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## (No) Competitiveness and Sustainable Development of Serbian Tourism

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### Abstract

Transition in Serbia started in 2000 and is still in progress. Achieved reforms in economic development has influenced the change of economic structure in favor of service sector, which has the largest sectoral participation in the creation of gross domestic product. Tourism has an important place within the service sector, and has always represented a great opportunity for development of Serbia. Though, in recent decades tourism development in Serbia has not attached great importance, which resulted in low competitiveness of Serbian tourism in the international market. The aim of this paper is to analyze trends in the tourism of Serbia since 2000, to indicate on the competitive position of Serbian tourism in the world, as well as on the necessity of improving the development of tourism in order to develop on a sustainable basis.

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*Keywords:* Tourism; Competitiveness, Sustainable Development; Serbia;

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### 1. Introduction

The transition process takes place in Serbia for more than a decade, and the restructuring of the economy is an integral part of the entire transition process of national economy and implies comprehensive changes in production structure, finance, property and organization at the macro and the micro level. Important place in all transition and reform processes in the Serbian economy belongs to tourism, apropos the most important share of tourism in the economic structure. Tourism is an important

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driver of economic development, especially important for poverty reduction in developing countries. It is believed that most new jobs in developing countries opened just in the tourism industry.

Qualitative and heterogeneous basis exist for the successful development of Serbian tourism: the natural conditions are significant, cultural - historical heritage is rich and the overall social conditions, builded material base and a favorable transportation and geographical position. Prerequisites which Serbia possesses presented the basis of any successful development of tourism, so in the future structural adjustments are needed in order to significantly increase revenues from tourism.

In recent decades, tourism development in Serbia has not attached great importance, which resulted in low competitiveness in the international market. In support of this fact discourse the data that only in 2007 is achieved the higher income from tourism made in the 1990. Previous development of tourism was not accompanied and directed by appropriate policy, which led to numerous mistakes and consequential adverse effects. In the current development of tourism in Serbia is attended the gap to the similar products that are offered in international markets of developed European destinations. Serbian tourism should be predominantly export-oriented, for what is needed: to innovate and to modern structure the tourism product in accordance with contemporary market requirements and standards.

Tourism of Serbia should be export-oriented, requiring adjustment of the tourism product to contemporary market requirements and standards. In the future, it is necessary an integrated approach to tourism development, based on quality, which would contribute to raising the international competitiveness, but also to sustainable tourism development. Comprehensive changes in tourism would provide a faster reintegration of Serbia into the international environment, and thus increasing the share of foreign trade and consumption.

Because of the fact that tourism represents a great development opportunity for Serbian prosperity, and due to the fact that this development opportunity was for a long time neglected, this paper has as the aim to analyze trends in the Serbian tourism since 2000, to indicate on it's competitive position in the world, as well as on the necessity of improving the development of tourism in order to develop on a sustainable basis. This aim of research imposes the need of using the analysis method of studied phenomenon, the method of comparison and the synthesis methods of researched results.

In the first part of the paper the analysis is focused on identifying the competitive position of Serbian tourism on the international market, while also pointing out the key shortcomings of domestic tourism offer. Given that tourism in the last two decades has transformed into one of the key factors for achieving sustainable development, the second part of the paper is implicitly aimed at explaining the importance of tourism development on a sustainable basis in the context of overall reform processes in Serbia. After pointing out the role of government in the development of sustainable tourism and the identification of strategic courses of action, in the last part is made a synthesis of researched results.

## **2. The Competitiveness of Serbian Tourism**

It was always said that tourism presents a large and idle opportunity for Serbia, which has a natural beauty that no one has. Distinctive nature conditions, rich cultural - historical heritage and favorable geographical - transportation location we should add an established material base of tourism, especially accommodation facilities, and then other contents which Serbia has for further development in this regard. Tourism as an industry, in the future will be a chance only if the competent authorities do not take action that would have made a profitable tourism industry.

Today, Serbia still does not fulfil substantial results in the tourism industry, because with about 87,000 accommodation facilities in old buildings can not achieve neither approximate commercial results obtained by competitors. Because of the well-known events in the past twenty years in Serbia, the process of restructuring and privatization has delayed. Serbian tourism does not have the modern forms of supply,

beginning from new hotels, golf courses, spas, rural facilities, new infrastructure and so on, because there were no significant investments from the country and abroad. The structure of hotel accommodation in 2004 is presented in the following table. Showed structure has not significantly changed to date.

