

# THE ANALYSIS OF TRAVEL AND TOURISM COMPETITIVENESS OF BOSNIA AND HERZEGOVINA

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## Abstract

*Considering the average annual growth rates recorded in the second half of the last century, tourism represents the industry that generates a permanent growth. The importance of tourism is reflected in its close links with a number of activities, such as transport, culture, health, politics. However, many policy makers do not take seriously recommendations of various scholars, experts and international institutions dealing with tourism, by which tourism nowadays has become an engine for economic growth and development, as well as job creation. The competitive position of Bosnia and Herzegovina as a tourism destination remains far below its potentials due to different challenges that limit the performance of BaH tourism. The successful tourism development strategy in BaH must create a unique and attractive image of BaH as a tourism destination and initiate a systematic approach to branding not only the targeted tourism destinations but the entire tourism.*

**Key words:** *travel and tourism competitiveness, comparative advantage, tourism destination*

## INTRODUCTION

In a relatively short period of time, tourism has become a global phenomenon, and according to the number of participants, it is undoubtedly the most widespread phenomenon in international relations. Furthermore, tourism is one of the most important components of international trade. By the analytical interpretation of returns in the international tourism, the tourism industry ranks third, immediately after the oil and chemical industries. The tourism of Bosnia and Herzegovina is at the very low level of development; it is necessary to create the tourism development strategy at the state level in order to transform the comparative advantages into the competitive advantages, and at the same time to create a proper image and brand of BaH as a recognizable tourism destination.

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# ANALIZA KONKURENTSKOG POLOŽAJA BOSNE I HERCEGOVINE KAO TURISTIČKE DESTINACIJE

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## Sažetak

*Imajući u vidu prosječne godišnje stope rasta koje bilježi u drugoj polovini prošlog vijeka, turizam predstavlja privrednu granu koja ostvaruje stalni rast. Značaj turizma ogleda se i u njegovoj bliskoj povezanosti sa nizom djelatnosti, kao što su saobraćaj, kultura, zdravstvo, politika. Međutim, mnogi kreatori politika ne shvataju ozbiljno preporuke različitih teoretičara, stručnjaka i međunarodnih institucija koje se bave turizmom, prema kojima je turizam danas postao pokretač ekonomskog rasta i razvoja, te stvaranja novih radnih mjesta. Konkurentski položaj Bosne i Hercegovine kao turističke destinacije ostaje daleko ispod potencijala zbog različitih izazova koji ograničavaju učinak bosanskohercegovačkog turizma. Uspješna strategija razvoja turizma u BiH mora izgraditi jedinstven i atraktivan imidž, te sistemski pristupiti brendiranju kako ciljnih turističkih destinacija, tako i cjelokupnog turizma.*

**Ključne riječi:** konkurentnost putovanja i turizma, komparativna prednost, turistička destinacija

## UVOD

Turizam je u relativno kratkom periodu postao globalni fenomen, a sudeći po broju učesnika, nesumnjivo najmasovnija pojava u svjetskim relacijama. Nadalje, turizam je jedna od najvažnijih komponenti međunarodne trgovine. Analitička obrada zarade od međunarodnog turizma, turističku industriju svrstava na treće mjesto u svijetu, iza naftne i hemijske industrije. Kada je u pitanju turizam Bosne i Hercegovine mora se konstatovati da je njegova razvijenost na veoma niskom nivou, te da je neophodno izraditi strategiju razvoja turizma na državnom nivou u cilju pretvaranja komparativnih u konkurentne prednosti, uz istovremeno kreiranje adekvatnog imidža i brendiranje BiH kao prepoznatljive turističke destinacije.

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## CONCEPT OF COMPETITIVENESS

Competitiveness has become one of the most important areas of modern economic thought, which is based on ideas developed by classical economists. The term “international competitiveness of the country” is relatively new. When determining competitiveness, it is not the absolute performance of the country that matters, but its relative performance, i. e. how (un)successful it is compared to other countries. The term (relative performance of the country) implies development of public-private partnership in order to promote economic growth and exports. Basically, it has two meanings. The first relates to the well-being of the country, that is the quality of life of its citizens, usually measured by gross domestic product per capita, and second indicates the trade performance of the country<sup>2</sup>.

While at the microeconomic level there is no dilemma about the methodology of measuring competitiveness, at the macro level there are different, almost opposite, attitudes towards the measurement of competitiveness among countries. Some analysts, such as Paul Krugman, argue that the notion of competitiveness is not applicable at the level of economies, only at the level of companies. He advocates that countries do not compete with each other the way corporations do and he refers to competitiveness as a “dangerous obsession”. With his “diamond model”, the most influential authority on modern company strategy and competitiveness, Michael Porter points out that countries that cannot find a clear distinction between comparative advantages and competitive advantages are losers in global economy. *“It is not what industries a nation competes in that matters for prosperity, but how it competes in those industries”*<sup>3</sup>. It should be recalled that competition is not an end in itself, but a means to achieve improved standard of living, quality of life and environmental sustainability. High and rising standard of living, therefore, is a key measure of the success of national competitiveness.

What makes a tourism destination truly competitive is its ability to increasingly attract visitors while providing them with satisfying, memorable experiences, and to do so in a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destination for future generations. This implies *“increasing tourism expenditure and profits of service providers, but does not necessarily mean an increase in the number of tourist arrivals and overnight stays, but increasing the quality of an offer to the acceptable number of tourists, while providing environmental,*

2 Economic Commission for Europe, *Economic Survey of Europe No. 2.*, United Nations, New York and Geneva, 2004, p. 57.

3 Porter, M., *Regional Competitiveness in Global Economy*, The Brookings Institution, Washington, 2008.

## KONCEPT KONKURENTSKE PREDNOSTI

Konkurentnost za relativno kratko vrijeme postaje jedno od najznačajnijih područja savremene ekonomske misli počivajući na idejama koje su razvijali još klasični ekonomisti. Pojam „internacionalne konkurentnosti zemlje“ je relativno nov. Pri utvrđivanju konkurentnosti nije važna apsolutna nego relativna performansa zemlje, tj. koliko je (ne)uspješna u odnosu na druge zemlje. Pojam (relativna performansa zemlje) označava razvoj partnerstva javnog i privatnog sektora radi promovisanja ekonomskog razvoja i izvoza. U osnovi ima dva značenja. Prvo se odnosi na blagostanje zemlje, odnosno kvalitet života njenih građana, uobičajeno mjereno bruto domaćim proizvodom per capita, a drugo na trgovinske performanse zemlje<sup>2</sup>.

I dok na mikroekonomskom nivou ne postoji dilema o metodologiji mjerenja konkurentnosti, na makronivou postoje različiti, skoro oprečni, stavovi o mjerenju konkurentnosti među pojedinim zemljama. Pojedini analitičari, kao što je Pol Krugman, zastupaju stav da konkurentnost nije pojam koji je primjenjiv na nivou cjelokupnih privreda, nego samo na nivou preduzeća. On tvrdi da se zemlje ne mogu takmičiti kao što se takmiče preduzeća i konkurentnost naziva „opasnom opsesijom“. Svojim sistemskim modelom poznatijim pod nazivom „dijamant konkurentnosti“, najuticajniji autor literature o modernoj poslovnoj strategiji i konkurentnosti, Majkl Porter naglašava da su zemlje koje ne mogu naći jasnu distinkciju između komparativnih prednosti i konkurentskih prednosti gubitnici u globalnoj ekonomiji. „*Takođe, u konkurentskoj borbi za nacionalni prosperitet manje je važno u kojoj se grani neka nacija takmiči, već je daleko važnije na koji način ona konkuriše*“<sup>3</sup>. Treba podsjetiti da konkurentnost nije sama sebi cilj, već sredstvo postizanja poboljšanja životnog standarda, kvaliteta života i održivosti okoline. Visok i rastući životni standard je, dakle, ključna mjera uspjeha nacionalne konkurentnosti.

Pod konkurentnošću turističke destinacije podrazumijevamo njenu sposobnost da obezbjeđuje bolja iskustva za posjetioce uz poboljšanje blagostanja lokalnog stanovništva i očuvanje prirodnih i kulturnih resursa za buduće generacije. Navedeno podrazumijeva „*povećanje turističke potrošnje i profita davalaca usluga, ali ne mora da znači i povećanje broja dolazaka i noćenja, već povećanje kvaliteta ponude za prihvatljiv broj turista, uz obezbeđenje ekološke, socio-kulturne i ekonomske održivosti turističke destinacije*“<sup>4</sup>.

2 Economic Commission for Europe, *Economic Survey of Europe No. 2.*, United Nations, New York and Geneva, 2004, str. 57.

