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IZVOZNI POTENCIJAL SRBIJE U EU

Rad pokazuje primenu gravitacionog panel modela u oceni izvoznog potencijala Srbije u EU tokom perioda 2001-2017. godine. Gravitacioni model je dao efikasne ocene parametara modela i na ovom modelu se pokazao kao pogodan alat za ocenjivanje trgovinskih tokova između zemalja na uzorku 29 država, i to 28 članica EU i Srbija. Regresiona jednačina panel modela sadrži niz objašnjavajućih varijabli koje opisuju tokove trgovinske razmene. Veličina ekonomije (bruto domaći proizvod), kupovna moć stanovništva (bruto domaći proizvod po glavi stanovnika), i razdaljina (mera geografske udaljenosti između glavnih gradova država trgovinskih partnera) imaju merljive efekte na izvoz Srbije u EU. Rezultati analize pokazali su da veličina i kupovna moć trgovinskih partnera pozitivno utiču na izvoz roba iz Srbije u EU. Stoga, strukturu izvoza treba prilagoditi zahtevima velikih ekonomija i ekonomija koje imaju visok životni standard kako bi u budućnosti povećali izvoz u većem obimu. Ovo istraživanje može predstavljati dobru osnovu za analizu izvoznih potencijala Srbije.

Ključne reči: srpski izvoz, Evropska unija, gravitacioni panel model

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1. Uvod

Nakon promene ekonomskog i političkog sistema 2000. godine, Srbija je brzom privatizacijom, liberalizacijom cena i kretanja kapitala, kao i reformisanjem poreskog i finansijskog sistema započela proces tranzicije. To je bio zajednički put kojim su već krenule i druge tranzicione ekonomije u centralnoj i istočnoj Evropi, put transformacije od centralno-planske ka otvorenoj tržišnoj ekonomiji. Međutim, brza liberalizacija cena, precenjena nacionalna valuta i porast domaćih zarada u evrima koji je omogućio rast domaće tražnje, doveo je da je jedan od važnijih ciljeva u tom trenutku bio podsticanje međunarodnih trgovinskih aktivnosti i rast izvoza. Domaće kompanije podsticane su da promovišu svoju saradnju sa inostranim partnerima i povećaju svoj izvoz. Preduzete reforme doprinele su rastu ukupne razmene Srbije, ali i brzom porastu uvoza i shodno tome visokom trgovinskom deficitu. Danas, Srbija traži način da se posledice ovakve politike ublaže, poveća izvoz i smanji spoljnotrgovinski deficit. U ovim naporima, okreće se svojim najzačajnijim spoljnotrgovinskim partnerima – zemljama Evropske unije.

Cilj rada je da analiziramo potencijale izvoza Srbije u EU, s obzirom na geografski položaj i raspoložive resurse Srbije, kao i da sagledamo perspektive buduće razmene, pre svega izvoza roba. U istraživanju primenjujemo gravitacioni model za analizu izvoza iz Srbije u države članice EU tokom sedamnaestogodišnjeg perioda, od 2001. do 2017. godine. Primenom gravitacionog modela analiziramo i ocenjujemo različite faktore i njihove efekte na rast izvoza iz Srbije u EU.

U osnovi ekonomskih istraživanja i analize ekonomske saradnje dve ekonomije nalaze se apsolutne i relativne prednosti svake ekonomije ponaosob i potencijal za rast međusobne razmene. Pravilo je da ekonomije ostvaruju najveći obim razmene roba i usluga sa susednim ekonomijama. Pri tome, efekti na trgovinu su veći što je susedna ekonomija razvijenija i sa većim tržištem. Međutim, prednosti takvih ekonomija ponekad postaju manje relevantne, u poređenju sa razvijenim regionalnim integracijama. Otuda, ekonomije se priključuju različitim regionalnim integracijama, kao što je i Evropska unija. Koji je razlog za preusmeravanje razmene u pravcu ekonomija koje pripadaju regionalnim integracijama, tj. EU? Odgovor je da ove zemlje imaju potencijalno veće tržište, izraženiju ekonomsku aktivnost i veću kupovnu moć stanovništva. Velike ekonomije su relativno manje otvorene, jer uspevaju da u okvirima sopstvenih granica iskoriste ekonomiju obima (npr. Nemačka). Sa druge strane, manja a razvijena ekonomija, poput Luksemburga, u velikom stepenu zavisi od trgovine s inostranstvom, kako zbog oskudnosti prirodnih resursa, tako i zbog nedovoljno velikog tržišta da u okvirima svojih granica postigne ekonomiju obima. Kod razvijenih tržišnih ekonomija rast trgovine zasnovan je na rastu BDP-a putem rasta produktivnosti, inovacija i invencija, kao i kapitalno intenzivnog procesa proizvodnje. Kupovna moć ima značajnu ulogu sa aspekta tražnje, kako za domaćim tako i za ino-

stranim proizvodima. Kupovna moć inostranih zemalja odražava se na izvoz domaće ekonomije, posebno ako postoji visoka elastičnost tražnje za domaćim proizvodima. Važi i obratno, domaća tražnja za inostranim proizvodima utiče na BDP inostranih ekonomija. Udaljenost između trgovinskih partnera ne igra značajnu ulogu u razmeni kao što je to bio slučaj u prošlosti, jer su transportni troškovi daleko niži. Brojna empirijska istraživanja pokazala su da postoji snažan pozitivan odnos između veličine ekonomije (BDP-a) i ukupne trgovine i/ili izvoza.^{1, 2, 3, 4}

Rad se sastoji iz šest celina. Nakon uvoda, dat je osvrt na novije teorije spoljne trgovine. Izvozni potencijali Srbije prikazani su u trećem delu. U četvrtom delu rada prikazani su skupovi podataka i gravitacioni model koji se koristi u analizi. Peti deo sadrži rezultate i ocene gravitacionog modela. Završni odeljak predstavlja zaključna razmatranja. Na kraju rada je prilog.

