

**Review paper**

## **IDENTIFYING THE FACTORS OF TOURISM COMPETITIVENESS LEVEL IN THE SOUTHEASTERN EUROPEAN COUNTRIES**

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**Abstract.** *The aim of this paper is to identify key factors for competitiveness enhancement and tourism sector development in Southeastern European (SEE) countries. For the purposes of this research, factors (the so-called, pillars and subindexes) of the Travel and Tourism Competitiveness Index (TTCI) have been analyzed by applying proper statistical models (descriptive statistics, correlation analysis, and regression analysis). Considering the fact that there is a high level of correlation between the Global Competitiveness Index (GCI) and TTCI, the influence of TTCI factors on GCI in SEE countries has been analyzed within this paper. This research points out the fact that human resources represent significant factor SEE countries should pay more attention to, when building up new strategies and programs of tourism sector development in function of increasing the competitiveness level and the growth of that sector.*

**Key Words:** *tourism, Travel and Tourism Competitiveness Index, analysis, human resources.*

### INTRODUCTION

Tourism is one of the most dynamic service business activities both in the developed and developing countries. This can be proved by the data about the number of tourists in the world which is growing constantly. The number of tourists has increased from 25 million in 1950 to 277 million in 1980, 435 million in 1990, 675 million in 2000 and 935 million in 2010 [18, p. 45]. According to the *World Tourist Organization (WTO)*, there is an expectation that the tourism sector will gain 1.6 billion tourist arrivals by 2020, out of which 717 million will be in Europe. "Focus of the tourism organizations and destinations

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has shifted from simply attracting more tourists to making the tourist destinations more competitive" [1, p. 979].

On the level of national economy, the greatest importance for the creators of tourism development policy is the identification of national tourist potentials and tourism sector performances as well as their benchmark to other countries. "Tourism is the only service activity that can potentially provide trading opportunities for all nations, regardless of their level of development. However, it is also a sector where there is clearly an uneven distribution of benefits that is largely dependent on countries' ability to strengthen their performance in the global economy, which in turn requires improving their competitiveness" [3, p. 29]. Tourism competitiveness improvement is also very important for the development of national competitiveness.

#### THEORETICAL BACKGROUND AND RESEARCH METHODOLOGY

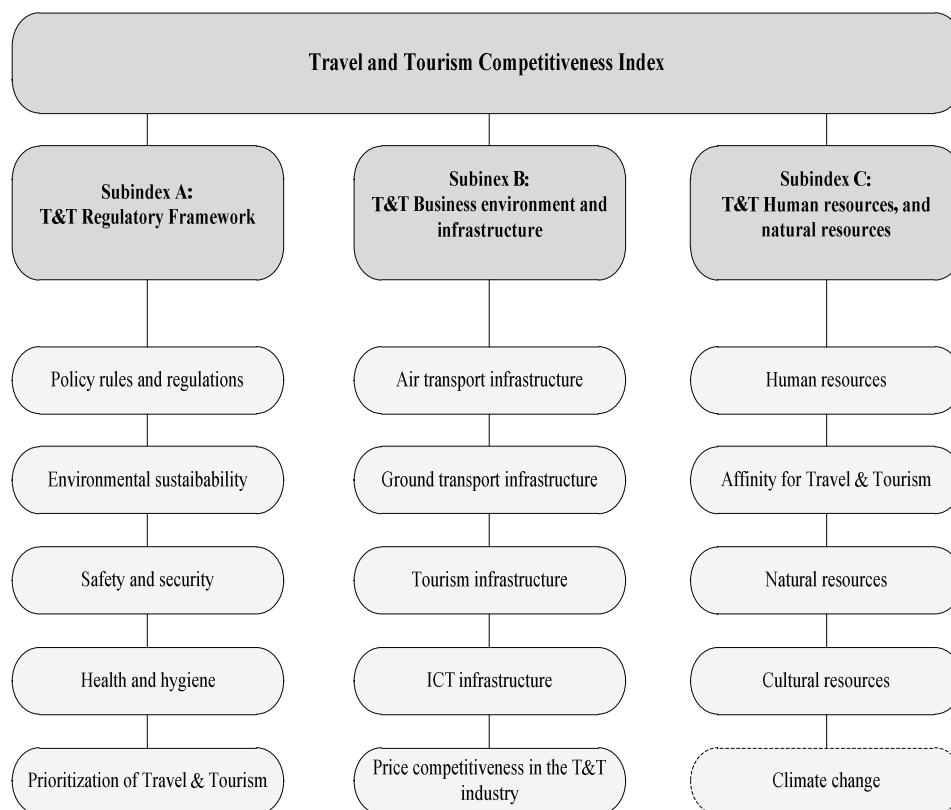
Competitiveness within tourism can be observed at three levels: enterprise level, sector level and national economy level [6, p.88]. "At the international level, competitiveness can be defined as the ability of an economy to attract the demand for its exports and the investment to supply that demand, all within social norms that result in an improved standard of living for its citizens" [3, p. 31].