3 Porter, M., *Regional Competitiveness in Global Economy*, The Brookings Institution, Washington, 2008.

4 Jegdić, V., Cvijanović, S. i Sajfert, D., „Optimalni model upravljanja turističkom destinacijom“, *Industrija*, Vol. 38, br. 3, 2010, str. 121 – 138.

*socio-cultural and economic sustainability of tourism destination*<sup>4</sup>. Tourism destination competitiveness explicitly indicates the level of socio-economic development of the tourism destination with the special emphasis on the quality of life. Therefore, competition among tourism destinations is but one manifestation of the broader phenomenon of the new economic competition in the XXI century<sup>5</sup>.

Addressing the issue of tourism destination competitiveness is based on the fact that the experience gained by tourists in a tourism destination is a fundamental product in tourism. The aim of the tourist travel for each participant is achieving the desired or expected experience. In this way, the travel represents a tool, an "event" that is attractive itself<sup>6</sup>. It is a dilemma whether the tourist experience makes a sum of positive and negative emotions triggered by certain events during the travel or is it a new quality of satisfaction, i. e. feelings that regenerate a person in a physical and spiritual sense<sup>7</sup>. In any case, the tourist experience is individual, which makes any kind of generalization of its important features very difficult. Having in mind that experiences gained in the tourism destination are the key products in the tourism industry, the competition in tourism is primarily focused on the tourism destination. The competition exists, of course, among the products of certain companies in the tourism industry (such as tour operators, hotels, transportation and other travel services), but this kind of competition arises from and is dependent on the choices made by tourists in comparison to alternative tourism destinations.

## COMPARATIVE ADVANTAGE OF TOURISM DESTINATION

Sustaining tourism destination competitiveness requires a systematic examination of the uniqueness of comparative advantage which provides a special long-term attractiveness in selected market segments<sup>8</sup>. According to the theory of comparative advantage, the differences among countries in relation to the wealth of factors of production cause specialization that leads to the need for trade and exchange. Comparative advantage is based on the

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4 Jegdić, V., Cvijanović, S. i Sajfert, D., „Optimalni model upravljanja turističkom destinacijom”, *Industrija*, Vol. 38, br. 3, 2010, p. 121 – 138.

5 Asch, D., Wolfe, B., *New Economy – New Competition: the Rise of the Customer*, St. Martin's Press/Palgrave, New York, 2001.

6 Popesku, J., *Menadžment turističke destinacije*, Univerzitet Singidunum, Beograd, 2011, p. 63.

7 Rabić, B., *Turističko vođenje u savremenom turizmu*, doktorska disertacija, Univerzitet Singidunum, Beograd, 2009, p. 33.

8 Hasan, S., "Determinants of Market Competitiveness in an environmentally Sustainable Tourism Industry", *Journal of Travel Research*, February 2000, p. 240.

Konkurentnska sposobnost turističke destinacije na eksplicitan način ukazuje na nivo društveno-ekonomskog razvoja turističke destinacije s posebnim osvrtom na kvalitet života. Stoga se konkurencija između turističkih destinacija smatra jednim od oblika ispoljavanja šireg fenomena – nove ekonomske konkurencije u XXI vijeku<sup>5</sup>.

Razmatranje pitanja konkurentnosti turističke destinacije počiva na činjenici da je doživljaj, odnosno iskustvo koje turista stiže u turističkoj destinaciji fundamentalan proizvod u turizmu. Cilj turističkog putovanja za svakog učesnika jeste ostvarenje željenog ili očekivanog doživljaja i iskustva. Time putovanje predstavlja sredstvo, „događaj” koji je sam po sebi privlačan<sup>6</sup>. Posebna je dilema da li turistički doživljaj čini samo zbir pozitivnih i negativnih emocija koje su kod turista izazvali pojedini događaji na putovanju ili je u pitanju jedan novi kvalitet zadovoljstva, tj. osjećanja koje osobu regeneriše u fizičkom i duhovnom pogledu<sup>7</sup>. U svakom slučaju, turistički doživljaj je individualan što otežava bilo koju vrstu uopštavanja njegovih bitnih odrednica. Polazeći od činjenice da doživljaji stečeni u turističkoj destinaciji predstavljaju ključni proizvod u turizmu, konkurencija u turizmu se prvenstveno usredsređuje na turističku destinaciju. Konkurencija postoji, naravno, i između proizvoda pojedinih preduzeća u oblasti turizma (organizatora putovanja, hotela, transporta i ostalih turističkih usluga), ali ova vrsta konkurencije proizlazi iz i zavisna je od izbora koji čine turisti u odnosu na alternativne turističke destinacije.

## KOMPARATIVNA PREDNOST TURISTIČKE DESTINACIJE

Održavanje konkurentnosti turističke destinacije zahtijeva sistematsko ispitivanje jedinstvenosti komparativne prednosti koja obezbjeđuje posebnu dugoročnu privlačnost kod odabranih tržišnih segmenata<sup>8</sup>. Prema teoriji komparativnih prednosti, razlike između pojedinih zemalja u odnosu na bogatstvo faktorima proizvodnje uzrokuju specijalizaciju koja dovodi do potrebe za trgovinom odnosno razmjenom. Komparativna prednost se zasniva na bogatstvu faktorima proizvodnje. Oni se uobičajeno grupišu u pet osnovnih grupa: ljudski potencijali, prirodni resursi, znanje, kapital i infra-

5 Asch, D., Wolfe, B., *New Economy – New Competition: the Rise of the Customer*, St. Martin's Press/Palgrave, New York, 2001.

6 Popesku, J., *Menadžment turističke destinacije*, Univerzitet Singidunum, Beograd, 2011, str. 63.

7 Radošević, B., *Turističko vođenje u savremenom turizmu*, doktorska disertacija, Univerzitet Singidunum, Beograd, 2009, str. 33.

8 Hasan, S., "Determinants of Market Competitiveness in an environmentally Sustainable Tourism Industry", *Journal of Travel Research*, February 2000, str. 240.

richness of the factors of production. They are usually grouped into five main groups: human resources, natural resources, knowledge, capital and infrastructure<sup>9</sup>. In the case of tourism and tourism destination, it is necessary to add historical and cultural resources, as a separate category, and expand the category of infrastructure so that includes the tourism suprastructure<sup>10</sup>.

The quantity, quality and costs of human resources are crucial for achieving destination competitiveness. The development of tourism in the destination depends largely on the available tourism resources, but for the development of tourism it is vital that there is a critical mass of people who have knowledge in order to valorize those resources. Knowledge resources, i. e. know-how, which lacks especially in developing countries, can be added to human resources. Furthermore, a destination with preserved natural resources has a basic prerequisite for tourism development. The uniqueness and diversity of natural resources such as mountains, lakes, canyons, as well as the accessibility of these resources for tourists are the main reasons for choosing a tourism destination. Moreover, climate, geographic position in relation to major source markets and the size of a destination also determine the wealth of a destination, but their impact depends on specific demands (for example, destinations closer to source markets have the advantage of being easily accessible, but, at the same time, a destination distant from the sources of demand can benefit from its more unique and conserved natural resources). Empirical results show that the wealth of natural resources significantly increases the comparative advantage of a tourism destination as capital and labor is not an additional positive or negative factor in shaping comparative advantage destinations<sup>11</sup>.

Furthermore, the size of investment is one of the prerequisites for the development of tourism suprastructure. Capital investment depends on the willingness of investors to invest funds, i.e. from his security and belief in the profitability of investment and return on invested capital. Capital can be invested by large companies or by small and medium-sized enterprises, mostly family businesses that dominate the tourism and hospitality industry worldwide. As of the infrastructure, it includes secondary/additional facilities, equipment, systems, processes and resources necessary for the existence of every destination. Those are information facilities, roads, airports and the like that make a tourism destination accessible to tourists. Then, there are the health care system, repair services, public services (police, fire

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9 Porter, M., *The Competitive Advantage of Nations*, Free Press, New York, 1990, p. 74 – 75.

10 Ritchie, B. and Crouch, G., *The Competitive Destination – A Sustainable Tourism Perspective*, CABI Publishing, Wallingford, 2003, p. 20.

11 Toit, L. et al., “The sources of comparative advantage in tourism”, *Stellenbosch Economic Working Papers*, No. 01, 2010, p. 12.

struktura<sup>9</sup>. U slučaju turizma, odnosno turističkih destinacija, potrebno je dodati istorijske i kulturne resurse, kao posebnu kategoriju, i proširiti kategoriju infrastrukture kako bi uključila i suprastrukturu<sup>10</sup>.