2. Teorijski i empirijski stavovi - Pregled

Izvoz je važna determinanta ekonomskog rasta, ali ne postoji univerzalna teorija koja precizno definiše koje su to determinante izvoza – inostrana tražnja, elastičnost tražnje, promena deviznog kursa, kupovna moć stanovništva, specijalizacija ili diversifikacija proizvodnje. Posmatrano sa aspekta teorije međunarodne trgovine, rast izvoza pozitivno doprinosi ekonomskom rastu, i integralni je deo procesa ekonomskog rasta. Istovremeno, transakcije sa inostranstvom doprinose rastu svetske trgovine i svetske privrede. Nove teorije trgovinske tokove objašnjavaju kroz razmenu između zemalja. Prema Krugmanu, Obstfeldu, i Melitzu⁵ tokove svetske razmene determinišu ekonomija veličine, nesavršena konkurencija i diferencirani proizvodi, uz izvoz sofisticiranih proizvoda. Danas je glavni pokazatelj trgovinskih tokova, pa i uporedne analize industrijalizovanih ekonomija, ukupna faktorska produktivnost (*total factor productivity*), koja odražava visok nivo specijalizacije proizvoda i potencijalne razlike između faktora proizvodnje kojima ekonomije raspolažu. Razvijene ekonomije trguju u većem procentu sa bogatim ekonomijama, takođe i u većem obimu ostvaru-

¹ Montanari Marco (2005): EU trade with Balkans, large room for growth?, *Eastern European Economics*, vol.43, iss.1, pp. 59-81

² Braha Kushtrim, Artan Qineti, Sadudin Ibraimi, Amir Imeri (2015): Trade and Integration: A Gravity Model of Trade for Selected EU Candidate Countries, *International Conference of Agricultural Economists*, Univerista Degli Studi Di Milano, August 8-14, Italy

³ Ilić Snežana (2012): *Is there potential for trade growth? A gravity approach in the case of Serbia*, Central European University, Department of Economics, Budapest, Hungary

⁴ Ristanović Vladimir, Barjaktarević Siniša, Cogoljević Dušan (2017): Direction of Serbian Trade: Gravity Model Based on Pool Data, *EuroEconomica* Vol 36, no. 1/2017

⁵ Krugman Paul, Obstfeld Maurice, Melitz J. Marc (2012): *International Economics: Theory & Policy*, 9th ed. Pearson

jući ekonomiju obima u proizvodnji, i uopšteno govoreći, daju veće mogućnosti za trgovinu različitim robama, s obzirom na činjenicu da imaju veći dohodak. Sa druge strane, manje razvijene ekonomije i dalje zasnivaju spoljnotrgovinsku politiku na obimu i vrednostima razmene.

Male otvorene ekonomije danas odlikuje nepovoljna struktura razmene sa neadekvatnom strukturom faktora proizvodnje (nekvalifikovanim radom, i nedovoljno kapitala), nekoliko proizvodnih sektora (obično sa zastarelom tehnologijom) i u uslovima nesavršene konkurencije. Pod takvim poslovnim okolnostima za manje otvorene ekonomije od presudnog značaja je postizanje ekonomije obima. Stoga, rast razmene kod ovih poslednjih ekonomija mora da prati i fragmentacija proizvodnje izvan granica.⁶ Митрофанов⁷ u analizi izvoza Belorusije konstatuje da je struktura izvoza manje razvijene ekonomije značajno različita od strukture izvoza razvijenih ekonomija (pa se i rezultati u gravitacionom modelu razlikuju od rezultata razvijenih ekonomija), da je proizvodnja locirana na posebnim mestima što otežava pristup inostranim tržištima, zatim da ponuda manje razvijenih ekonomija ne zavisi od kupovne moći stanovnika razvijenih zemalja, dok kod razvijenih ekonomija udaljenost značajno smanjuje trgovinu što ne mora biti slučaj kod manje razvijenih ekonomija. Chan-Hyun⁸ je na primeru korejske razmene pokazao da se trgovinski tokovi u bilateralnoj razmeni povećavaju sa veličinom BDP-a trgovinskih partnera i smanjuju sa njihovom udaljenošću. Slično, u analizama trgovinske razmene između blokova Martinez-Zaroso and Nowak-Lehmann⁹, i Martínez-Zarzoso and Horsewood¹⁰ su pokazali da je veličina zemlje direktno vezana za trgovinu i da veće zemlje imaju veći kapacitet za apsorpciju. Na primeru poljoprivrednih proizvoda Češke, Ševela¹¹ pokazuje pozitivan uticaj BDP-a i negativan uticaj BPD po glavi stanovnika i udaljenosti, na obim izvoza čeških poljoprivrednih proizvoda sa ekonomijama EU.

⁶ Baldwin Richard (2011): Trade and Industrialization after Globalization's 2nd Unbundling: How Building and Joining a Supply Chain Are Different and Why It Matters, *NBER Working Paper* 17716, Cambridge, MA

⁷ Mitrofanov Andrei Vladimirovič (2014): Belarusian export: Gravity model approach, Молодой ученый, №7. pp. 385. URL <https://moluch.ru/archive/66/11003/> (дата обращения: 03.08.2018).

⁸ Chan-Hyun, S. (2001): *A gravity Model Analysis of Korea's Trade Patterns and the effects of a Regional Trading Agreement*. The International Centre for the study of East Asian Development, Kitakyushu Working Paper Senes Vol. 2001-09.

⁹ Martinez-Zaroso Inmaculada, Nowak-Lehmann Felicitas (2003): Augmented gravity model: an application to Mercosur-European Union trade flows, *Journal of Applied Econometrics* 18: 291-316

¹⁰ Martínez-Zarzoso Inmaculada, Horsewood Nicholas (2005): *Regional trading agreements: dynamic panel data evidence from the gravity model*, JEL: F14, F15

¹¹ Ševela Marcel (2002): Gravity-type model of Czech agricultural export, *Agric.econ.*, 48, pp. 463-466

U savremenoj ekonomiji, ili kako je Subramanian i Kessler¹² svrstavaju u četvrtu eru – hiperglobalizacija, tokovi razmene su značajno povećani, toliko da svojim rastom prevazilaze rast globalnog BDP. Posledice treba tražiti u značajnom smanjivanju troškova transporta i još izraženijeg smanjivanja troškova komunikacija, neophodnih za realizaciju međunarodne razmene. Iako veće koristi od razmene imaju bogate ekonomije, ipak i manje razvijene ekonomije doprinose porastu robne razmene u svetskim okvirima. Kakve su izvozne šanse Srbije u ovakvom okruženju?