However, competitiveness cannot be connected only with the economic growth or economic characteristics of the country, but tourism "should take into consideration the "soft factors" of competitiveness, such as the environment, quality of life, technology, knowledge, etc." [2, p. 344]. In order to provide the opportunity for the policy makers to assess the tourism potential performances and comparative advantages for tourism development, it is very important to benchmark with tourism capacities and competitive advantages of the tourism sector in other countries. Hence, for benchmarking analysis of tourism, it is of the highest importance to calculate TTCI (*The Travel and Tourism Competitiveness Index*). This methodology has been created by the *World Economic Forum* (WEF) [17].

The main goal of TTCI is to measure factors and policies which influence the attractiveness and development of the tourism sector in different countries [5, p.46]. The index basis consists of three "subindexes", where each of those subindexes consists of a certain number of pillars that help to calculate and score the competitiveness. "Through detailed analysis of each pillar and subpillar of the Index, businesses and governments can address their particular challenges to the sector's growth" [18, p. xiii]. TTCI is composed of three subindexes: 1) *T&T regulatory framework*, 2) *T&T business environment and infrastructure*, and 3) *T&T human, cultural, and natural resources*. Each of those subindexes is composed of a certain number of pillars shown in Figure 1.

WEF defines competitiveness as "the set of institutions, policies, and factors that determine the level of productivity of a country" [16, p.4]. Competitiveness of national economies is measured by GCI (*Global Competitiveness Index*) which consists of 12 pillars. The pillars of GCI are: *Institutions, Infrastructure, Macroeconomic environment, Health and primary education, Higher education and training, Goods market efficiency, Labour market efficiency, Financial market development, Technological readiness, Mar-*

*ket size, Business sophistication, Innovation* [16, p. 9]. All of the pillars represent factors which, directly or indirectly, influence national economy competitiveness.



**Fig. 1** Elements of the TTCI [18, p. 5]

The subject of this analysis is to examine the interdependence between the *TTCI* and *GCI*. The aim of this paper is to identify subindex i.e. pillar within *TTCI* which is critical for increasing tourism competitiveness, but at the same time for increasing national economy competitiveness. Then, the task of this study is to explore the direction and the level of correlation between the identified pillar of *TTCI*, on one side, and *TTCI* and *GCI*, on the other side. Also, the task is to research the degree of influence of the subindexes and pillars within the *TTCI* indicator on its height.

Information base for this analysis consists of: *Reports of WEF about competitiveness level of national economies* and *Reports of WEF about tourism competitiveness*. For this research the following statistical methods are used: descriptive statistics, correlation analysis, and regression analysis.