Kvantitet, kvalitet i troškovi ljudskih potencijala od ključnog su značaja za postizanje konkurentnosti destinacije. Razvoj turizma u destinaciji zavisi u velikoj mjeri od raspoloživih turističkih resursa, ali za razvoj turizma je bitno da postoji kritična masa ljudi koji posjeduju znanja za valorizaciju tih resursa. Ljudskim potencijalima se mogu dodati i resursi znanja odnosno know-how, koji posebno nedostaje zemljama u razvoju. Zatim, destinacija koja posjeduje kvalitetne i očuvane prirodne resurse posjeduje osnovni preduslov za razvoj turizma. Jedinstvenost i raznolikost prirodnih bogatstva kao što su planine, jezera, kanjoni, ali i pristupačnost tih resursa za turiste predstavljaju osnovne razloge za izbor turističkih destinacija. Klima, položaj u odnosu na važna emitivna tržišta i veličina destinacije takođe čine bogatstvo destinacije, ali njihov uticaj zavisi od specifičnosti tražnje (npr. destinacije koje su bliže emitivnim tržištima imaju prednosti jer su lakše dostupne, ali, isto tako, u prednosti može biti destinacija koja je udaljenija od izvora tražnje jer ima očuvanija i jedinstvenija prirodna bogatstva). Empirijski rezultati pokazuju da bogatstvo prirodnih resursa bitno povećava komparativnu prednost turističke destinacije dok kapital i radna snaga ne predstavljaju dodatni pozitivni ili negativni faktor u uobličavanju komparativne prednosti destinacije<sup>11</sup>.

Nadalje, količina ulaganja je jedan od preduslova za razvoj turističke suprastrukture. Ulaganje kapitala zavisi od spremnosti investitora da uloži finansijska sredstva, odnosno od njegove sigurnosti i vjerovanja u isplativost ulaganja i povrat uloženog kapitala. Kapital mogu ulagati velike kompanije, ali i mala i srednja preduzeća, najčešće porodična, karakteristična za turističku djelatnost. Infrastruktura podrazumijeva sporedne/dopunske kapacitete, opremu, sisteme i procese i sredstva neophodna za egzistenciju svake destinacije. Tu su, na prvom, mjestu komunikativni faktori, putevi, aerodromi i slično, koji turističku destinaciju čine dostupnom turistima. Zatim tu spadaju i sistem zdravstvene zaštite, servisne usluge, javne službe (policija, vatrogasna služba). Za kvalitetnu infrastrukturu su najčešće odgovorni država i javna preduzeća. S druge strane, suprastruktura<sup>12</sup> predstavlja

9 Porter, M., *The Competitive Advantage of Nations*, Free Press, New York, 1990, str. 74 – 75.

10 Ritchie, B. and Crouch, G., *The Competitive Destination – A Sustainable Tourism Perspective*, CABI Publishing, Wallingford, 2003, str. 20.

11 Toit, L. et al., “The sources of comparative advantage in tourism”, *Stellenbosch Economic Working Papers*, No. 01, 2010, str. 12.

12 Član 3. Zakona o turizmu („Službeni glasnik RS”, br. 36/2009, 88/2010, 99/2011, dr. zakon i 93/2012) definiše turističku suprastrukturu kao ugostiteljske objekte i galerije, izložbene, kongresne i zabavne objekte koji su u neposrednoj vezi sa ugostiteljskim objektima i objektima



department). The state and public enterprises are usually responsible for the quality of infrastructure. On the other hand, the suprastructure<sup>12</sup> represents capacities that rely on the infrastructure and they are mainly built to support tourism. Their primary purpose is to accept and meet the needs and desires of tourists (hotels, campsites, restaurants, theme parks, sports fields). When it comes to cultural and historical resources, they can occur in the physical form (archaeological sites, monuments, architecture, works of art, museums) as well as in the form of intangible heritage including: tradition, language, customs, music, lifestyle, social values, hospitality, etc. The role of national institutions in the promotion and preservation of these resources is huge and it is reflected particularly in the financial and institutional support.

In order to achieve its competitive advantage, the tourism destination must preserve resources (both renewable and non-renewable). For this purpose, it can use strategies that are based on human resources education and development, protection of natural heritage, knowledge transfer but also the creation of local sources of knowledge, investments and capital growth, the construction and maintenance of infrastructure and tourism suprastructure, as well as fostering and the preservation of historical and cultural heritage. The main difference between comparative and competitive advantages of tourism destinations is that the comparative advantage refers to the resources available at the destination, while the competitive advantage is expressed in the ability of a destination to use its resources effectively and efficiently over a long period of time, and to attract tourists so that it increases prosperity and general welfare of the destination. Bearing in mind the mentioned differences, it is possible to have a situation in which a tourist destination with less quality resources achieves better results in the tourism market. Such a situation may arise from the fact that one destination can compensate the lack of natural, cultural and historical resources with knowledge, capital or the level of infrastructure and suprastructure development. A tourism destination decides how it will use its comparative advantages through striving to achieve competitive advantages. In other words, a tourism destination chooses ways to allocate and use its wealth of factors of production.

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12 Article 3 of the Law on Tourism (*“Official Gazette of RS”*, no. 36/2009, 88/2010, 99/2011, other law and 93/2012) defines tourism suprastructure as restaurants and galleries, exhibition, convention and entertainment facilities which are directly related to the restaurants and sports and recreation facilities or, together with them, make a complex.

kapacitete koji se oslanjaju na infrastrukturu i uglavnom su to izgrađena sredstva koja postoje upravo zbog turističke djelatnosti. Njihova primarna svrha je prihvat i zadovoljenje potreba i želja turista (hoteli, kampovi, restorani, tematski parkovi, sportski tereni). Kada je riječ o kulturno-istorijskim resursima, oni se mogu javljati u fizičkom obliku (arheološka nalazišta, spomenici kulture, arhitektura, umjetnički radovi, muzeji) kao i u obliku neopipljivog nasljeđa koje obuhvata: tradiciju, jezik, običaje, muziku, stil života, društvene vrijednosti, gostoprimstvo, itd. Uloga državnih institucija na unapređenju i očuvanju ovih resursa je velika i ogleda se naročito u finansijskoj i institucionalnoj podršci.

Za turističku destinaciju je važno da očuva resurse (i obnovljive i neobnovljive) na kojima može izgraditi konkurentsku poziciju. U tom cilju koriste se strategije koje se zasnivaju na obrazovanju ljudskih potencijala, zaštiti prirodnog nasljeđa, proširivanju znanja i stvaranju domaćih izvora znanja, investicijama i rastu kapitala, izgradnji i održavanju infrastrukture i turističke suprastrukture, kao i njegovanju i očuvanju istorijskog i kulturnog nasljeđa. Osnovna razlika između komparativne i konkurentске prednosti turističke destinacije je u tome što se komparativna prednost odnosi na raspoložive resurse u destinaciji, dok se konkurentska prednost izražava u sposobnosti destinacije da tokom dužeg razdoblja efikasno i efektivno koristi svoje resurse, odnosno da privlači turiste tako da povećava prosperitet i opšte blagostanje destinacije. Imajući u vidu navedenu razliku, moguća je situacija u kojoj turistička destinacija koja posjeduje manje kvalitetne resurse postiže bolje rezultate na turističkom tržištu. Takva situacija može proizaći iz činjenice da jedna destinacija može nadoknaditi manjak prirodnih, kulturnih ili istorijskih resursa znanjem, kapitalom ili nivoom razvoja infrastrukture i suprastrukture. Kroz težnju za postizanjem konkurentске prednosti turistička destinacija se odlučuje na koji će način iskoristiti svoje komparativne prednosti. Drugim riječima, turistička destinacija bira način na koji će angažovati i iskoristiti raspoloživo bogatstvo svojih faktora proizvodnje.