Table 1. The structure of hotel accommodation in Serbia, 2004

| Hotel category      | Share in% |
|---------------------|-----------|
| 5 star hotels       | 3         |
| 4 star hotels       | 8         |
| 3 star hotels       | 33        |
| 2 star hotels       | 32        |
| 1 star hotels       | 7         |
| Unclassified hotels | 17        |

Source: Ministarstvo trgovine, turizma i usluga. (2005). *Strategija turizma Republike Srbije 2005 – 2015*. Beograd, p. 15

Showed structure of hotel accommodation has not significantly changed since 2004, and it was carried out according to the Rules on categorization of the hotels in 1994. According to the current Rules, five-star had only seven hotels in Serbia, ``Hyatt``, ``Continental`` and ``Zlatnik`` in Belgrade, ``Park`` and ``Leopold`` in Novi Sad, ``Prezident`` in Kobilovo and ``Vila Breg`` in Vrsac.

There is no uniform standard categorization of hotels in the world, which vary by country, and in some countries, like Italy, the categorization differs by the provinces. During 2010, Serbia was adopted the new Rules on categorization of the hotels, which was made by the model of the association ``Hotel Stars Union`` which is part of the European Association of Hotels and Restaurants. Hotel Union Stars consists of seven countries - Germany, Austria, Sweden, Switzerland, Hungary, the Czech Republic, and the Netherlands and those countries have harmonized their standards of hotels classification. Given the unfavorable structure for hotel accommodation, the new Rules on the classification of hotels will affected to an even less favorable structure.

Unfavorable structure of hotel accommodation in Serbia refers to the low competitiveness of Serbian tourism on the international market. However, the best indicator of tourism competitiveness of one country is Index of Travel and Tourism, which was published since 2007 by the World Economic Forum. This Report is not a list of the attractiveness of countries for tourists, but an Index that measures the factors that contribute to the travel and tourism. Comparative analysis of factors competitiveness should contribute to the better decision making in particular of those countries that have the ambition to improve tourism industry.

World Economic Forum, a leading researcher of competitiveness in the world, with this research as well as with those in other areas, seeks to answer the question: why some countries are developing successfully, while others lag behind. Measuring the level of competitiveness of national travel and tourism industry is fueled by the fact that travel and tourism are becoming a dominant development force in many countries. Thus, for example, tourism revenues worldwide increased from \$ 2.1 billion in 1950 to 623 billion dollars in 2006, and travel and tourism sector now accounts for more than 10% of gross domestic product globally. In addition, international travel increased from 25 million in 1950 to 763 million in 2004.

Providing that, the World Economic Forum decided for a first time to measure the competitiveness of individual countries in tourism. Index of competitiveness in travel and tourism measures the factors and

policy that stimulate the development of tourism and travel. This Index consists of 14 pillars of competitiveness. (1) Policy rules and regulations, (2) Environmental sustainability, (3) Safety and security, (4) Health and hygiene, (5) Prioritization of Travel & Tourism, (6) Air transport infrastructure, (7) Ground transport infrastructure, (8) Tourism infrastructure, (9) Information and communication (ICT) infrastructure (10) Price competitiveness in the T&T industry (11) Human resources, (12) Affinity for Travel & Tourism, (13) Natural resources, and (14) Cultural resources.<sup>†</sup>

Research on the competitiveness of the world and the European countries in the field of travel and tourism (T&T) conducted by the World Economic Forum, has put Serbia on the bottom of the list of European countries, namely on the 38th position of 42 countries, and globally, Serbia is ranked on 82th position on the list of 139 countries. Of all European countries only Ukraine (39), Armenia (40), Bosnia and Herzegovina (41) and Moldova (42) are poorly positioned in regard of Serbia. The sum of all conditions that were discussed showed that Switzerland is the most competitive, followed by Germany and France.<sup>‡</sup>

Table 2. Selected European countries in the Travel & Tourism Competitiveness Report 2011

| Country                | Position in Europe of 42 countries | Position in the world of 139 countries |
|------------------------|------------------------------------|--|
| Austria                | 4                                  | 4                                      |
| Italy                  | 20                                 | 27                                     |
| Slovenia               | 23                                 | 33                                     |
| Croatia                | 24                                 | 34                                     |
| Hungary                | 26                                 | 38                                     |
| Bulgaria               | 27                                 | 48                                     |
| Turkey                 | 29                                 | 50                                     |
| Albania                | 35                                 | 71                                     |
| Macedonia              | 37                                 | 76                                     |
| Serbia                 | 38                                 | 82                                     |
| Bosnia and Herzegovina | 41                                 | 97                                     |

Source: World Economic Forum. (2011). *The Travel & Tourism Competitiveness Report 2011 – Beyond the Downturn*. Geneva, Switzerland, p. XVI.