THEORETICAL RESEARCH CONTEXT:  
THE INTERDEPENDENCE BETWEEN GCI AND TTCI FOR SEE COUNTRIES

The starting point of the research is the interdependence between GCI and TTCI. According to the GCI for 2011 (Table 1), out of the countries in the region, Hungary has the best rated competitiveness by the WEF (48<sup>th</sup> position in the world), then Slovenia (57<sup>th</sup> position), Montenegro (60<sup>th</sup> position), Bulgaria (74<sup>th</sup> position), Romania (77<sup>th</sup> position), Albania (78<sup>th</sup> position), FYR Macedonia (79<sup>th</sup> position), and at the bottom Serbia (95<sup>th</sup> position) and Bosnia and Herzegovina (100<sup>th</sup> position). If the rank change in 2011 compared to 2009 is observed, Slovenia, Croatia, Serbia and Romania have decreased in the rank, while other countries improved their competitiveness rank. A high rank and competitiveness score decrease of Slovenia is noticeable (rank decrease by 20 positions in 2011 compared to 2009) as well as the increase of competitiveness rank and score of Albania (rank increase by 18 positions in 2011 compared to 2009).

**Table 1** Global Competitiveness Index 2009-2011 [15, 16]

Country	2009		2010		2011		Rank change		
	Rank	Score	Rank	Score	Rank	Score	2010/2009	2011/2010	2011/2009
Slovenia	37	4.55	45	4.42	57	4.30	↓8	↓12	↓20
Croatia	72	4.03	77	4.04	76	4.08	↓5	↑1	↓4
Montenegro	62	4.16	49	4.36	60	4.27	↑13	↓11	↑2
Albania	96	3.72	88	3.94	78	4.06	↑8	-10	↑18
Macedonia	84	3.95	79	4.02	79	4.05	↑5	-	↑5
Serbia	93	3.77	96	3.84	95	3.88	↓3	↑1	↓2
B&H	109	3.53	102	3.70	100	3.83	↑7	↑2	↑9
Hungary	58	4.22	52	4.33	48	4.36	↑6	↑4	↑10
Bulgaria	76	4.02	71	4.13	74	4.16	↑5	↓3	↑2
Romania	64	4.11	67	4.16	77	4.08	↓3	↓10	↓13

Out of 142 countries taken for the competitiveness analysis by the *World Economic Forum* for 2011, the lowest score value was 2.87 and the highest 5.74. The lowest value of competitiveness score, within the observed group of Southeastern European countries in 2011, was 3.83 (Bosnia and Herzegovina), and the highest 4.36 (Hungary). The average score for 142 countries is 4.20, which means that as much as 7 countries from the observed group has the competitiveness index which is below the average for all countries, and just three countries (Slovenia, Montenegro and Hungary) have the value of competitiveness index for 2011 above the average on the world level.

If TTCI is analyzed (Table 2), it is interesting to point out that all the countries within the observed group have increased in the competitiveness rank, but also there is an increase in the rank of this index for 2011 compared to 2009. Albania has the highest increase in tourist sector competitiveness (19 positions increase in the years observed), followed by Montenegro (16 positions increase), Bosnia and Herzegovina (tourism competitiveness increase by 10 positions).

**Table 2** Travel and Tourism Competitiveness Index in 2009 and 2011 for the SEE countries [17, 18]

Country	2009		2011		Rank change
	Rank	Score	Rank	Score	2011/2009
Slovenia	35	4.53	33	4.64	↑2
Croatia	34	4.54	34	4.61	–
Montenegro	52	4.29	36	4.56	↑16
Albania	90	3.68	71	4.01	↑19
Macedonia	80	3.81	76	3.96	↑4
Serbia	88	3.71	82	3.85	↑6
B&H	107	3.44	97	3.63	↑10
Hungary	38	4.45	38	4.54	–
Bulgaria	50	4.30	48	4.39	↑2
Romania	66	4.04	63	4.17	↑3

The lowest TTCI score in 2011 was 2.56, and the highest 5.68 on the global level. The average value of the TTCI, based on the 139 analyzed countries in the WEF report for 2011, was 4.08, which means that four countries within the observed group have the TTCI below the average on the global level (Albania, FYR Macedonia, Serbia and Bosnia and Herzegovina), while six other countries have the TTCI value above the average.