## INDIKATORI KONKURENTNOSTI TURISTIČKE DESTINACIJE

Postoji više modela konkurentnosti turističke destinacije koji se koriste i za predstavljanje konkretnog nivoa konkurentnosti. Neki od modela su dizajnirani za potrebe mjerenja konkurentnosti konkretnih turističkih destinacija zbog čega se nisu mogli prihvatiti kao opšti modeli. Prvi modeli su se pretežno oslanjali na Porterov dijament konkurentnosti koji predstavlja

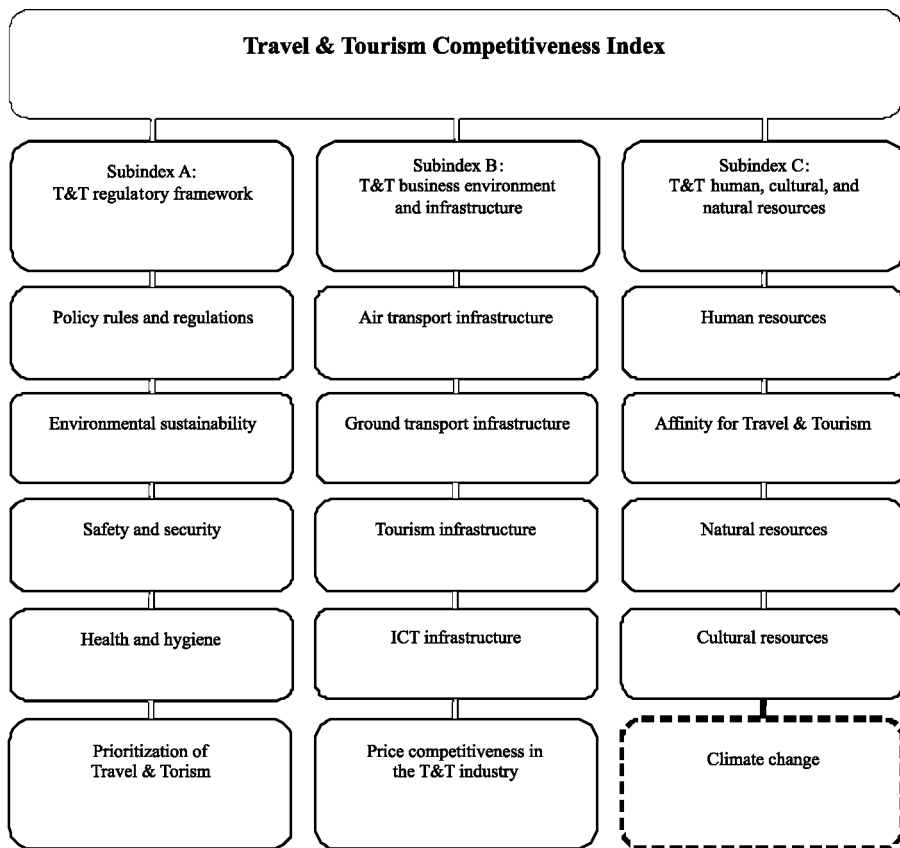
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sportsko rekreativnog sadržaja ili sa njima čine jedinstvenu cjelinu.

## INDICATORS OF TOURISM DESTINATION COMPETITIVENESS

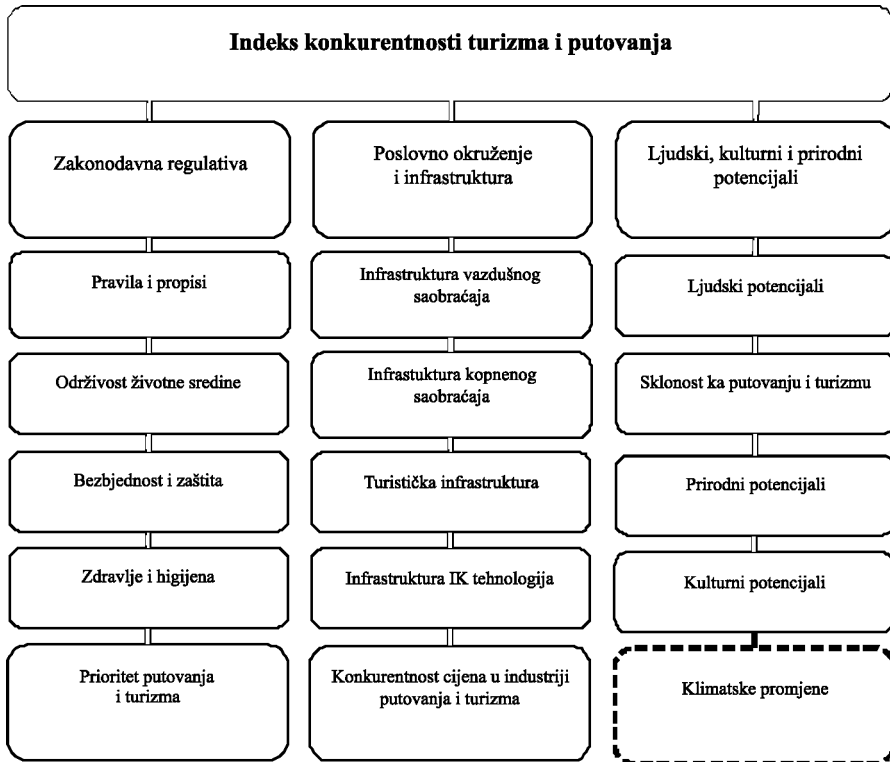
There are many models of tourism destination competitiveness that are used to present the specific level of competitiveness. Some of the models are designed only for the purpose of measuring the competitiveness of specific tourism destinations which caused the fact that they could not be accepted as general models. The first models predominately relied on Porter’s diamond model of competitiveness of the national economy and were related primarily to the economic development. After the initial model given by Crouch and Ritchie in 1993, there were several researches that emphasized the importance of tourism destination competitiveness indicators, such as those by Keyser and Vanhove (1994), Kim (2000), Hassan (2000), Heath (2003), Dwyer and Kim (2003), Enright and Newton (2004).

Chart 1: Structure of travel and tourism competitiveness index



model konkurentnosti nacionalne privrede i odnosi se prije svega na ekonomsku konkurentnost. Od početnog istraživanja Crouch i Ritchie 1993. godine bilo je više istraživanja koja su naglašavala važnost indikatora konkurentnosti turističke destinacije: Keyser i Vanhove (1994), Kim (2000), Hassan (2000), Heath (2003), Dwyer i Kim (2003), Enright i Newton (2004).

Slika 1: Struktura indeksa konkurentnosti turističke destinacije



Pokazatelji konkurentnosti turističke destinacije se mogu svrstati u dvije osnovne grupe s obzirom na mogućnost njihovog relativno preciznog kvantitativnog određivanja. U prvu grupu spadaju objektivni indikatori konkurentnosti, čija je osnovna karakteristika da su mjerljivi, odnosno mogu se izraziti brojevima, dok u drugu grupu spadaju subjektivni pokazatelji koji su vezani prvenstveno za opažanja turista, te su stoga prije svega kvalitativni. U grupu objektivnih indikatora koji se odnose na, recimo, prirodne resurse spadaju: veličina područja koje obuhvataju nacionalni parkovi, parkovi prirode ili rezervati, zatim topografija, prosječna temperatura, broj

Indicators of tourism destination competitiveness can be divided into two major categories in relation to the possibility of their relatively precise quantitative determination. The first group includes objective indicators of competitiveness, and their main characteristic is that they can be measured, that is, expressed in numbers, while the second group includes subjective indicators that are primarily related to tourists' perceptions, and are, therefore, merely qualitative. For example, objectively measured variables can be visitor numbers, market share, tourist expenditure, employment, value added by the tourism industry, etc. while subjectively measured variables are "richness of culture and heritage", "quality of the tourism experience", etc. In some cases, nevertheless, it is very difficult to determine the group some of the indicators belong to<sup>13</sup>. These indicators have to possess certain features in order to be used in the analysis of particular phenomena – they should be above all relevant and well-placed in order to provide full basis for making judgments about the analyzed problem. In addition, the indicators should be easy to understand in order to be accessible to a wide range of users, as well as reliable and based on credible information in order to be a basis for the final evaluation of the competitiveness.

In order to determine and compare the competitiveness of countries as tourism destinations, the World Economic Forum (WEF) from Davos has established the *Travel and Tourism Competitiveness Index*. The Index includes several major categories that are crucial for assessing the level of competitiveness of a country as a tourism destination. Three sub-indices, each of which contains elements and indicators that are the main indices of competitiveness are 1) regulatory framework, 2) business environment and infrastructure and 3) human, cultural and natural resources (see Chart 1). Specific competitiveness indicators are classified into one of these three groups and they are related to the policy of tourism industry development, stakeholders, general and tourism infrastructure as well as destination elements, which are the basis and the backbone of tourism development and the creation of destination competitive position (natural, cultural and human resources). Each of these elements that are classified into 14 pillars of 3 sub-indices is evaluated separately and together forms the general and total T&T competitiveness index. The data on the mentioned variables are collected from different sources: national authorities, international organizations, private sources, but also through surveys and other forms of research.