The result shows that Serbia is not interested in investing in tourism, as Serbia on this criterion takes 103th place, the state of its roads are located in the bottom of the table, and among the items that were rated poor are quality of port infrastructure, training of personnel, extent and effects of taxation in T&T industry, prices in hotels, the quality of the environment, the implementation of environmental criteria and the other. Research has shown that Serbia is among the top 50 countries according to competitiveness according the time for starting a business, health and hygiene, purchasing power parity, prices of airport

<sup>†</sup> World Economic Forum. (2011). *The Travel & Tourism Competitiveness Report 2011 – Beyond the Downturn*. Geneva, Switzerland, p. XIV.

<sup>‡</sup> All data based on: World Economic Forum. (2011). *The Travel & Tourism Competitiveness Report 2011 – Beyond the Downturn*. Geneva, Switzerland, p. XV.

taxes, stadiums, the presence of large car rental companies... What is particularly not good is that Serbia is on 22th position on the list in regard to traffic accidents.

Table 3. Summary of general information and tourism activities in Serbia and Austria, 2008 – 2010

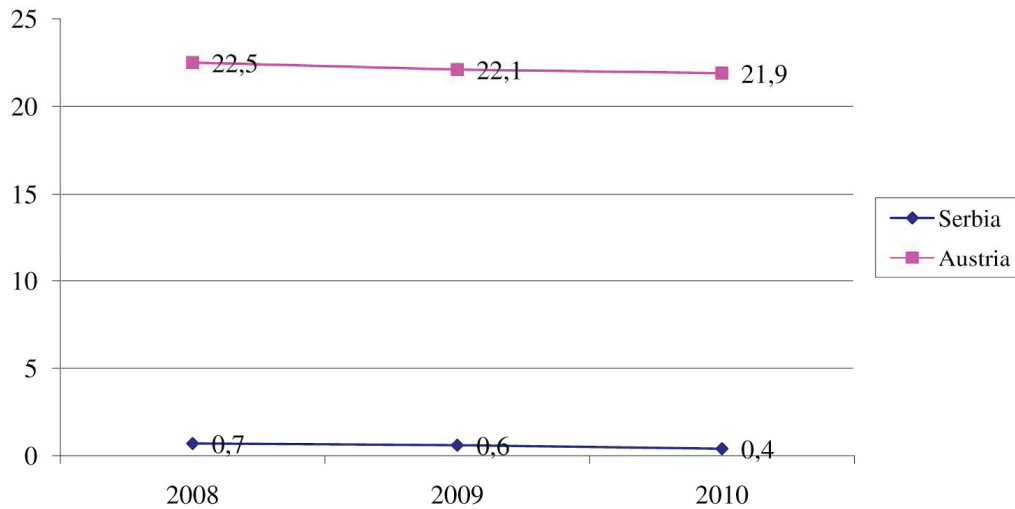
|      |                    | Serbia (without Kosovo and Metohia) | Austria                |
|------|--------------------|-------------------------------------|------------------------|
|      | Surface            | 88.361 km <sup>2</sup>              | 83.871 km <sup>2</sup> |
|      | Population         | 7,5 millions                        | 8,3 millions           |
|      | EU membership      | not a member                        | a member of since 1995 |
| 2008 | Number of tourists | 2,266 mil.                          | 32,6 mil.              |
|      | Overnight stays    | 7,334 mil.                          | 126,7 mil.             |
|      | Income of tourism  | 944 mil. \$                         | 22,5 billion €         |
| 2009 | Number of tourists | 2,021 mil.                          | 32,3 mil.              |
|      | Overnight stays    | 6,777 mil.                          | 124,3 mil.             |
|      | Income of tourism  | 850 mil. \$                         | 22,1 billion €         |
| 2010 | Number of tourists | 2,001 mil.                          | 33,4 mil.              |
|      | Overnight stays    | 6,414 mil.                          | 124,9 mil.             |
|      | Income of tourism  | 523 mil. \$                         | 21,9 billion €         |