There is a strong direct correlation between two competitiveness indexes (GCI and TTCI) as shown in Table 3. It means that these indexes have a high level of correlation in intensity and direction.

**Table 3** Values of Spearman's rank correlation coefficient between GCI and TTCI for the SEE countries in 2011

Index	GCI 2011
GCI 2011	1
TTCI 2011	0.862* (0.001)

\*Correlation is significant at the level 0.01

A high level of correlation between these two competitiveness indexes as well as a positive change regarding tourism competitiveness growth in all countries observed, served as a basis for further analysis.

## RESEARCH RESULTS AND DISCUSSION

### a) Analysis of change in competitiveness scores of a certain subindexes within the TTCI 2011 compared to the previous period in SEE countries

TTCI is composed of three subindexes: *T&T regulatory framework*, *T&T Business environment and infrastructure*, and *T&T Human, cultural, and natural resources*, whose scores are shown in Table 4.

**Table 4** Subindexes of Travel and Tourism Competitiveness Index in 2009 and 2011 for the SEE countries [17, 18]

Country/ Subindexes	<i>T&amp;T Regulatory framework</i>			<i>T&amp;T Business environment and infrastructure</i>			<i>T&amp;T human, cultural, and natural resources</i>		
	2009 Score	2011 Score	Score change	2009 Score	2011 Score	Score change	2009 Score	2011 Score	Score change
Slovenia	5.13	5.19	↑0.06	4.53	4.70	↑0.17	3.94	4.03	↑0.09
Croatia	5.02	5.02	-	4.32	4.58	↑0.26	4.28	4.23	↓0.05
Montenegro	4.86	5.15	↑0.29	3.57	4.15	↑0.58	4.43	4.38	↓0.05
Albania	4.38	4.79	↑0.41	2.76	3.30	↑0.54	3.89	3.93	↑0.04
Macedonia	4.46	4.78	↑0.32	3.29	3.49	↑0.2	3.67	3.62	↓0.05
Serbia	4.35	4.57	↑0.22	3.20	3.39	↑0.19	3.57	3.60	↑0.03
B&H	4.11	4.24	↑0.13	2.96	3.14	↑0.18	3.25	3.49	↑0.24
Hungary	5.35	5.29	-0.06	4.06	4.28	↑0.22	3.95	4.06	↑0.11
Bulgaria	4.74	4.79	↑0.05	3.96	4.32	↑0.36	4.20	4.05	↓0.16
Romania	4.68	4.85	↑0.17	3.61	3.80	↑0.19	3.83	3.84	↑0.01

According to the subindex - *T&T regulatory framework*, all the countries in the region have improvement in the value of this subindex, except Hungary (decrease in value by 0.06).

All the countries observed gained significant improvements in subindex of *T&T Business environment and infrastructure*. This is obvious from the indicator of change in value of the second subindex which is positive for all the countries.

With subindex *T&T Human, cultural, and natural resources*, some changes are noted and they show fall in the subindex score in 2011 compared to 2009. So, four out of ten observed countries record a fall in the score of this subindex (Croatia, Montenegro, FYR Macedonia and Bulgaria).

The identified fall in the score of subindex *T&T human, cultural, and natural resources* in some countries within the observed group, served as a basis for deeper analysis of this subindex regarding its four pillars such as: *Human resources, Affinity for T&T, Natural resources, and Cultural resources*.

#### **b) Analysis of pillar's rank and score change within subindex T&T human, cultural, and natural resources**

By analyzing the rank change towards the pillars of subindex *T&T human, cultural, and natural resources* within the TTCI (Table 5), it has been concluded that a large number of analyzed countries has a fall in 2011 rank compared to 2009 in pillars regarding human resources. Half of the analyzed countries (Slovenia, Montenegro, FYR Macedonia, Serbia, Bulgaria, and Romania) have a fall in competitiveness rank of *Human resources* pillar.