3. Izvozni trend srpske privrede

Najveći deo ukupne ekonomske razmene sa inostranstvom, Srbija ostvaruje sa partnerima sa evropskog kontinenta – čak više od 80% ukupne spoljnotrgovinske razmene. Već godinama, glavni trgovinski partneri Srbije su države članice EU (najviše Nemačka i Italija, 11,6% i 11,2%, respektivno, ukupne spoljnotrgovinske razmene, prosečno godišnje tokom posmatranog perioda), potom susedne zemlje (gde dominira Bosna i Hercegovina sa 5,4% ukupne spoljnotrgovinske razmene, prosečno godišnje tokom posmatranog perioda), i Ruska federacija (9,3% ukupne spoljnotrgovinske razmene, prosečno godišnje tokom posmatranog perioda). Ovakve rezultate Srbija ostvaruje zahvaljujući potpisnim trgovinskim sporazumima sa glavnim spoljnotrgovinskim partnerima. Tako, sa EU Srbija je potpisala Sporazum o stabilizaciji i pridruživanju (*The Stabilisation and Association Agreement – SSA, potpisan aprila 2008. godine*)¹³, a sa susednim zemljama – Crna Gora, Makedonija, Bosna i Hercegovina, Moldavija, Albanija i UNMIK Kosovo, Srbija čini zonu slobodne trgovine (*Sporazumu o slobodnoj trgovini u Centralnoj Evropi – CEFTA 2006, potpisan 19. decembra 2006. godine u Bukureštu*).¹⁴ Sa Ruskom federacijom postoji preferencijalni bilateralan trgovinski sporazum (*Sporazum o slobodnoj trgovini između SR Jugoslavije i Ruske Federacije, od 28. avgusta 2000. godine*).¹⁵

Dosadašnja saradnja i visok stepen razmene sa EU, ostavlja prostor Republici Srbiji da dodatno poveća obim izvoza na prostor EU. Tokom proteklih 17 godina potpisani su brojni ugovori sa EU, a ukupna vrednost izvoza iz Srbije je povećana, naročito poslednjih godina analiziranog perioda. Na grafikonu 1 prikazane su prosečne vrednosti izvoza iz Srbije u zemlje članice EU. Takođe, prikazane su prosečne vrednosti BDP po glavi stanovnika zemalja članica EU, za period 2001-2017. godine. Ovo je omogućilo da sagledamo da li postoji veza između kupovne moći stanovništva zemalja članica EU i tražnje za proizvodima iz Srbije, tj. izvoza iz Srbije. Na bazi podataka iz grafikona može se uočiti da je izvoz (posmatrano,

¹² Subramanian Arvind, Kessler Martin (2013): *The Hyperglobalization of Trade and Its Future*, *Global Citizen Foundation*, Working Paper 3, pp. 6

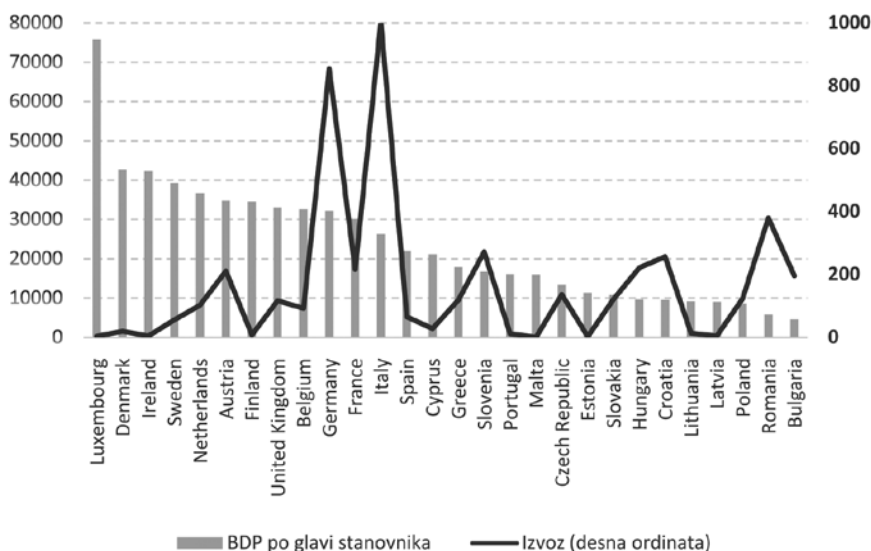
¹³ Izvor: Ministarstvo finansija Republike Srbije: www.carina.rs/lat/Informacije/Stranice/MedjunarodniSporazumi.aspx

¹⁴ Ibid.

¹⁵ Ibid.

prosečno godišnje) iz Srbije najviše realizovan u zemljama članicama EU sa nižim BDP po glavi stanovnika (posmatran, prosečno godišnje). Na žalost, Srbija najveći obim izvoza ne realizuje kod zemalja članica sa najvećim BDP po glavi stanovnika, kod kojih je kupovna moć stanovništva visoka, i gde bi postojala potencijalno veća tražnja za srpskim proizvodima. U zemlje sa najvećim BDP po glavi stanovnika Srbija realizuje veoma male količine izvoza, u Luksemburg prosečno godišnje 3,3 miliona evra, Dansku prosečno godišnje 20 miliona evra ili Irsku prosečno godišnje 4,6 miliona evra. Od zemalja sa visokim životnim standardom (prosečnim godišnjim BDP po glavi stanovnika) najveći izvoz iz Srbije završi u Italiji (26.253 evra) i Nemačkoj (32.135 evra), dok daleko veći obim završi u zemljama sa nižim životnim standardom u Rumuniji (5.571 evra), Sloveniji (16.706 evra), Hrvatskoj (9.541 evra), Mađarskoj (9.629 evra) itd. Međutim, glavni spoljnotrgovinski partneri Srbije su, odmah uz Italiju i Nemačku, Bosna i Hercegovina, Ruska federacija, Republika Crna Gora, Republika Makedonija, sve ekonomije van EU i sa nižim nivoima BDP po glavi stanovnika od EU proseka. Sve ovo pokazuje da strukturu izvoza Srbije, tj. izvozni asortiman treba promeniti i prilagoditi zahtevima razvijenih i bogatih partnera.¹⁶ Potrebno je odgovoriti na potrebe i tražnju velikih učesnika na tržištu, kod kojih i manja elastičnost tražnje može doprineti rastu izvoza.

Grafikon 1. Prosečna godišnja vrednost izvoza Srbije u zemlje članice EU i njihove prosečne godišnje vrednost GDP po glavi stanovnika, za period 2001-2017, milioni evra



Izvor: Proračuni autora prema podacima Republičkog zavoda za statistiku Republike Srbije, Trgovinske statistike za razvoj međunarodnog poslovanja.

¹⁶ Ristanović Vladimir (2015): Struktura industrijske proizvodnje u Srbiji nakon 2000-te, *Ekonomski pogledi*, vol 17(4); 159-172; ISSN 1450-7951 Online ISSN 2334-7570

Trgovinsku razmenu sa inostranstvom u najvećem obimu Srbija ostvaruje sa zemljama članicama EU. U posmatranom periodu taj procenat je prelazio 50% svake godine, a samo je u 2017. godini dostigao 66% od celokupne spoljnotrgovinske razmene. Obim trgovine sa zemljama EU kontinuirano je rastao sa blagim oscilacijama. Delom, to je rezultat trgovinske razmene sa novim članicama EU – Rumunijom, Bugarskom, i Hrvatskom (s kojima poslednjih godina Srbija ostvaruje suficit u razmeni, zbog većeg izvoza).