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<sup>13</sup> Dwyer, L. and Kim, C., "Destination Competitiveness: A Model and Determinants", *Current Issues in Tourism*, Vol. 6, No. 5, 2003, p. 398 – 405.

koralnih grebena, pješčanih plaža, itd. U grupu subjektivnih indikatora mogu se uvrstiti oni koji se odnose na ljepotu prirodne sredine. Naravno da je u pojedinim slučajevima veoma teško odrediti preciznu pripadnost pojedinih od indikatora ovim osnovnim grupama<sup>13</sup>. Da bi se koristili za analizu, efikasni indikatori moraju posjedovati određene osobine; moraju biti relevantni i dobro postavljeni kako bi na najbolji način pružili osnove za donošenje ocjene o analiziranom problemu. Osim toga, indikatori treba da budu jednostavni za razumijevanje kako bi bili pristupačni širem krugu korisnika. Pokazatelji, nadalje, moraju biti pouzdani; drugim riječima, informacije koje pružaju moraju biti vjerodostojne kako bi bili osnova za davanje konačne ocjene o konkurentnosti.

U cilju utvrđivanja i poređenja konkurentnosti država kao turističkih destinacija ustanovljen je *Indeks konkurentnosti turizma i putovanja* Svjetskog ekonomskog foruma (WEF) iz Davosa. Indeks obuhvata nekoliko osnovnih kategorija koje se ispituju kao ključne za ocjenu nivoa konkurentnosti jedne zemlje kao turističke destinacije. Tri podindeksa od kojih svaki sadrži elemente i indikatore koji su osnovni pokazatelji konkurentnosti su 1) zakonodavna regulativa, 2) poslovno okruženje i infrastruktura i 3) ljudski, kulturni i prirodni potencijali (vidjeti Sliku 1). Detaljni indikatori konkurentnosti razvrstani su u jednu od navedenih grupa i odnose se na politiku razvoja turističke privrede, subjekte turističke privrede, opštu i turističku infrastrukturu, te na elemente destinacije koji su osnov i oslonac za razvoj turizma i izgradnju konkurentne pozicije destinacije (prirodni, kulturni i ljudski potencijali). Svaki od podindeksa sačinjava više pokazatelja, klasifikovanih u 14 stubova, koji se posebno ocjenjuju. Na osnovu toga formira se ocjena podindeksa nakon čega se uobličava ukupni indeks konkurentnosti. Podaci u vezi sa navedenim indikatorima dobijaju se iz različitih izvora: od nacionalnih vlasti, međunarodnih agencija kao i iz privatnih izvora. Ostali indikatori se ocjenjuju na osnovu anketiranja kao i drugih vidova istraživanja.

## KONKURENTNOST BOSNE I HERCEGOVINE U OBLASTI PUTOVANJA I TURIZMA

Indeks konkurentnosti putovanja i turizma za 2013. godinu obuhvatio je 140 svjetskih zemalja, a rezultati su zasnovani na statističkim podacima iz 2010. i 2011. godine, kao i anketama privrednika u 14.000 preduzeća širom svijeta. Tematska oblast ovogodišnjeg rangiranja zemalja kao turističkih destinacija se odnosi na veliki potencijal industrije putovanja i turizma kao

<sup>13</sup> Dwyer, L. and Kim, C., "Destination Competitiveness: A Model and Determinants", *Current Issues in Tourism*, Vol. 6, No. 5, 2003, str. 398 – 405.

## TRAVEL AND TOURISM COMPETITIVENESS OF BOSNIA AND HERZEGOVINA

The travel and tourism competitiveness index 2013 covers a record 140 economies worldwide; the results are based on statistical data from 2010 and 2011 as well as surveys carried out among businessmen in 14,000 companies around the world. Thematic field of this year's ranking of countries as tourism destinations covers the great potential of travel and tourism industry as a generator of economic growth and employment. Bosnia and Herzegovina, according to the overall ranking, ranks 90<sup>th</sup> on the scale of tourism competitiveness, which is a modest increase compared to the previous report. However, as in past years, Bosnia and Herzegovina, together with Serbia and Moldova, is at the very bottom of the European rankings. In line with their less-advanced development, these countries will require significant investments in upgrading the infrastructure needed to support healthy and growing T&T sectors. As a matter of fact, results clearly show that the most competitive countries in the world have both supporting business framework and natural resources but also put their efforts in creating an environment that encourages travel and tourism industry development.

Compared to other evaluated countries, it is considered that Bosnia and Herzegovina has competitive advantages in the following variables<sup>14</sup>:

- particular matter concentration (33), the protection of threatened species (30),
- access to improved drinking water (42),
- timeliness of T&T data (48),
- presence of major car rental companies (1),
- individuals using the Internet (42), fixed telephone lines (48),
- purchasing power parity (35),
- availability of qualified labor (29): hiring and firing practices (38),
- HIV prevalence (1), business impact of HIV/AIDS (2), life expectancy (48),
- quality of the natural environment (20), marine protected areas (47),
- seats at sports stadiums (33).

It is worth mentioning that BaH has competitive advantages in two pillars: 1) the 3<sup>rd</sup> one, which is related to *safety and security* (29), and it consists of business costs of crime and violence (38), reliability of police services (45),

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<sup>14</sup>Since the Table 1 provides a detailed overview of the competitive position of BaH, at this point we will mention and discuss only the most important advantages and disadvantages. According to the guidance provided in the report, BaH has competitive advantages in all indicators ranked above 51.

pokretača ekonomskog rasta i stvaranja novih radnih mjesta. Bosna i Hercegovina, prema ukupnom plasmanu, zauzima 90. mjesto na ljestvici turističke konkurentnosti, što je skroman porast u odnosu na raniji izvještaj. Ipak, baš kao i ranijih godina, Bosna i Hercegovina se, zajedno sa Srbijom i Moldavijom, nalazi na samom dnu liste evropskih zemalja zbog čega je neophodno, kako se navodi u izvještaju, uložiti značajna sredstva u poboljšanje infrastrukture neophodne da podrži rast sektora putovanja i turizma. Naime, rezultati jasno pokazuju da najkonkurentnije zemlje na svijetu imaju i podržavajući poslovni okvir i prirodne resurse te da ulažu napore u stvaranje okruženja koje podstiče razvoj sektora turizma i putovanja.

U odnosu na druge analizirane zemlje, smatra se da Bosna i Hercegovina ima istaknute konkurentske prednosti u sljedećim oblastima<sup>14</sup>:

- koncentracija štetnih materija (33), zaštita ugroženih vrsta (30),
- zastupljenost pitke vode (42),
- pravovremenost podataka iz oblasti putovanja i turizma (48),
- prisustvo glavnih rent-a-car kompanija (1),
- broj korisnika interneta (42), broj fiksnih telefonskih linija (48),
- paritet kupovne moći (35),
- dostupnost kvalifikovane radne snage (29): praksa zapošljavanja i otpuštanja (38),
- uticaj HIV-a na poslovanje (2), prosječan životni vijek stanovništva (48),
- kvalitet prirodne sredine (20), zaštićena priobalna područja (47),
- broj sjedišta na sportskim stadionima (33).

Vrijedi istaći konkurentske prednosti koje je BiH ostvarila u cijelim stubovima i u to u trećem koji se odnosi na *bezbjednost i zaštitu* (29), a obuhvata uticaj kriminala i nasilja na poslovanje (38), pouzdanost policijskih službi (45), broj saobraćajnih nesreća (30) i uticaj terorizma na poslovanje (10), te u dvanaestom stubu koji pokriva pitanja *sklonosti ka putovanjima i turizmu* (49): odnos stanovništva prema stranim posjetiocima (8), preporučena dužina poslovnih putovanja (28).

Kada je riječ o najvećim nedostacima Bosne i Hercegovine, bitno je izdvojiti gotovo sve ostalo. Naime, Bosna i Hercegovina je nekonkurentna prema više indikatora u cijelim stubovima: *pravila i propisi* (imovinska prava, uticaj pravila i propisa na direktne strane investicije, transparentnost vladine politike, vrijeme potrebno za pokretanje biznisa), *održivost životne sredine* (strogost propisa o zaštiti životne sredine, sprovođenje propisa o zaštiti životne sredine, održivi razvoj industrije putovanja i turizma, emisiji

<sup>14</sup>Budući da je u Tabeli 1 dat detaljan pregled konkurentskog položaja BiH, ovdje ćemo navesti i prodiskutovati samo najznačajnije prednosti i nedostatke. Prema snjericama datim u izvještaju, BiH ima konkurentske prednosti u svim indikatorima rangiranim iznad 51.



road traffic accidents (30) and business costs of terrorism (10), 2) and in the 12<sup>th</sup> pillar that covers *affinity for travel and tourism* (49): attitude of population toward foreign visitors (8), extension of business trips recommended (28).