**Table 5** Pillars of subindex T&T human, cultural, and natural resources within the TTCI – the rank change in 2011 compared to 2009 for the SEE countries [17, 18]

Country	T&T human, cultural, and natural resources											
	Human resources			Affinity for T&T			Natural resources			Cultural resources		
	2009 Rank	2011 Rank	Change	2009 Rank	2011 Rank	Change	2009 Rank	2011 Rank	Change	2009 Rank	2011 Rank	Change
Slovenia	36	42	↓6	70	49	↑21	79	64	↑15	54	58	↓4
Croatia	53	83	↓30	9	20	↓11	69	75	↓6	41	31	↑10
Montenegro	40	35	↑5	1	7	↓6	80	71	↑9	51	46	↑5
Albania	62	57	↑5	4	3	↑1	129	113	↑16	79	83	↓4
Macedonia	70	75	↓5	69	53	↑6	92	92	-	70	74	↓4
Serbia	54	76	↓22	83	66	↑17	126	123	↑3	64	59	↑5
B&H	109	77	↑32	92	58	↑34	123	121	↑2	81	75	↑6
Hungary	77	44	↑33	115	100	↑15	103	98	↑5	31	29	↑2
Bulgaria	65	71	↓6	18	51	↓33	68	78	↓10	36	37	↓1
Romania	58	63	↓5	105	95	↑10	85	94	↓9	49	41	↑8

If one analyzes the change in score of pillars within subindex *T&T human, cultural, and natural resources*, it can be observed that eight out of ten analyzed countries (all countries except B&H and Hungary), have a fall in *Human resources quality score*, as shown in Table 6.

**Table 6** Pillars of subindex T&T human, cultural, and natural resources within the TTCI – the change of score in 2011 compared to 2009 for the SEE countries [17, 18]

Country	T&T human, cultural, and natural resources											
	Human resources			Affinity for Travel and Tourism			Natural resources			Cultural resources		
	2009 Score	2011 Score	Change	2009 Score	2011 Score	Change	2009 Score	2011 Score	Change	2009 Score	2011 Score	Change
Slovenia	5.39	5.14	↓0.25	4.70	4.83	↑0.13	2.98	3.34	↑0.36	2.68	2.82	↑0.14
Croatia	5.17	4.73	↓0.44	5.84	5.30	↓0.54	3.11	3.00	↓0.11	2.99	3.90	↑0.91
Montenegro	5.28	5.21	↓0.07	6.68	5.92	↓0.76	2.97	3.23	↑0.26	2.77	3.18	↑0.41
Albania	5.10	5.00	↓0.10	6.44	6.33	↓0.11	2.06	2.38	↑0.32	1.96	1.99	↑0.03
Macedonia	5.03	4.82	↓0.21	4.71	4.77	↑0.06	2.76	2.70	↓0.06	2.19	2.18	↓0.01
Serbia	5.17	4.81	↓0.36	4.60	4.62	↑0.02	2.14	2.23	↑0.09	2.36	2.72	↑0.36
Bosnia and Herzegovina	4.36	4.81	↑0.45	4.54	4.74	↑0.20	2.19	2.25	↑0.06	1.92	2.17	↑0.25
Hungary	4.99	5.13	↑0.14	4.30	4.35	↑0.05	2.60	2.60	-	3.92	4.17	↑0.25
Bulgaria	5.09	4.88	↓0.21	5.45	4.80	↓0.65	3.11	2.98	↓0.13	3.13	3.52	↑0.39
Romania	5.15	4.93	↓0.22	4.44	4.42	↓0.02	2.87	2.69	↓0.18	2.85	3.33	↑0.48

### c) Correlation analysis of subindex T&T human, cultural, and natural resources and its pillars with the GCI and TTCI

The correlation degree of *T&T human, cultural, and natural resources* and its pillars, on one side, and the GCI and TTCI for 2011, on the other side, for the analyzed group of countries, has been determined in Table 7. So, this analysis determined that there is a negative correlation between pillar *Human capital* and TTCI for 2011, while all other pillars have positive correlation with the TTCI.