Srbija je velikim delom koncentrisala trgovinsku razmenu s balkanskim zemljama. Na tržištu CEFTA, Srbija ostvaruje trgovinski suficit zahvaljujući izvozu poljoprivrednih proizvoda, gvožđa i čelika. Analizirajući obim i strukturu robnog izvoza, srpski izvoz bi mogao biti veći, da trenutni nivo spoljne trgovine nije niži od njegovog potencijalnog nivoa. Kao i u drugim istočno-evropskim zemljama u tranziciji, a bivšim članicama CEFTA, sada članicama EU, otvaranjem ekonomija rastao je obim spoljne trgovine sa članicama EU iz godine u godinu. Istovremeno, zadržan je nivo razmene sa susednim trgovinskim partnerima. U slučaju Srbije situacija je nešto drugačija. Razmena sa članicama EU jeste povećana, ali sa zemljama CEFTA obim razmene se poslednjih godina smanjuje. Naime, većina zemalja članica CEFTA su bivše jugoslovenske republike i to su ekonomije sa sličnim tehničko-tehnološkim progresom i nižim tehnološki intenzivnim proizvodnim procesom. Shodno Rikardovoj teoriji, i u takvim uslovima postoje preduslovi za rast razmene. Takođe, novije teorije spoljne trgovine objašnjavaju da unutar regionalne integracije dolazi do skretanja trgovine (*trade diversion*), ali i kreiranja trgovine (*trade creation*), tako da postoje objektivne šanse da se ostvare koristi zajedničkog tržišta.

U nastavku rada analiziraćemo samo razmenu s državama članicama EU, sa kojima Srbija realizuje preko polovine ukupne spoljnotrgovinske razmene. Cilj analize je da istražimo trgovinsku razmenu (izvoz) između Srbije i zemalja EU primenom gravitacionog modela.

4. Podaci i metodologija istraživanja

U literaturi, gravitacioni model ima dugu istoriju u međunarodnoj i regionalnoj ekonomiji. Koristio se i u sociološkoj nauci (socijalni tokovi, migracije stanovništva itd.). Jedan je od najviše zastupljenijih i najviše primenjivanih alata za objašnjenje bilateralne trgovinske razmene. Brojni su istraživački radovi koji objašnjavaju efekte različitih ekonomskih determinanti (BDP, robne cene, strane direktne investicije, devizne rezerve, populaciju, devizni kurs itd.) i njihov izbor se značajno razlikuje od istraživanja do istraživanja. Kod brojnih istraživanja

dominiraju BDP, BDP per capita i udaljenost između država.^{17, 18, 19, 20, 21} Saglasno teoriji gravitacionog modela, izvoz je pozitivno korelisan sa BDP-om, pozitivno korelisan sa BDP-om po glavi stanovnika zemlje uvoznice (trgovinskog partnera), i negativno korelisan sa rastojanjem između dve zemlje.

Podaci upotrebljeni u modelu su preuzeti iz zvaničnih izvora za sve makroekonomske determinante – izvoz Srbije, BDP Srbije i država trgovinskih partnera, BDP po glavi stanovnika Srbije i država trgovinskih partnera, i razdaljinu između država. Važno je napomenuti da smo u analizi pratili broj članica EU prema stvarnom članstvu tokom posmatranog perioda 2001-2017. godina: u periodu 2001-2006. godina to je bila EU-25, u periodu 2006-2013 godina EU-27, a od 2014. godine EU-28. Definicije varijabli i izvori podataka dati su u tabeli 1. U ovoj analizi izostavljeno je stanovništvo kao uobičajeno korišćena objašnjavajuća varijabla modela, jer je kod ekonomija izvoznica, pa i uvoznica, teško *a priori* odrediti efekte stanovništva na izvoz. Kao što pokazuju radovi Oguledo and MacPhee²² i Eita and Jordaan²³, ti efekti su dvosmisleni.

¹⁷ Bergstrand H. Jeffrey (1985): The gravity equation in international trade: some microeconomic foundation and empirical evidence, *Review of Economic and Statistics*, 67, pp. 474-481.

¹⁸ Bergstrand H. Jeffrey (1989): The Generalized Gravity Equation, Monopolistic Competition, and the Factor Proportion Theory in International Trade, *Review of Economic and Statistics*, 71, pp. 143-153.

¹⁹ Porojan Anca (2000): Trade flows and spatial effects: the gravity model revised, *Review of University College London*, 4, pp. 168-173.

²⁰ Chan-Hyun, S. (2001): *A gravity Model Analysis of Korea's Trade Patterns and the effects of a Regional Trading Agreement*. The International Centre for the study of East Asian Development, Kitakyushu Working Paper Series Vol. 2001-09.

²¹ Švela Marcel (2002): Gravity-type model of Czech agricultural export, *Agric.econ.*, 48, pp. 463-466

²² Oguledo I. Victor, Macphee R Craig (1994): Gravity Models: A Reformulation and an Application to Discriminatory Trade Arrangements, *Applied Economics*. Vol. 26, pp. 107-120.

²³ Eita Joel Hinaunye, Jordaan C. Andre (2007): South Africa's Wood Export Potential Using a Gravity Model Approach University of Pretoria. *Department of Economics Working Paper Series*: 2007-23.

Tabela 1. Definisanje varijabli

Varijabla	Definicija	Izvori podataka
exp	Izvoz u tekućim dolarima	Republički zavod za statistiku, Evrostat (<i>Eurostat</i>) i Statistika trgovine za razvoj međunarodnog poslovanja (<i>Trade statistics for international business development</i>)
GDP	Bruto domaći proizvod domaće ekonomije u tekućim dolarima	Republički zavod za statistiku, Evrostat (<i>Eurostat</i>) i Statistika trgovine za razvoj međunarodnog poslovanja (<i>Trade statistics for international business development</i>)
GDP*	Bruto domaći proizvod strane ekonomije u tekućim dolarima	Republički zavod za statistiku, Evrostat (<i>Eurostat</i>) i Statistika trgovine za razvoj međunarodnog poslovanja (<i>Trade statistics for international business development</i>)
GDP per capita	Bruto domaći proizvod po glavi stanovnika domaće ekonomije u tekućim dolarima	Republički zavod za statistiku, Evrostat (<i>Eurostat</i>) i Statistika trgovine za razvoj međunarodnog poslovanja (<i>Trade statistics for international business development</i>)
GDP* per capita	Bruto domaći proizvod po glavi stanovnika strane ekonomije u tekućim dolarima	Republički zavod za statistiku, Evrostat (<i>Eurostat</i>) i Statistika trgovine za razvoj međunarodnog poslovanja (<i>Trade statistics for international business development</i>)
distance	Rastojanje u kilometrima (predstavlja razdaljinu između glavnih gradova)	Centar za prospektivne studije i međunarodne informacije (CEPII – <i>le Centre d'études prospectives et d'informations internationales</i>)
border	Veštačka promenljiva koja uzima vrednost 1 ako zemlje <i>i</i> i <i>j</i> imaju zajedničku granicu, inače je 0	
language	Veštačka promenljiva koja uzima vrednost 1 ako zemlje <i>i</i> i <i>j</i> imaju zajednički jezik, inače je 0	