When it comes to main disadvantages of Bosnia and Herzegovina, we can emphasize almost everything else. Unfortunately, BaH is not competitive in a number of indicators in entire pillars as follows: *policy rules and regulations* (property rights, business impact of rules on FDI, transparency of government policymaking, number of days to start a business), *environmental sustainability* (stringency of environmental regulation, enforcement of environmental regulation, sustainability of travel and tourism industry development, carbon dioxide emission, environment treaty ratification), *prioritization of travel and tourism* (government prioritization of the T&T industry, T&T government expenditure, effectiveness of marketing to attract tourists, comprehensiveness of T&T data). Moreover, according to the overall infrastructure, BaH ranks at the very bottom of the world rankings, (*air transport infrastructure* puts BaH at the 135<sup>th</sup>, and *ground transport infrastructure* at the 130<sup>th</sup> place). Price competitiveness in T&T industry (107) is not in our favor either, while, interestingly enough, such numerous comparative advantages BaH has in natural resources remain decapitalized (number of world heritage natural sites, total known species, terrestrial biome protection). Other competitive disadvantages are in the area of quality of the educational system, local availability of specialized research and training, extent of staff training,...

Authors have different views on future trends in tourism. However, they all agree in their predictions that tourism in the future will depend on the development of border areas. The size and structure of the population, economic potential, technological innovations, political and cultural trends are the most frequently mentioned factors that will affect the directions of tourism development. "*The future of tourism will depend largely on factors outside this phenomenon, but the factors within itself*"<sup>15</sup>.

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15 Vukonić, B., *Rethinking of Education and Training for Tourism*, Graduate School of Economics & Business, Zagreb, 2002, p. 496.

ja ugljen-dioksida, broj potpisanih sporazuma iz oblasti zaštite životne sredine), *prioritet putovanja i tuzima* (davanje prioriteta industriji putovanja i turizma od strane vlade, procenat državnog budžeta namijenjen industriji putovanja i turizma, efikasnost marketinga u privlačenju turista, sveobuhvatnost podataka iz oblasti putovanja i turizma). Nadalje, prema sveukupnoj infrastrukturi, BiH se nalazi na samom dnu svjetske rang liste turističkih destinacija (*infrastruktura vazdušnog saobraćaja* stavlja nas na 135, a *infrastruktura kopnenog saobraćaja* na 130. mjesto). Konkurentnost cijena u industriji putovanja i turizma (107), takođe, nije znatno povoljnija, a zanimljivo je da tolike komparativne prednosti BiH u oblasti prirodnih potencijala masovno ostaju neiskorišćene (prirodni potencijali (107): zaštićena područja (134)). Nažalost, primjetan je i sve lošiji kvalitet obrazovnog sistema, nemogućnost specijalizovanih istraživanja na lokalnom nivou, slaba i rijetka obuka kadra,...

Autori imaju različita gledišta na kretanje turizma u budućnosti. Ipak, svi se slažu u svojim prognozama, da turizam u budućnosti zavisi od razvoja graničnih područja. Veličina i struktura stanovništva, ekonomski potencijal, tehnološke inovacije, politička i kulturna kretanja predstavljaju najčešće navedene faktore od kojih zavise pravci razvoja turizma u narednom periodu. „*Budućnost turizma zavisit će u većoj mjeri od faktora izvan ovog fenomena, nego od faktora u njemu samome*“<sup>15</sup>.

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15 Vukonić, B., *Rethinking of Education and Training for Tourism*, Graduate School of Economics & Business, Zagreb, 2002, str. 496.

Table 1: Detailed overview of the travel and tourism competitiveness of Bosnia and Herzegovina

Subin-dex	INDICATOR	Score	Rank
T&T regulatory framework	1st pillar: Policy rules and regulations	4.0	104
	Prevalence of foreign ownership	4.4	85
	Property rights	3.3	118
	Business impact of rules on FDI	4.0	105
	Visa requirements, no. of countries*	69.0	90
	Openness bilateral ASAs (0-38)*	10.0	80
	Transparency of government policymaking	3.8	109
	No. of days to start a business*	37	118
	Cost to start a business, % GNI/capita*	14.9	88
	GATS commitment restrictiveness (0-100)*	n/a	n/a
	2nd pillar: Environmental sustainability	4.1	113
	Stringency of environmental regulation	2.8	129
	Enforcement of environmental regulation	2.9	109
	Sustainability of T&T industry development	3.6	112
	Carbon dioxide emission, million tons/capita*	8.3	108
	Particulate matter concentration, $\mu\text{g}/\text{m}^3$ *	18.8	33
	Threatened species, %*	2.9	30
	Environment treaty ratification (0-25)*	14	130
	3rd pillar: Safety and security	5.6	29
	Business costs of crime and violence	5.4	38
	Reliability of police services	4.9	45
	Road traffic accidents/100,000 pop.*	10.9	30
	Business costs of terrorism	6.4	10
	4th pillar: Health and hygiene	5.2	59
	Physician density/1,000 pop.*	1.6	71
	Access to improved sanitation, % pop.*	95.0	52
	Access to improved drinking water, % pop.*	99.0	42
	Hospital beds/10,000 pop.*	34.0	53
	5th pillar: Prioritization of Travel & Tourism	3.5	116
	Government prioritization of the T&T industry	3.8	133
	T&T gov't expenditure, % gov't budget*	1.1	129
	Effectiveness of marketing to attract tourists	3.8	105
Comprehensiveness of T&T data (0-120)*	48.0	100	
Timeliness of T&T data (0-18)*	15.5	48	

Tabela 1: Detaljan prikaz konkurentskog položaja BiH u oblasti putovanja i turizma

Podindeks	INDIKATOR	Index	Položaj
Zakonodavna regulativa	1. stub: Pravila i propisi	4,0	104
	Zastupljenost stranog vlasništva	4,4	85
	Imovinska prava	3,3	118
	Uticaj pravila i propisa na direktne strane investicije	4,0	105
	Broj zemalja koje trebaju vizu*	69,0	90
	Broj bilateralnih sporazuma iz oblasti avio-saobraćaja*	10,0	80
	Transparentnost vladine politike	3,8	109
	Vrijeme potrebno za pokretanje biznisa*	37	118
	Troškovi potrebni za pokretanje biznisa*	14,9	88
	Obaveze u oblasti turizma preuzete na osnovu GATS*	n/a	n/a
	2. stub: Održivost životne sredine	4,1	113
	Strogost propisa o zaštiti životne sredine	2,8	129
	Sprovođenje propisa o zaštiti životne sredine	2,9	109
	Održivi razvoj industrije putovanja i turizma	3,6	112
	Emisija ugljen-dioksida*	8,3	108
	Koncentracija štetnih materija*	18,8	33
	Zaštita ugroženih vrsta*	2,9	30
	Broj potpisanih sporazuma iz oblasti zaštite životne sredine*	14	130
	3. stub: Bezbjednost i zaštita	5,6	29
	Uticaj kriminala i nasilja na poslovanje	5,4	38
	Pouzdanost policijskih službi	4,9	45
	Broj saobraćajnih nesreća*	10,9	30
	Uticaj terorizma na poslovanje	6,4	10
	4. stub: Zdravlje i higijena	5,2	59
	Broj ljekara (na 1.000 stanovnika)*	1,6	71
	Higijenski uslovi (sanitarni čvorovi, kanalizacione mreže)*	95,0	52
	Zastupljenost pitke vode*	99,0	42
	Broj bolničkih ležajeva (na 10.000 stanovnika)*	34,0	53
	5. stub: Prioritet putovanja i turizma	3,5	116
	Davanje prioriteta industriji putovanja i turizma od strane vlade	3,8	133
	Procenat državnog budžeta namijenjen industriji putovanja i turizma*	1,1	129
	Efikasnost marketinga u privlačenju turista	3,8	105
	Sveobuhvatnost podataka iz oblasti putovanja i turizma*	48,0	100
	Pravovremenost podataka iz oblasti putovanja i turizma*	15,5	48