Also, if the correlation direction between pillars of subindex *T&T human, cultural, and natural resources* and GCI is analyzed, it can be observed that GCI has a positive correlation with all the pillars. However, if we look at the correlation degree of these pillars with GCI, the weakest correlation that can be identified exists between GCI and the pillar *Human capital*.

**Table 7** The correlation of subindex T&T human, cultural, and natural resources and its pillars with GCI and TTCI for 2011 within the analyzed group of countries

	GCI (score)	TTCI (score)	Pillar - Human capital (score)	Pillar - Affinity for T&T (score)	Pillar - Natural resources (score)	Pillar - Natural resources (score)	Subindex – T&T Human, cultural and natural resources (score)
GCI 2011 (score)	1.000						
TTCI 2011 (score)	0.392 (0.296)	1.000					
Pillar - Human resources (score)	0.042 (0.914)	-0.475 (0.196)	1.000				
Pillar - Affinity for T&T (score)	0.062 (0.874)	0.116 (0.765)	0.332 (0.383)	1.000			
Pillar - Natural resources (score)	0.639 (0.064)	0.722 (0.028)*	-0.158 (0.685)	0.160 (0.680)	1.000		
Pillar - Cultural resources (score)	0.070 (0.858)	0.582 (0.100)	-0.570 (0.109)	-0.433 (0.245)	0.049 (0.900)	1.000	
Subindex – Human, cultural and natural resources (score)	0.361 (0.339)	0.773 (0.015)*	-0.106 (0.786)	0.607 (0.083)	0.529 (0.143)	0.376 (0.319)	1.000

\*The correlation is significant at the level of 0.05.

### d) Analysis of influence of subindexes within TTCI on the TTCI

In further analysis the intention is to measure the influence of certain subindexes on the value of total TTCI, as well as the contribution of certain pillars to the subindex *T&T Human, cultural, and natural resources*. But in calculation of TTCI or its components, it is not relevant to determine the degree of component influence on the total index or subindexes. According to WEF methodology, TTCI or its subindexes are calculated as a simple average of all the components within them.



However, although the values of calculated coefficients in regression analysis in Table 8 are approximate, it can be observed that the highest influence on the TTCI has a subindex *T&T Human, cultural and natural resources*, then *T&T Business environment and infrastructure*, and the lowest - *T&T Regulatory framework*.

**Table 8** Regression analysis – The influence of subindexes of TTCI on the TTCI value for 2011

Subindexes	Unstandardized coefficients		Standardized coefficients	t	Sig.
	B	Std. Error	Beta		
(Constant)	0.028	0.024		1.150	0.294
T&T regulatory framework (score)	0.321	0.008	0.279	41.804	0.000
T&T business environment and infrastructure (score)	0.334	0.004	0.522	82.544	0.000
T&T human, cultural and natural resources (score)	0.342	0.008	0.271	42.222	0.000

Dependent Variable: TTCI 2011 (score)

**e) Analysis of the influence of pillars within the subindex T&T human, cultural, and natural resources to subindex T&T human, cultural, and natural resources**

If one analyzes the influence of pillars within the subindex - *T&T human, cultural, and natural resources* to subindex *T&T human, cultural, and natural resources* for 2011, it can be concluded that the highest contribution to this subindex has been given by the pillar - *Affinity for T&T*, then - *Cultural resources*, the next is - *Natural resources*, and the lowest contribution has the pillar - *Human resources*.