Veličina ili ekonomska snaga privrede obično je predstavljena agregatnom veličinom (BDP, BNP). Bogatije ekonomije imaju tendenciju da trguju više, tako da važi pravilo da što je veća ekonomija to je veći obim razmene sa drugim ekonomijama. Ove ekonomije imaju razvijenu proizvodnju i veći izvozni asortiman, pa mogu ponuditi najsofisticiranije proizvode na svetskom tržištu, za kojima danas postoji visoka elastičnost. Uz to, ove ekonomije uspevaju da ostvare ekonomiju obima u okviru svojih granica. Bruto domaći proizvod po glavi stanovnika smo koristili za ocenu kupovne moći stanovništva – što je BDP po glavi

stanovnika veći, veća je tražnja za inostranim proizvodima, tj. za uvozom (npr. SAD). U modelu, geografsku udaljenost koristili smo kao zamenu za troškove transporta u međunarodnoj trgovini, zatim za izvozno/uvozne tarife, damping cene i druge trgovinske barijere. Model smo proširili sa dve veštačke varijable, zajedničku granicu i zajednički jezik, jer preko individualnih karakteristika zemalja koje odražavaju želimo da sagledamo uzajamne trgovinske veze susednih ekonomija.

Da bi ocenili izvozne tokove između Srbije i zemalja članica EU upotrebili smo gravitacioni model, u okviru koga uticaj specifičnih faktora na izvoz ispituje regresionim jednačinama uz pomoć panel serija. Podaci panel serija su pogodni za ovakav vid ocenjivanja regresionih jednačina pošto omogućavaju da se istovremeno analiziraju uporedni podaci (N) i podaci vremenskih serija (T). Zahvaljujući karakteristikama panel serija povećava se veličina uzorka (NT) i raste broj informacija iz ograničenog broja opservacija (uzorka). Time raste efikasnost ocena modela i dobijamo bolje rezultate razmene. Istovremeno, model odlikuje veći stepen varijabilnosti i veći broj stepeni slobode, i manja korelisanost objašnjavajućih varijabli. Još jedna prednost upotrebe gravitacionog panel modela je u tome što nam omogućava istovremenu analizu i strukture izvoza i promena u izvozu tokom vremena. Ocenjeni rezultati modela treba da pokažu kakav je odnos između veličine ekonomije, kupovne moći stanovnika i udaljenosti, na jednoj strani i izvoznog potencijala, na drugoj strani.

Ova složena analiza ima za cilj da, upotrebom gravitacionog modela, oceni uticaj BDP-a i BDP per capita, tj. kupovne moći stanovništva na izvoz iz Srbije, ali i da oceni uticaj udaljenosti (razdaljine između država) na obim izvoza srpskih proizvoda – da li veća udaljenost predstavlja ograničenje za trgovinu, ili ne? U analizi, u model su uključene veštačke varijable. Testiran je i ocenjen potencijalni uticaj na izvoz onih ekonomija koje imaju zajedničku granicu i srodan, među sobom razumljiv jezik. Za ocenu varijabli koristimo model slučajnog efekta (RE) i model fiksnog efekta (FE). U RE modelu regresioni parametri uz objašnjavajuće varijable su nepromenljivi, dok su varijacije po jedinicama posmatranja i kroz vreme obuhvaćene slučajnom greškom (slučajna varijabla modela). Model FE zasniva na standardnim pretpostavkama da slučajna greška u_{ijt} ima normalnu raspodelu (nulta srednja vrednost i konstantna varijansa), a da su objašnjavajuće promenljive nestohastičke i nezavisne od greške. Uobičajeno je da se standardni gravitacioni model ocenjuje modelom FE, međutim može da poseduje krupan nedostatak – da ne dopušta ocenu izvoznih promenljivih iz modela. Iz ugla ekonometrijske analize, rezultati Hausmanovog testa ukazaće nam koje efekte modela (RE ili FE) da koristimo prilikom testiranja i ocene koeficijenata uz varijable modela. Prema deskriptivnoj statistici u modelu imamo ukupno 476 panela opservacija [N = 28; T = 17]. Za regresione ocene koristili smo statistički softver Stata S/E, verzija 13.0.

4.1. Gravitacioni model

Gravitacioni model dobio je ime po Njutnovom zakonu gravitacije. Prema dobro poznatom zakonu, sila između dva tela je pozitivno korelisana sa njihovim masama (veličinama) i negativno korelisana sa njihovom razdaljinom. Uopšteno govoreći, snaga međusobne veze između dva tela zavisi od njihove veličine i karakteristika, tako da što su tela veća i bliža to su više međusobno povezana. Kada zakon prenesemo na odnose u ekonomskoj nauci mogli bismo reći da je razmena između ekonomija (pozitivno) korelisana sa veličinom ekonomije i (negativno) korelisana sa udaljenošću između tih ekonomija. Otuda, ne iznenađuje što je primena gravitacionog modela veoma rasprostranjena niz decenija u prošlosti, te se koristi za ekonomska istraživanja i prognoze.

Primena gravitacionog modela je rasprostranjena iz razloga što je u pitanju model koji objašnjava strukturu razmene i ekonomske razloge za međunarodnu trgovinu. Primenu je našao u analizama široke lepeze proizvoda i faktora proizvodnje još pre II svetskog rata.²⁴ Tinbergen i Lineman bili su među prvima koji su primenili ovaj model početkom 1960-ih godina, ali da su Anderson i Bergstrand prvi koji su unapredili model.²⁵ Široku primenu gravitacionog modela, pored ovih, pokazali su i brojni drugi autori dodavanjem različitih trgovinskih ograničenja kako bi se pravilno ocenio model i struktura razmene.²⁶ Najveća primena gravitacionog modela nastaje sa prihvatanjem tržišnih uslova privređivanja u državama centralne i istočne Evrope, početkom 1990-ih godina, u želji da se analiziraju potencijali trgovine između zapadnoevropskih država i novih tržišnih privreda.²⁷ Helpman²⁸ pokazuje da gravitacioni model daje dobre rezultate zemljama koje imaju veliki obim intraindustrijske trgovine u međusobnoj razmeni.