T&T business environment and infrastructure	6th pillar: Air transport infrastructure	1.8	135
	Quality of air transport infrastructure	2.3	139
	Airline seat kms/week, dom., millions*	0.0	104
	Airline seat kms/week, int'l, millions*	7.1	133
	Departures/1,000 pop.*	0.5	110
	Airport density/million pop.*	0.8	56
	No. of operating airlines*	12.5	101
	International air transport network	2.6	139
	7th pillar: Ground transport infrastructure	2.6	130
	Quality of roads	2.5	132
	Quality of railroad infrastructure	2.5	72
	Quality of port infrastructure	1.7	138
	Quality of ground transport network	3.6	121
	Road density/million pop.*	43.0	61
	8th pillar: Tourism infrastructure	4.2	65
	Hotel rooms/100 pop.*	0.3	76
	Presence of major car rental co. (1-7)*	7	1
	ATMs accepting Visa cards/million pop.*	309.7	63
	9th pillar: ICT infrastructure	3.3	64
	ICT use for B-to-B transactions	4.5	104
	ICT use for B-to-C transactions	4.2	88
	Individuals using the Internet, %*	60.0	42
	Fixed telephone lines/100 pop.*	25.5	48
	Broadband Internet subscribers/100 pop.*	9.7	59
	Mobile telephone subscriptions/100 pop.*	84.5	102
	Mobile broadband subscriptions/100 pop.*	9.2	77
	10th pillar: Price competitiveness in T&T industry	4.1	107
	Ticket taxes and airport charges (0-100)*	56.9	123
	Purchasing power parity*	0.5	35
	Fuel price, US\$ cents/liter*	142.0	99
Extent and effect of taxation	3.1	105	
Hotel price index, US\$*	n/a	n/a	

Poslovno okruženje i infrastruktura	6. stub: Infrastruktura vazdušnog saobraćaja	1,8	135
	Kvalitet infastrukture vazdušnog saobraćaja	2,3	139
	Raspoloživost sjedišta u avionu u domaćem avio-saobraćaju*	0,0	104
	Raspoloživost sjedišta u avionu u međunarodnom avio-saobraćaju*	7,1	133
	Broj poletanja na 1000 stanovnika*	0,5	110
	Broj/gustina aerodroma (na milion stanovnika)*	0,8	56
	Broj operativnih avio-kompanija*	12,5	101
	Mreža međunarodnog vazdušnog saobraćaja	2,6	139
	7. stub: Infrastruktura kopnenog saobraćaja	2,6	130
	Kvalitet puteva	2,5	132
	Kvalitet željezničke infrastrukture	2,5	72
	Kvalitet luka	1,7	138
	Kvalitet mreže kopnenog saobraćaja	3,6	121
	Gustina puteva*	43,0	61
	8. stub: Turistička infrastruktura	4,2	65
	Broj hotelskih soba (na 100 stanovnika)*	0,3	76
	Prisustvo vodećih rent-a-car kompanija*	7	1
	Zastupljenost bankomata koji prihvataju Visa kartice*	309,7	63
	9. stub: Infrastruktura IK tehnologija	3,3	64
	Upotreba IKT za poslovnu korespondenciju i transakcije među preduzećima	4,5	104
	Upotreba interneta na relaciji preduzeća-potrošači	4,2	88
	Broj korisnika interneta*	60,0	42
	Broj fiksnih telefonskih linija (na 100 stanovnika)*	25,5	48
	Broj pretplatnika brzog interneta (na 100 stanovnika)*	9,7	59
	Broj pretplatnika mobilne telefonije (na 100 stanovnika)*	84,5	102
	Broj pretplatnika mobilne mreže (na 100 stanovnika)*	9,2	77
	10. stub: Konkurentnost cijena u industriji putovanja i turizma	4,1	107
	Visina cijena avio-karata i aerodromskih usluga*	56,9	123
	Paritet kupovne moći*	0,5	35
	Cijena goriva*	142,0	99
	Obim i efekat oporezivanja	3,1	105
	Cijena hotelskog smještaja*	n/a	n/a

T&T human, cultural, and natural resources	11th pillar: Human resources	4.8	76
	Education and training	4.3	94
	Primary education enrollment, net %*	87.0	109
	Secondary education enrollment, gross %*	91.1	59
	Quality of the educational system	3.1	105
	Local availability specialized research & training	3.4	112
	Extent of staff training	3.5	107
	Availability of qualified labor	5.3	29
	Hiring and firing practices	4.4	38
	Ease of hiring foreign labor	4.1	76
	HIV prevalence, % adult pop.*	n/a	1
	Business impact of HIV/AIDS	6.7	2
	Life expectancy, years*	75.6	48
	12th pillar: Affinity for Travel & Tourism	4.8	49
	Tourism openness, % of GDP*	4.5	73
	Attitude of population toward foreign visitors	6.6	8
	Extension of business trips recommended	5.9	28
	Degree of customer orientation	4.5	82
	13th pillar: Natural resources	2.9	107
	No. of World Heritage natural sites*	0	79
	Quality of the natural environment	5.5	20
	Total known species*	378	107
	Terrestrial biome protection (0–17%)*	0.5	134
	Marine protected areas, %*	0.8	47
	14th pillar: Cultural resources	2.1	79
	No. of World Heritage cultural sites*	2	88
	Sports stadiums, seats/million pop.*	72.431.1	33
	No. of int'l fairs and exhibitions*	7.0	86
	Creative industries exports, % of world total*	0.0	69

The following trends/niches are identified as the most rational advantages that the BaH tourism development can rely on<sup>16</sup>:

1. changing needs of people
2. physical and psychological recovery
3. growth in demand for innovative contents
4. back to nature
5. new travel motivations

16 Arnaut, E., „Globalizacijski procesi u turizmu i utjecaj megatrendova na konkurentnost turističke industrije u BiH“, *Zbornik naučnih radova Globalizacija u turizmu*, Univerzitet „Vitez“, Travnik, 2010.

Ljudski, kulturni i prirodni potencijali	11. stub: Ljudski potencijali	4,8	76
	Obuka i obrazovanje	4,3	94
	Stopa upisa u osnovnu školu*	87,0	109
	Stopa upisa u srednju školu*	91,1	59
	Kvalitet obrazovnog sistema	3,1	105
	Mogućnost specijalizovanih istraživanja i obuke na lokalnom nivou	3,4	112
	Obim obuke osoblja	3,5	107
	Dostupnost kvalifikovane radne snage	5,3	29
	Praksa zapošljavanja i otpuštanja	4,4	38
	Lakoća zapošljavanja inostrane radne snage	4,1	76
	Učestalost HIV-a*	n/a	1
	Uticaj HIV-a na poslovanje	6,7	2
	Prosječan životni vijek stanovništva*	75,6	48
	12. stub: Sklonost ka putovanjima i turizmu	4,8	49
	Otvorenost turizma*	4,5	73
	Odnos stanovništva prema stranim posjetiocima	6,6	8
	Preporučena dužina poslovnih putovanja	5,9	28
	Stepen orijentacije kupaca	4,5	82
	13. stub: Prirodni potencijali	2,9	107
	Broj lokacija prirodne svjetske baštine*	0	79
	Kvalitet prirodne sredine	5,5	20
	Ukupan broj poznatih životinjskih vrsta*	378	107
	Zaštićena područja*	0,5	134
	Zaštićena priobalna područja*	0,8	47
	14. stub: Kulturni potencijali	2,1	79
	Broj kulturnih znamenitosti od svjetskog značaja*	2	88
	Broj sjedišta na sportskim stadionima*	72.431,1	33
	Broj međunarodnih sajmova i izložbi*	7,0	86
	Izvoz proizvoda kreativne industrije*	0,0	69

Za razvoj turizma u BiH identifikovani su sljedeći trendovi-niše koji se mogu najracionalnije iskoristiti<sup>16</sup>:

1. Izmijenjene potrebe ljudi
2. Fizički i duševni oporavak
3. Rast potražnje za inovativnim sadržajima
4. Povratak prirodi
5. Novi motivi putovanja

16 Arnaut, E. „Globalizacijski procesi u turizmu i utjecaj megatrendova na konkurentnost turističke industrije u BiH“, *Zbornik naučnih radova Globalizacija u turizmu*, Univerzitet „Vitez“, Travnik, 2010.



The global industry is moving toward niche travel and finding new unexplored destinations. Therefore, BaH is positioned to compete in the global market. International growth in terms of niche tourism such as nature/eco-tourism, adventure, religious, sports and recreational tourism, health spa, cultural and educational tourism represent the comparative advantages of Bosnia and Herzegovina in terms of its overall supply. Those comparative advantages should be transformed into competitive advantages in the future and this should be the primary task of all the actors and creators of tourism policy in Bosnia and Herzegovina.

Nearly every citizen in Bosnia and Herzegovina knows that the country has a special range of natural, cultural and historical resources. These, so far only comparative advantages, together with the geographical accessibility of the country, offer great opportunities to attract visitors. Although it utilizes only a small part of available resources, the tourism industry of BaH is continually growing in number of tourists. Foreign tourist arrivals have roughly doubled over the last five years. Only in 2013, BaH was visited by 850,000 tourists, which is an increase of 13 percent compared to 2012<sup>17</sup>. However, other data are not so encouraging. The total contribution of tourism to GDP of BaH is far below the average of competitive countries. Tourism of competitive countries participates approximately 14 percent in GDP, while that percentage in BaH moves just a bit above seven percent<sup>18</sup>. Out of total employment rates, tourism participates with hardly two percent in direct employment in BaH, which is also below the average<sup>19</sup>.