Source: [http://www.statistik.at/web\\_de/static/ankuenfte\\_und\\_naechtigungen\\_im\\_tourismus-kalenderjahr\\_2000\\_bis\\_2009\\_030028.xls](http://www.statistik.at/web_de/static/ankuenfte_und_naechtigungen_im_tourismus-kalenderjahr_2000_bis_2009_030028.xls), date of access 10/08/2011; [http://www.austriatourism.com/media/8998/Ums%C3%A4tze%20pro%20Saison%20bis%20Sommer%202009\\_10%2012%2009.pdf](http://www.austriatourism.com/media/8998/Ums%C3%A4tze%20pro%20Saison%20bis%20Sommer%202009_10%2012%2009.pdf), date of access 10/08/2011; [http://www.austriatourism.com/media/8998/2011E\\_%20Kalenderjahr%202010\\_%20Eckdaten\\_01%2003%202011.pdf](http://www.austriatourism.com/media/8998/2011E_%20Kalenderjahr%202010_%20Eckdaten_01%2003%202011.pdf), date of access 10/08/2011; RZS. (2009). *Saopštenje za javnost RZS*, br. 18. Beograd, 29.01.2009.; RZS. (2010). *Saopštenje za javnost RZS*, br. 30. Beograd, 01.02.2010.; and RZS. (2011). *Saopštenje za javnost RZS*, br. 21. Beograd, 31.01.2011.

Serious analysis of these data will clearly point to the inefficient regulation that is the result of inappropriate tourism development strategy, a strategy loaded in the first place by inefficiency and ideological delusions and tourist utopianism in the national exaggerated assumptions. Tourism should be returned to the private sector, small businesses and small entrepreneurs and to stimulate development that will enable tourism to create jobs quickly and as elsewhere is a means of fighting poverty, whose proportions in Serbia are frightening. Poor tourism infrastructure is also a consequence of failing to understand the importance of tourism for economic development.

Serbia has conditions for tourism development, natural as well as historical. It is necessary to give greater priority to tourism, but with more deregulation and direct impact on producers of passenger and tourism services, small entrepreneurs and new entrepreneurs. Available tourism offer, points to the fact that Austria is the most similar state for comparison with Serbia. Like Serbia, Austria has no sea, but there are mountains, spas and excellent infrastructure for the congress and cultural tourism which is very well used. The general information and tourism activities of Austria and Serbia are presented in the Table 3.

The presented data in the Table 3 clearly indicate that there is a huge difference between Austria and Serbia tourism, although it is almost identical to the tourism offer. Austria visited about 15 times more visitors who realize about 17 times more nights as compared to the number of tourists and overnight stays in Serbia. There is also a significant difference in the realized amount of income from tourism. In order to more clearly determine the differences in income from tourism in Serbia and Austria, the following graphic will show income from tourism in Serbia and Austria.



Graph 1. Revenue from tourism in Serbia and Austria, 2008 - 2010, in billion €

Source: Own graphic display based on data from Table 3.

The displayed graph clearly shows that the Austrian tourism revenue is in the range of 21.9 to 22.5 billion euros, while in Serbia tourism revenues do not exceed one billion euros! As the relationship between the U.S. dollar and the euro has taken a ratio of 1:1.4, in which case the foreign currency inflow from tourism in Serbia is moving in the noticed period, ranging from 400 to 700 million euros. The displayed graph also shows that Serbia has more than 35 times lower income compared to Austria!

As we have seen Serbia has some 87,000 accommodation units, which is almost identical to the number of accommodation units in Austria, which has about 20,000 hotels and guest houses and around 50,000 private accommodation units. By the number of guests who visited Austria, the country is located between 10th and 15th places in the world, and somewhere around 10th place of the revenue generated from tourism in the world. Also, according to official statistics, tourism accounts for about 2% in GDP formation in Serbia, while in Austria, tourism accounts for about 9% in GDP formation.

Well known events in the last two decades that have overtaken Serbia significantly predetermined competitiveness of Serbian tourism, which, as we have seen is not in a high level. Another fact tell us in

favor of that: Serbia is needed seventeen years (in 2007) to generate higher revenue from tourism that in 1990 amounted to 414 million dollars.