Poučeni ranijim istraživanjima opredelili smo se za gravitacioni model kojim ocenjujemo parametre na osnovu njihovih uporednih podataka i vremenskih serija. Ovakav model u osnovi daje precizniju ocenu parametara regresionog modela. Kod ranijih istraživanja gravitacionih modela, koji su ocenjivali međunarodnu razmenu između država, kao zavisna varijabla obično je korišćena ukupna trgovina ili izvoz (uvoz). Set nezavisnih varijabli je bio veoma širok i to, BDP,

²⁴ Martinez-Zaroso Inmaculada, Nowak-Lehmann Felicitas (2003): Augmented gravity model: an application to Mercosur-European Union trade flows, *Journal of Applied Econometrics* 18: pp. 294

²⁵ Ilić Snežana (2012): *Is there potential for trade growth? A gravity approach in the case of Serbia*, Central European University, Department of Economics, Budapest, Hungary

²⁶ Martínez-Zarzoso Inmaculada, Horsewood Nicholas (2005): *Regional trading agreements: dynamic panel data evidence from the gravity model*, JEL: F14, F1

²⁷ Ševela Marcel (2002): Gravity-type model of Czech agricultural export, *Agric.econ.*, 48, pp. 463-466

²⁸ Helpman Elhanan (1998): The Structure of Foreign Trade, *NBER Working Papers* No. 6752

BDP po glavi stanovnika, populacija, zajednički jezik, zajednička granica, carinske tarife, područje, devizni kurs, kultura i geografska udaljenost.^{29, 30, 31, 32}

Analizu zasnivamo na najjednostavnijem obliku gravitacionog modela koji se koristi u ekonomiji, a prema kome opisujemo bilateralnu razmenu između dve ekonomije. Započinjemo modeliranje izvoznih tokova kroz logaritamsko-linearnu formu u sledećoj jednakosti:

$$X_{ijt} = \beta X_{u_{ij}} \quad (1)$$

, gde X_{ijt} pokazuje ukupan izvoz ekonomije i u ekonomiju j u godini t ; β vektorski parametar; X je matrica logaritama objašnjavajućih promenljivih (nezavisnih varijabli) modela; u_{ij} je normalna greška modela.

Radi pojednostavljenja statističke i ekonometrijske analize, uključićemo set nezavisnih promenljivih. U nastavku dalje razvijamo model, kroz nekoliko etapa. Sledeća jednačina gravitacionog panel modela sadrži jednu zavisnu varijablu, izvoz, i tri nezavisne varijable: BDP, BDP per capita i rastojanje, i prikazana je u jednačini 2:

$$X_{ijt} = \beta_0 Y_{it}^{\beta_1} Y_{jt}^{\beta_2} BDP_{pci}^{\beta_3} BDP_{pcj}^{\beta_4} DIST_{ij}^{\beta_5} F_{ij}^{\beta_6} u_{ij} \quad (2)$$

, gde uopšteno govoreći X_{ijt} pokazuje ukupan izvoz ekonomije i u ekonomiju j u godini t ; Y_i (Y_j) odražava BDP ekonomije i i ekonomija j u godini t ; BDP_{pci} (BDP_{pcj}) je kupovna moć ekonomije i i ekonomija j u godini t ; $DIST_{ij}$ je mera udaljenosti između glavnih gradova ovih država; F_{ij} predstavlja bilo koje druge faktore (varijable) unutar modela; u_{ij} je slučajna greška modela (sastoji se od pojedinačnih i vremenskih efekata, kao i greške).

Daljim proširivanjem forme modela, jednačina 3 pokazuje linearni odnos između više objašnjavajućih varijabli. Ova jednačina sadrži varijable čije vrednosti variraju po ekonomijama i vremenu, kao i varijable čije vrednosti variraju po zemljama, ali su konstantne u vremenu.

$$X_{ijt} = \beta_0 + \beta_1 Y_{it} + \beta_2 Y_{jt} + \beta_3 BDP_{pci} + \beta_4 BDP_{pcj} + \beta_5 DIST_{ij} + \varepsilon_{it} \quad (3)$$

, gde:

X_{ijt} izražava ukupan izvoz iz Srbije u ekonomije EU u periodu t .

Y_{it} odražava BDP Srbije, u periodu t .

Y_{jt} odražava BDP zemalja EU, u periodu t .

²⁹ Porojan Anca (2000): Trade flows and spatial effects: the gravity model revised, *Review of University College London*, 4, pp. 168-173.

³⁰ Feenstra C. Robert, Markusen A. James, Rose K. Andrew (1998): Understanding the Home Market Effect and the Gravity Equation: The Role of Differentiating Goods, *NBER Working Paper No. 6804*

³¹ Markusen R James, Venables J. Anthony (1996): The Theory of Endowment, Intra-Industry, and Multinational Trade, *NBER Working Paper No. 5529*

³² Mátyás László (2000): The Gravity Model: Some Econometrics Consideration, *World Economy*, 21: 397-401.

POP_{it} odražava BDP po glavi stanovnika Srbije, u periodu t .

POP_{jt} odražava BDP po glavi stanovnika zemalja EU u periodu t .

$DIST_{ij}$ je udaljenost između Srbije i zemalja EU.

U nastavku dodatno proširujemo model, uvođenjem dve veštačke varijable:

$$X_{ijt} = \beta_0 + \beta_1 Y_{it} + \beta_2 Y_{jt} + \beta_3 BDP_{pc_{it}} + \beta_4 BDP_{pc_{jt}} + \beta_5 DIST_{ij} + \beta_6 bord_{ij} + \beta_5 lang_{ij} + \varepsilon_{it} \quad (4)$$

, gde su:

$bord_{ij}$ odražava zajedničku granicu između Srbije i zemalja EU,

$lang_{ij}$ odražava zajednički jezik između Srbije i zemalja EU.

Pre ocene parametara razmotrimo teorijska očekivanja znakova (+/-) ocenjenih koeficijenata varijabli. Rast bogatstva u jednoj ekonomiji ukazuje na porast nivoa proizvodnje (autputa), menja se kupovna moć stanovništva pa se povećava i razmena između ekonomija. To nas navodi na zaključak da bi koeficijenti ispred varijabli BDP-a Srbije i zemalja EU, β_1 i β_2 , trebali biti s pozitivnim predznakom, i to sa većim uticajem BDP-a zemalja EU. Koeficijenti ispred varijabli BDP po glavi stanovnika (β_3 i β_4), a koji odražavaju kupovnu moć stanovništva Srbije i zemalja EU, trebali bi odražavati potpuno različit uticaj. Sa povećanjem kupovne moći stanovništva partnerskih zemalja EU potencijalno raste njihov uvoz, tj. tražnja za inostranim (srpskim) izvozom. Suprotno je sa rastom domaće kupovne moći, kada raste tražnja za inostranim proizvodima, te je uticaj na domaći izvoz ili negativan ili nije značajan. Negativan predznak se očekuje kod koeficijenta razdaljine (β_5), s obzirom na to da veća udaljenost između dve ekonomije povećava trošak razmene, i obratno manja udaljenost između ekonomija smanjuje troškove razmene. Pozitivni predznak se očekuje kod obe veštačke varijable modela (Dij), jer po pravilu, trgovinska razmena se ostvaruje u većem obimu ako partnerske zemlje dele zajedničku granicu ($bord_{ij}$) i/ili govore istim jezikom ($lang_{ij}$). U prilogu, u tabeli P1 je prikazana deskriptivna statistika za sve varijable koje su obuhvaćene modelom.