Unfortunately, the impact of tourism in BaH remains far below its potential due to different challenges that limit the global competitiveness of BaH tourism. This includes issues such as the lack of a strong development policy for the tourism sector within the local government, underdevelopment and the inadequate management of numerous tourist sites, the lack of international standards and certification in the field of tourism, the lack of maintenance of urban and rural areas, weak institutional and business links with international markets and still unfavorable global image of BaH. In July 2013, the European Union blocked two projects dedicated to the tourism industry and small and medium-sized enterprises, worth around 4.5 million Euros. From that day until today the problem is still waiting for a solution, while local authorities do not pay attention to missed opportunities and

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17 Agency for Statistics of Bosnia and Herzegovina, *First Release (Tourism Statistics)*, Year VII, No. 12, Sarajevo, 2014.

18 World Travel & Tourism Council, *Travel & Tourism Economic Impact 2012 Bosnia and Herzegovina*, London, 2012.

19 Agency for Statistics of Bosnia and Herzegovina, *First Release (Persons in Paid Employment by Activity)*, Year VIII, No. 1, Sarajevo, 2014.

Globalna industrija se pomjera prema *niche* putovanjima i traženju novih neistraženih destinacija. Stoga je BiH pozicionirana da može konkurisati na svjetskom tržištu. Međunarodni rast u pogledu turističkih niša kao što su prirodni/eko turizam, avanturistički, vjerski, sportsko-rekreativni turizam, zdravstveno-banjski, kulturni i obrazovni turizam predstavljaju komparativne prednosti Bosne i Hercegovine u smislu njene cjelokupne ponude. Te komparativne prednosti potrebno je transformisati u konkurentske prednosti u budućem periodu i to je primarni zadatak svih aktera i kreatora turističke politike u Bosni i Hercegovini.

Skoro svakom njenom građaninu je sasvim jasno da Bosna i Hercegovina ima poseban spektar prirodnih, kulturnih i istorijskih potencijala. Ove, zasad samo komparativne prednosti, zajedno sa geografskom pristupačnošću zemlje pružaju velike mogućnosti za privlačenje posjetilaca. Mada se iskorišćava tek mali dio raspoloživih potencijala, turistička privreda BiH bilježi konstantan rast broja turista. Dolasci stranih turista su se otprilike udvostručili tokom posljednjih pet godina. Samo u 2013. godini BiH je posjetilo oko 850.000 turista, što je povećanje za 13 posto u odnosu na 2012. godinu<sup>17</sup>. Ipak, drugi podaci nisu tako ohrabrujući. Naime, ukupan doprinos sektora turizma u BDP-u BiH je daleko ispod prosjeka konkurentnih zemalja. U postocima gledano, u BDP-u konkurentnih zemalja turizam učestvuje približno 14 posto, dok se taj postotak u BiH kreće nešto više od sedam posto<sup>18</sup>. U direktnom zapošljavanju u BiH turizam ne učestvuje ni sa dva posto od ukupne zaposlenosti, što je takođe ispod prosjeka<sup>19</sup>.

Nažalost, učinak turizma u BiH ostaje daleko ispod potencijala zbog različitih izazova koji ograničavaju globalnu konkurentnost bosanskohercegovačkog turizma. Ovo podrazumijeva pitanja kao što su nedostatak snažne razvojne politike za sektor turizma u okviru lokalne samouprave, nedovoljna razvijenost i neadekvatno upravljanje brojnim turističkim lokacijama, nedostatak međunarodnih standarda i sertifikacije u oblasti turizma, neuklanjanje otpada i neodržavanje urbanih i ruralnih sredina, slabe institucionalne i poslovne veze sa međunarodnim tržištima, te još uvijek nepovoljna globalna slika BiH, čijem rješavanju se nije pristupilo efikasnom kampanjom brendiranja i marketinga zemlje. Evropska unija je u julu 2013. godine blokirala dva projekta namijenjena turističkoj industriji i malim i srednjim

17 Agencija za statistiku Bosne i Hercegovine, *Saopštenje (statistika turizma)*, god. VII, br. 12, Sarajevo, 2014.

18 World Travel & Tourism Council, *Travel & Tourism Economic Impact 2012 Bosnia and Herzegovina*, London, 2012.

19 Agencija za statistiku Bosne i Hercegovine, *Saopštenje (zaposleni po djelatnostima)*, god. VIII, br. 1, Sarajevo, 2014.

projects that could improve the economic situation in Bosnia and Herzegovina. It seems that old reasons and political battles take their toll on one of the most promising sectors of BaH economy. The key question is how tourism, as an economic activity that all but the current government see as prosperous, "strategic activity" in Bosnia and Herzegovina, can be transformed and integrated into the global tourism industry.

## CONCLUSION

According to the forecasts of relevant international organizations<sup>20</sup>, tourism should become a strategic industry that will contribute to economic prosperity, the economic growth and development of the national economy, because tourism can, with its multiplicative character as well as other functions, explicitly affect certain macroeconomic indicators and the balance of payments in BaH. It is undisputed that the issue of tourism development in Bosnia and Herzegovina and the creation of conditions for a respectable and competitive tourism industry in BaH is of great importance, especially in times of difficult social situation that numerous categories of BaH citizens are facing. Thus, it is necessary to approach this problem systematically and try to take advantage of contemporary competitive challenges and global trends in the world tourism industry in order to strengthen the competitiveness of the BaH tourism.

The successful tourism development strategy in BaH must create a genuine and attractive image of BaH as a tourism destination and initiate the process of branding not only the targeted tourism destinations but the entire tourism. Given the outstanding natural beauty of the land and the uniqueness of its cultural heritage, the potential is certainly there. However, the lack of a strategic approach at the state level remains the main problem of tourism development and integration into the world, as well as the European, tourism industry. It is the only way to attract foreign investors and, through projects of high quality, get the EU pre-accession funds, and ultimately reinforce the most promising sector of the local economy.

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<sup>20</sup> According to UNWTO's Tourism 2020 Vision.

preduzećima, vrijedna oko 4,5 miliona evra. Od tog dana pa do danas problem i dalje čeka na rješenje, a bosanskohercegovačke vlasti ne obraćaju pažnju na propuštene prilike i projekte koji su mogli poboljšati ekonomsku situaciju u Bosni i Hercegovini. Čini se da stari razlozi i političke borbe uzimaju danak jednoj od najperspektivnijih grana bosanskohercegovačke privrede. Ključno pitanje je kako turizam, kao privrednu djelatnost koju svi osim aktuelne vlasti posmatraju kao prosperitetnu, „stratešku djelatnost“ u BiH, transformisati i integrisati u svjetsku turističku industriju.

## ZAKLJUČAK

Prema predviđanjima relevantnih međunarodnih organizacija<sup>20</sup>, turizam bi trebao da postane strateška privredna grana koja će doprinijeti privrednom prosperitetu, ekonomskom rastu i razvoju nacionalne ekonomije, jer svojim multiplikativnim karakterom kao i drugim funkcijama, turizam može eksplicitno uticati na pojedine makroekonomske indikatore i uravnoteženje platnog bilansa BiH. Neosporno je da je pitanje razvoja turizma u Bosni i Hercegovini i stvaranje pretpostavki za razvoj respektabilne i konkurentne turističke industrije BiH od velike važnosti, pogotovo u vremenu teške socijalne situacije u kojoj se nalaze brojne kategorije građana BiH. Upravo zbog toga, potrebno je sistemski pristupiti ovoj problematici i pokušati iskoristiti savremene konkurentne izazove i globalne trendove u svjetskoj turističkoj industriji u cilju jačanja konkurentnosti BiH turizma.

Uspješna strategija razvoja turizma u BiH mora izgraditi originalan i atraktivan imidž, te inicirati proces brendiranja kako ciljnih turističkih destinacija, tako i cjelokupnog turizma. Potencijal svakako postoji, imajući u vidu izvanrednu prirodnu ljepotu zemlje i jedinstvenost njenog kulturnog nasljeđa. Međutim, nepostojanje strateškog pristupa na državnom nivou predstavlja osnovni problem razvoja i integrisanja u svjetsku turističku industriju i globalne kao i evropske turističke tokove. Jedino na taj način je moguće privući strane investitore i putem kvalitetnih projekata dobiti sredstva predpristupnih fondova Evropske unije, te konačno ojačati najperspektivniji sektor lokalne privrede.

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<sup>20</sup> Prema Viziji razvoja turizma do 2020. godine Svjetske turističke organizacije.

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