Starting from the above important indicators of the competitiveness of tourism in Serbia, we can conclude that tourism in Serbia over the last twenty years spent in a state of general lethargy and stagnation. Due to this tourism development, now it is characterized by numerous and very serious problems, especially in regard with tourism offer. In particular, it should emphasize the following important shortcomings:

- Lack of strategic positioning of Serbia and its general unrecognizability on the tourism map of the world
- Unsatisfactory structure of hotel facilities, with a high percentage of hotel objects low categories
- Market mismatches of accommodations units to requirements of modern demand
- Unfinished process of privatization, as well as cases of poorly implemented privatization
- Lack of variety of tourism products that could attract foreign demand
- Insufficient communal infrastructure that in most areas is not accompanied increased construction of commercial and other tourism facilities
- Unplanned and excessive construction of the accommodation offer, which in some regions threatens to permanently undermine the long-term tourism potential of these destinations
- Mismatch between price and quality in the area of offer.

All disclosed so far, lead us to conclude that Serbia can look at tourism development opportunity, but it requires significant adjustments. Also, quite logically, given the current state of tourism, the question arises: is it possible to achieve sustainable development of Serbian tourism?

### **3. Sustainable Development of Serbian Tourism**

Economic development depends on many factors that affect the long term regulation and conduct the economic trends. Stable development is not easy to achieve given that it depends on the size of the country and its wealth of available factors of production, the level of technical and technological development, efficiency of economic system, social environment and political situation, changes in the pace of development of other economies with which they are developed economic ties, the level of responsibility and a number of economic factors.

The current state of national economy unequivocal indicates on the need for urgent access to realization of the basic goal defined as a strategy of rapid economic development, apropos it is necessary to make a choice of basic development priorities. New long term development strategy of Republic of Serbia should be oriented towards sustainable development of tourism because, as we have seen, on Austria example, it is possible to achieve impressive revenue from this segment of the economy.

Creating the necessary conditions for defining the basic priorities for tourism development requires a complex approach. This new approach as a minimum must include a complete transformation of all institutional solutions that make the existing economic system. Individual and partial solutions are only in the function of ``fire fighting``, and not in the function of long-term strategy for economic and social development. Also, the long term overcoming of economic difficulties and contradictions implies a fundamental reform and reorganization of political system which is still under the influence of institutional arrangements in the former Yugoslavia.

In the last twenty years, tourism has, in both positive and negative sense, developed into an important factor in the context of sustainable development. In the framework of EU tourism represents one of the largest sectors of the economy with 9% of employees and 9% participate in consumption. It also

represents one of the five export categories in 83% of all world countries and a major source of foreign exchange earnings in almost 38% of the countries. That is the key reason to have a major role in the economy of many countries as a source of employment and a way to fight poverty. According to the forecasts of the World Tourism Organization (WTO) the number of tourist arrivals in Europe will be doubled until 2020, and will amount 720 million. This expected development implies a serious risk to the environment and the welfare of the population, but also for the tourism as an industry.

Sustainable tourism in its basic sense, means the industry that made minimal impact on the environment and local culture, while helping earning, job creation and protection of local ecosystems. Namely, it is responsible tourism that is friendly relates to the natural and cultural heritage. There is still no single accepted definition of sustainable tourism, which implies not only appreciation of the sustainable development principles, but also the ethical changes a the all participants in the tourism process.

In order to achieve sustainable tourism development, it is necessary an integrated approach to its planning and management. Also, it is noticeable the increasing need for combining the traditional urban management (transportation, planning of land exploitation, marketing, economic development, fire protection and so on, with the need for planning of tourism activities.

Some of the most important principles of sustainable tourism include:<sup>§</sup>

- Tourism must be developed with the help of the local community, tasked to carry out monitoring
- Tourism should provide quality jobs to the local population and establish a link between local businesses and tourism
- It must establish a code of conduct in tourism at all levels - national, regional and local - based on internationally accepted standards
- To develop educational, vocational programs in order to improve heritage and natural resources.