U postupku ocenjivanja regresionih parametara modela, prvo se ispituje postojanje individualnih efekata. Ako se pokaže da individualnih efekata nema, preporuka je da se koristi panel model za ocenjivanje regresije. Sa druge strane, ako postoje individualni efekti unutar modela, tada se upotrebljava ili model fiksnih efekata ili model slučajnih efekata, u zavisnosti od stepena korelacije individualnih efekata i varijabli modela. Prema Gujarati³³ i Dragutinović-Mitrović³⁴, izbor modela fiksnih efekata je merodavan u slučaju da postoji korelacija između individualnih efekata i objašnjavajućih varijabli. Po pravilu, tada se izo-

³³ Gujarati N. Damodar (2007): Basic Econometrics (4th ed.), New York, NY: The McGraw-Hill

³⁴ Dragutinović-Mitrović Radmila (2005): Limitation of the Gravity Model in Econometric Analysis of the Foreign Exchange, *Economic Annals* no. 167, October-December 2005, pp. 77-106.

stavljaju varijable koje se ne menjaju kroz vreme (udaljenost, zajednička granica ili zajednički jezik). Nasuprot modela fiksnih efekata, model slučajnih efekata se koristi kada ne postoji korelacija između individualnih efekata i objašnjavajućih varijabli. Tada su individualni efekti slučajni, pa preko reziduala svakog efekta dobijamo nove objašnjavajuće varijable (pol, granica, rastojanje, itd.). Kod ovih poslednjih, model slučajnih efekata daje efikasnije ocene. Koji model od dva napred predstavljena (model slučajnih efekata i model fiksnih efekata) ćemo iskoristiti za ocenjivanje parametara ne određujemo na osnovu odabranih varijabli modela, već vršimo testiranje Hausmanovim testom koji model daje efikasnije ocene.

U nastavku rada interpretiraćemo ocene bilateralne trgovine 29 država (Srbije i 28 trgovinskih partnera iz EU) u periodu 2001-2017. godine. Započnemo ocenom gravitacionog modela koristeći metodu običnog najmanjeg kvadrata (OLS) za izračunavanje jednačine razmene, i to prvo modela fiksnih efekata, a potom i slučajnih efekata.

5. Rezultati

Tabela 2 sadrži regresione ocene gravitacionog modela, prema jednačini 4 prikazanog modela, i to modela najmanjih kvadrata (OLS model), modela fiksnih i slučajnih efekata. Ocene modela najmanjih kvadrata (OLS model) su efikasne, ali pristrasne (zapoštljavaju pojedinačne heterogenosti unutar modela). Kod modela fiksnih efekata, po pravilu, varijable koje se ne menjaju tokom vremena (udaljenost, granica, zajednički jezik) ne mogu se proceniti koeficijenti koji stoje uz njih. Heterogenost objašnjavajućih varijabli ocenjuje model slučajnih efekata, tako da se istovremeno procenjuju parametri svih varijabli modela (bez obzira da li se (ne)menjaju protokom vremena).

Započnemo analizom F-testa, tako što testiramo prirodu individualnih efekata (fiksnih i slučajnih). Prema dobijenoj vrednosti statistike F-testa prihvatamo nultu hipotezu (H_0 : svi koeficijenti u modelu su različiti od nule). Iz ovoga zaključujemo da je postavljeni model tačan. Statistika pokazuje da postoji visok stepen objašnjenosti zavisne varijable (Y) sa nezavisnim varijablama modela (koeficijent determinacije R^2 i prilagođeni koeficijent determinacije $adj-R^2$ imaju visoke vrednosti). Rezultati sugerišu da je model slučajnih efekata bolji izbor ocena nego OLS model. Breusch i Pagan Lagrangian test multiplikacije za model slučajnih efekata daje vrednosti koje su značajne (odbacujemo hipotezu da ne postoje individualni efekti), što ukazuje da model ima manju efikasnost ($Chi-kvadrat = 212,95$; $Prob = 0,0000$). Stoga, potvrđujemo naš izbor – panel regresioni model slučajnih efekata. U nastavku sprovodimo nekoliko dijagnostičkih testova kako bi ublažili pretpostavke modela slučajnih efekata (pogledati Prilog). Testiramo, potom, heteroskedastičnost modela fiksnih efekata u okviru

koga su izostavljene varijable razdaljine, granice i jezika, zbog postojanja kolinearnosti. Dobijene vrednosti Hausmanovog testa pokazuju da ne postoje značajne razlike u ocenama koeficijanata uz varijable (H_0 : razlike u koeficijentima nisu značajne), što navodi na zaključak da je primena modela fiksnih efekata najbolja.

Tabela 2. Ocenjeni rezultati

Zavisna varijabla: X

varijable	Model OLS	Model slučajnih efekata	Model fiksnih efekata
gdp	0.1145126	0.1130819	0.1468888
gdp*	1.05846***	1.049673 ***	2.581891***
gdppc	1.859881***	1.491578***	1.075774*
gdppc*	-.610672***	-.0318221	-1.077741
dis	-1.853931***	-2.027435***	0
bord	-.2704474*	0.233858	0
lang	1.611225***	1.501999*	0
_cons	-6.127011***	-7.488159***	-26.72242*
obs	476	476	476
R ²	84.04	81.96	41.52

Napomena: ***, **, * su statistički značajne na nivoima od 1%; 5%; 10%.

Tabela 2 pokazuje da ocenjeni koeficijenti varijabli modela imaju očekivane predznake, u skladu sa teorijom. Kao što smo napred naveli, koeficijent ispred varijable BDP Srbije (*gdp*) pokazuje nizak uticaj na izvoz iz Srbije, što je bilo za očekivati, i ocena u sva tri modela nije statistički značajna. Istovremeno, to pokazuje da se malo radi na izmeni i povećanju izvoznog asortimana iz Srbije. Drugim rečima, dominira uticaj (elastičnost) tražnje stranih zemalja nad kapacitetima domaće proizvodnje. Uticaj veličine zemlje trgovinskog partnera iz EU (*gdp**) na srpski izvoz je veoma veliki i odražava navedena očekivanja. Bogate ekonomije više troše u razmeni (roba, usluga, intermedijarnih dobara), pa je i uticaj veoma izražen. Pri tome, ocene u sva tri modela su statistički značajne (nivo značajnosti od 1%). Iz tabele 2 se jasno može uočiti da BDP zemalja EU (*gdp**), zemalja uvoznica ima snažne efekte na izvoz iz Srbije. Tako bi povećanje BDP-a zemalja EU od 1% uticalo na rast izvoza iz Srbije za 2,58%, prema modelu fiksnih efekata. Dakle, usmeravanjem izvoza ka razvijenim i bogatim ekonomijama mogao bi se očekivati značajan rast izvoza, a time i rast privrede (BDP).