**Table 9** Regression analysis – the influence of pillars within the subindex T&T human, cultural, and natural resources on subindex T&T human, cultural, and natural resources for 2011

Pillars within subindexes	Unstandardized Coefficients		Standardized Coefficients	t	Sig.
	B	Std. Error	Beta		
(Constant)	0.040	0.045		0.899	0.410
Human resources (score)	0.243	0.010	0.141	24.275	0.000
Affinity for T&T (score)	0.251	0.003	0.568	98.517	0.000
Natural resources (score)	0.247	0.005	0.338	53.451	0.000
Cultural resources (score)	0.249	0.002	0.653	106.100	0.000

Dependent Variable: Subindex - T&T human, cultural, and natural resources (score) in 2011

In this way, with the assistance of this analysis (Table 9), it has been concluded that *human resources* represent a critical factor whose improvement can, for certain, contribute to competitiveness increase in the tourism of the researched countries. "However, the requirement for increasing number of employees in the tourism must be accompanied by improving the quality of the human resources in this sector. Request for better-qualified human resources is a key requirement for improving the competitiveness of the sector" [9, p.444].

## CONCLUSION

According to the analysis of change in rating competitiveness subindexes within TTCI in 2011 compared to 2009, it can be concluded that the fall in the competitiveness score has been noted with the subindex *T&T human, cultural, and natural resources* in Croatia, Montenegro, FYR Macedonia and Bulgaria.

Based on the separation of subindex *T&T human, cultural, and natural resources* into its pillars, and based on the rank analysis of its pillars, it has been concluded that most of the observed countries have a fall of competitiveness rank in the pillar Human resources (Slovenia, Montenegro, FYR Macedonia, Serbia, Bulgaria, and Romania).

It can be noted that, by analyzing changes in the pillar score within subindex - *T&T human, cultural, and natural resources*, all countries, except Bosnia and Herzegovina and Hungary, have a fall in score of human resources quality within the tourism sector.

Considering the fact that there is a high degree of correlation between TTCI and GCI, further analysis confirmed that all pillars within subindex - *T&T human, cultural, and natural resources*, have a positive correlation with the GCI. The weakest correlation degree with GCI has the pillar – *Human resources*.

Analysis of the degree and the direction of correlation of pillars within the subindex - *T&T human, cultural, and natural resources* with the TTCI, imposed the conclusion that all the pillars have a positive correlation with the TTCI, except the pillar – *Human resources* which is in a negative correlation with the TTCI.

A relevant fact for the analysis of competitiveness determinants within the tourism sector is to determine the contribution of a certain factors to the total TTCI. So, with the help of regression analysis, it has been concluded that the highest influence on total TTCI has the subindex - *T&T human, cultural, and natural resources*. By analyzing the influence of pillars within the subindex - *T&T human, cultural, and natural resources*, it has been concluded that the lowest contribution to this subindex provides the pillar – Human resources.

This kind of analysis implies that human resources represent a critical factor for the improvement of tourism sector competitiveness. It means that all the countries in the analyzed group should create directions within the tourism development policy framework which would provide human resources to contribute more to the competitiveness growth level of this sector.

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## **IDENTIFIKOVANJE FAKTORA KONKURENTNOSTI TURIZMA ZEMALJA JUGOISTOČNE EVROPE**

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*Cilj rada je da se identifikuju kritični faktori za povećanje konkurentnosti i razvoj turističkog sektora u okviru zemalja jugoistočne Evrope. Za svrhe ovog istraživanja, analizirani su faktori tj. komponente (takozvani stubovi i subindeksi) Indeksa konkurentnosti turizma i putovanja (TTCI) primenom odgovarajućih statističkih metoda (deskriptivna statistika, korelaciona i regresiona analiza). Budući da između Globalnog indeksa konkurentnosti (GCI) i TTCI postoji visok stepen korelacije, u radu je izvršena analiza uticaja faktora Indeksa konkurentnosti turizma i putovanja (TTCI) na GCI. U radu je ukazano na to da ljudski resursi predstavljaju značajan faktor na koji bi zemlje jugoistočne Evrope trebalo da obrate više pažnje prilikom izrade novih strategija i programa razvoja turističkog sektora u funkciji podizanja nivoa konkurentnosti i njegovog rasta.*

**Ključne reči:** turizam, Indeks konkurentnosti turizma i putovanja, analiza, ljudski resursi.