Providing the obligations of Serbia affirmed by signing the Rio documents - Agenda 21 (Rio de Janeiro, 1992) Implementation Plan, Point 41 - Summit Rio + 10 (Johannesburg, South Africa (2002)), with regard to development, sustainable tourism aims to:

- Meet all the needs of temporary visitors (tourists)
- To maintain long-term quality of the environment (resources) and
- Ensure that future generations can, on the original properties of natural and social resources, continue to develop tourism.\*\*

In order to achieve the concept of sustainable tourism development in Serbia, it is necessary to ensure two things. *First*, it is necessary to provide a positive image of Serbia in the world, and for its promotion a unique access of all stakeholders is needed. *Second*, it is necessary to provide evidence of a new, positive image of Serbia as the main center of culture, arts, trade and cultural - historical heritage. Basis for changing the image and tourism development are much needed investment in tourism. It has already been mentioned that Serbia has a quality and diverse foundation for the successful development of tourism. Eligibility requirements, such as natural amenities, rich cultural - historical heritage and a favorable geographical - transportation position form the basis of any successful development of tourism.

The present moment imposes the following courses of action:

- Achievement the satisfactory international competitiveness of products and services in tourism
- Reducing the extreme seasonality of the Serbian tourism by various measures and new tourism development strategy
- Tourism development on the basis of the growing participation of knowledge and information
- Increase capacity utilization

<sup>§</sup> [www.iclei.org/europe/tourism](http://www.iclei.org/europe/tourism), date of access 10/08/2011.

\*\* Grupa autora. (2000). *Održivi i odgovorni razvoj turizma u XXI veku*. Beograd: Turistička organizacija Srbije, p. 116.



- Employment growth of the working population
- Stimulating the opening of small and medium enterprises in tourism
- Creating favorable conditions for attracting investment
- Completion of privatization and
- Stimulating the investment.

In the near future, the State should respond to the question of whether to be an investor in tourism facilities or partner that creates only the initial, infrastructural conditions for investors. According to some statements in the competent Ministry of Economy, in Serbian tourism should invest 3 billion euros in order to Serbia in 2015 reaches 2.5 billion euros of annual revenues. It is certain that the State has no money to invest. The global economic crisis has left an impact on the Serbian tourism, besides the impacts that had on the Serbian economy. As we have seen revenue from tourism in 2010 was considerably reduced compared to previous years.

Also, the State has an important role in the development of sustainable tourism as follows: (1) through strategic measures and tools, as well as its economic policy the State should set priorities in the development of tourism, (2) to define the time aspect of development, (3) with certain measures to stimulate the development of tourism (primarily referring to certain subsidies and favorable credit arrangements in the development of tourism) and (4) it is also significant the role of government in tourism promotion activities in the global market.

One of the key determinants of sustainable tourism development policy of Serbia is an export orientation and improving the export performances of tourism, because an increase in exports of services should become one of the driving forces of future growth and development of Serbia. The choice of export orientation does not mean that export is increasing of its own. Increased export implies more efficient production, apropos decrease costs and prices in tourism, improving the quality, compliance with EU standards, implementing new technologies and knowledge, the use of modern forms of promotion, etc.

Based on everything so far been said about the situation in Serbian tourism and providing that it is expected that this year will be extremely unfavorable, regarding the situation in the Serbian economy, it should not expect that there will be significant growth in tourism revenues in 2010. It seems that the long-expected revenue from tourism amounted to one billion dollars is still elusive.

#### **4. Conclusion**

Serbia destine at least assertive for a much faster and more complete development of tourism in the subsequent years. From the point of view of improving tourism, Serbia has made notable results, especially if we take into account the legacy of the past and the crisis in Serbia that is present about two decades. According the appraisal of domestic and foreign experts, Serbian tourism has the necessary potential for penetrating on the international market and the increase in GDP on this basis. Serbia has a long and not easy way to poured all the chances of tourism into achieved targets.

There is no magic reed that would allow the transformation of undeveloped tourism area into developed. A lot of time and significant investments are needed in order to achieve sustainable tourism development, apropos to rise the level of tourism competitiveness. Achieving sustainable tourism requires that employees at all levels, from local to national, must act in accordance with the principles of sustainable development.

In tourism, it is so not important to have the best product, how important is to know well to tell the story of that product and sell it on that way. In the future, it is necessary to understand, recognize and

meet the needs of tourists, provide conditions for profitable business, invest in education and training of employees, to insist on the protection and restoration of natural resources, respect cultural values and diversity, and ensure the continued active role of the State.

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