Orthodox Church of St. Clement with old stone tombstones (crusaders), Dražin Do		X					
33.	NKD631	Orthodox Church of St. Nikola with old stone tombstones (crusaders) Domaševo-Ljubomir		X					
34.	NKD632	Orthodox Church of the Assumption with necropolis of stećak tombstones and old stone tombstones (crusaders) Drijenjani-Popovo polje		X					
35.	NKD633	Prehistoric mound, churchyard and necropolis Crkvina, Kremeni Do					X		X
36.	NKD634	Prehistoric hillfort Brijeg, Mostaći			X		X		
37.	NKD635	Prehistoric hillfort Varina Gruda, Aleksina Međa					X		X
38.	NKD636	Prehistoric hillfort Velika and Mala, Hum					X		X

List of immovable cultural assets of Trebinje (5)

#	ID	Name of cultural monument	National list of monuments			Other cultural assets			
			1	2	3	4	5	6	7
39.	NKD637	Prehistoric hillfort Gradac, Dražin Do					X		X
40.	NKD638	Prehistoric hillfort and mound, Dobromani					X		X
41.	NKD639	Prehistoric hillfort with tumulus and fortress Ilijino brdo, Mesari					X		X
42.	NKD640	Prehistoric hillfort with tumulus, Pridvorci					X		X
43.	NKD641	Prehistoric hillfort, Ljubomir- Ukšić					X		X
44.	NKD642	Prehistoric mounds, Strujiići					X		X
45.	NKD643	Prehistoric tumulus, Zarečje Mosko			X		X		
46.	NKD644	Resulbegović (Bey's) house		X				X	
47.	NKD645	Spahovića tower with courtyards, Bihovo		X					
48.	NKD646	Medieval town of Mičevac, Mičevac		X			X	X	
49.	NKD647	Medieval church, Krajkovići			X		X		
50.	NKD648	Old town Klobuk, Klobuk		X					
51.	NKD649	Trebinje - a spatial cultural and historical whole		X					X
52.	NKD650	Tumulus and necropolis of stećak tombstones, Ugarci Sušići					X		

List of immovable cultural assets of Trebinje (6)

#	ID	Name of cultural monument	National list of monuments			Other cultural assets			
			1	2	3	4	5	6	7
53.	NKD651	Hadžiahmetović towers with courtyards in Mostači, architectural ensemble		X					
54.	NKD652	Emperor's Mosque, Sultan Ahmed's Mosque with cemetery and mekteb						X	X
55.	NKD653	Church of the Ascension of Christ, Dubočani							X
56.	NKD654	Church of the Ascension of Christ, Konjsko- Zupci							X
57.	NKD655	Church of Kostadinović (dedicated to St. Constantine and Helen) with necropolis with stećak tombstones, Gomiljani			X			X	
58.	NKD656	Church of the Intercession of the Virgin, Mosko Ljubomir							X
59.	NKD657	Church of the Transfiguration							X
60.	NKD658	Church of the Nativity of the Virgin with old stone tombstones (crosses), Dračevo Popovo polje		X					
61.	NKD659	Church of the Nativity of the Virgin, Hum					X		
62.	NKD660	Church of St. Andrew , Zgonjevo-Poljice							X
63.	NKD661	Church of St. Apostoles Petar and Pavle Bare							X

List of immovable cultural assets of Trebinje (7)

#	ID	Name of cultural monument	National list of monuments			Other cultural assets			
			1	2	3	4	5	6	7
64.	NKD662	Church of St.Archangel Michael with the necropolis with stećak tombstones, Arandelovo	X					X	
65.	NKD663	Church of St.Archangel Michael Ugarci							X
66.	NKD664	Church of St.Archangel with the necropolis with stećak tombstones, Veličani		X					
67.	NKD665	Church of St. Varvara with a cemetery and a necropolis with stećak tombstones, Strujići-Popovo polje			X				
68.	NKD666	Church of St Vasilije Ostroški , Gornje Vrbno							X
69.	NKD667	Црква Св. Георгија (Ђурђевица), Гомиљани			X			X	
70.	NKD668	Church of St. George (Birth of the Mother of God), Dubljani							X
71.	NKD669	Church of St. George, Prljača , Gorica							X
72.	NKD670	Church of St.Ilija with a prehistoric tomb mound (tumulus) and a necropolis with stećak tombstones, Mesari			X				
73.	NKD671	Church of St.Ilija,Jasen							X
74.	NKD672	Church of St. Joakim and Ana , Vrpolje							X

List of immovable cultural assets of Trebinje (8)

#	ID	Name of cultural monument	National list of monuments			Other cultural assets			
			1	2	3	4	5	6	7
75.	NKD673	Architectural ensemble- Church of St. John the Baptist together with the movable heritage and the Orthodox cemetery in Donje Vrbno		X					X
76.	NKD674	Church of St. Jovan, Žakovo					X		X
77.	NKD675	Church of St. Jovan , Orahovac							X
78.	NKD676	Church of St. Kliment, Mostači	X						
79.	NKD677	Church of St. Konstantin and Jelena, Pridvorci							X
80.	NKD678	Church of St. Nedjeljke , necropolis with stećak tombstones and remains of the prehistoric settlement of Taleža			X		X		
81.	NKD679	Church of St. Nikola, Mrkonjići (Popovo polje)							X
82.	NKD680	Church of St. Pantelejmon and old school, Aleksina Međa							X
83.	NKD681	Church of St. Petka (Petkovic) and the Old Bridge (Bridge on Bara) in Mostači, architectural ensemble		X					
84.	NKD682	Church of St. Petka ,Bihovo							X
85.	NKD683	Church of St. Petka , Grab-Zupci							X
86.	NKD684	Church of St. Petar, Čičevo						X	X

List of immovable cultural assets of Trebinje (9)

#	ID	Name of cultural monument	National list of monuments			Other cultural assets			
			1	2	3	4	5	6	7
87.	NKD685	Church of St. Roka Trebimlja						X	X
88.	NKD686	Church of St.Stefan (Šćepan), Donji Turani							X
89.	NKD687	Church of St.Stefan , Žakovo					X		
90.	NKD688	Church of Holy Trinity , Volujac							X
91.	NKD689	Church of the Assumption of the Virgin with necropolis of stećak tombstones and old stone tombstones, Lug		X					
92.	NKD690	Church of the Assumption of the Virgin, Necvijeće							X
93.	NKD691	Church of the Assumption of the Virgin, Turmenti-Zubci							X
94.	NKD692	Muje Kotezlije Mosque, Kotezi		X					
95.	NKD693	Osman Pasha Ruselbegović Mosque						X	X
96.	NKD694	Six prehistoric tombs (tumulus), Gomiljani	X				X		
97.	NKD695	School , Donje Vrbno							X
98.	NKD778	Harem of the Old Mosque on Svatovska glavica, Lastva	X						

List of immovable cultural assets of Trebinje (10)

#	ID	Name of cultural monument	National list of monuments			Other cultural assets			
			1	2	3	4	5	6	7
99.	NKD779	The architectural ensemble of the Church of St. Nikola and the Church of the Nativity of St. Jovan the Baptist with the Orthodox cemetery in Poljice		X					X
100.	NKD780	Church of the Holy Prophet Ilija with the Orthodox cemetery in Sedlari		X					X
101.	NKD781	The church of the transfer of the relics of St. Nikola the miracle worker with the Orthodox cemetery in Grmljani		X					

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Client:

- City of Trebinje

Project : „City of Trebinje Tourism Development Strategy 2020-2030.“

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