Statistički podaci pokazuju da je uticaj inostranog BDP-a (*gdp**) bio delom smanjen zbog manje elastičnosti tražnje za asortimanom proizvoda zemalja sa Balkana, uključujući i Srbiju tokom posmatranog perioda. To potvrđuje i nizak

uticaj kupovne moći zemalja EU na srpski izvoz ($gdppc^*$). Predznak koeficijenta nije u skladu sa očekivanjima, a ocena nije statistički značajna (osim u modelu najmanjih kvadrata). Ovakav rezultat posledica je daleko većeg obima razmene sa ekonomijama koje nisu u EU, npr. zemlje CEFTA³⁵, Rusija, Kina. Ipak, taj trend je promenjen poslednjih godina, pa je rast inostrane tražnje intenzivnije uticao na rast izvoza i smanjenje trgovinskog deficita Srbije.

Ocene modela najmanjih kvadrata i modela slučajnih efekata pokazuju da predznak koeficijent geografske udaljenosti (*dis*) odgovara očekivanjima, i statistički je značajan na nivou i od 1%. Zajednička granica (*bord*) ne ispoljava značajan uticaj na razmenu za razliku od zajedničkog jezika (*lang*), gde je uticaj veći i statistički značajniji. Niska vrednost koeficijenta granica pokazuje da zajednička granica nije nužno uslov za veći obim trgovinske razmene. Razlog za takve rezultate nalazimo u činjenici da su transportni troškovi značajno smanjeni i da je komunikacija unapređena. To potvrđuje primer Srbije, koja ostvaruje veći obim razmene sa zemljama EU koje su udaljenije (Nemačkom, Italijom i drugim) nego sa svojim neposrednim susedima članicama EU (Rumunijom, Bugarskom, Mađarskom i Hrvatskom). Varijabla zajednički jezik ima koeficijent sa očekivanim predznakom i statistički je značajna. Tu postoji suprotan zaključak u odnosu na Ristanovića i ostale.³⁶ Razlog nepodudaranja nalazimo u činjenici da je u ovom modelu upotrebljen širi koncept varijable zajednički jezik. Naime, pošli smo od pretpostavke da se pogranični stanovnici/preduzetnici pojedinih država mogu jednostavnije sporazumevati jer imaju srodne jezike (Srbija, Hrvatska, Slovenija, pa delom i Mađarska i Rumunija; Slovačka i Češka Republika; Francuska-Belgija-Nemačka). Prema toj pretpostavci veći broj stanovnika država može da se razume između sebe prilikom razmene roba i usluga. Takođe, engleski jezik je poslovni jezik, i zvanični jezik komunikacije unutar EU. Otuda je varijabla zajednički jezik statistički značajna i ostvaruje pozitivan efekat na razmenu u modelu.

Rezultati ove analize i primena gravitacionog modela, na primeru izvoza iz Srbije, potvrdili su brojna druga istraživanja koji ocenjuju bilateralnu trgo-

³⁵ Videti Chan-Hyun, S. (2001): *A gravity Model Analysis of Korea's Trade Patterns and the effects of a Regional Trading Agreement*. The International Centre for the study of East Asian Development, Kitakyushu Working Paper Senes Vol. 2001-09.

³⁶ Ristanović Vladimir, Barjaktarević Siniša, Cogoljević Dušan (2017): Direction of Serbian Trade: Gravity Model Based on Pool Data, *EuroEconomica* Vol 36, no. 1/2017

nu.^{37, 38, 39, 40} Empirijski rezultati jasno pokazuju da na ukupnu spoljnotrgovinsku razmenu utiču veličina ekonomije (BDP), kupovna moć stanovnika (BDP per capita) i geografska udaljenost, ali ne i zajednička granica u slučaju Srbije. Nakon procene modela fiksnih efekata, potencijalni uzorak potencijala je rešen, a koji se onda upoređuje sa stvarnim izvozom kako bi se utvrdilo da li Srbija i dalje ima nerealizovani izvozni potencijal.

6. Zaključak

Primenom dinamičkog ekonometrijskog modela ocenili smo faktore koji su pokazali uticaj na izvoz Srbije na tržište EU. Gravitacioni panel model se pokazao kao pogodan pristup ispitivanju multilateralnih trgovinskih tokova. Koristili smo podatke 28 ekonomija EU i Srbije u periodu 2001-2017. godina. Rezultati su pokazali da veličina ekonomije (BDP) i kupovna moć stanovništva (BDP per capita) igraju važnu ulogu u izvozu roba iz Srbije, dok geografska razdaljina pokazuje negativne efekte na bilateralnu trgovinu između Srbije i spoljnotrgovinskih partnera iz EU. Uz to, zajednička granica i jezik takođe pokazuju pozitivne efekte na bilateralnu trgovinu. Na bazi navedenog, očigledno je da razdaljina ne predstavlja nikakvu prepreku u razmeni Srbije sa tržišnim ekonomijama EU, dok iskustva u razmeni sa susednim ekonomijama Srbija treba da iskoristi za pripremu za konkurentsku utakmicu unutar EU. Dobijeni rezultati pokazuju jasno opredeljenje srpske ekonomije da najveći obim spoljnotrgovinske razmene upravo realizuje sa članicama EU. Takođe, rezultati pokazuju da razmena evropskih susednih zemalja, sa zajedničkom granicom i jezikom, utiče na porast obima razmene i da može predstavljati dobru osnovu za povećanje razmene Srbije sa susednim ekonomijama (članicama EU, ali i zemljama CEFTA).

Rezultati modela mogli bi biti bolji ako bi kreatori ekonomske politike u Srbiji proširili izvozne kapacitete u razmeni sa ekonomijama EU. Preduslov za proširenje spoljnotrgovinske razmene, ujedno i trgovinskih kapaciteta, nalazi se u promeni strukture izvoza. Nedostaje *adekvatna* strategija izvoza, jer postojeća strategija ne obuhvata oblike razmene koji su relevantni za razmenu unutar EU. U EU dominira intraindustrijska trgovina i potrebno je dostići nivo proizvoda koji su predmet ovog oblika razmene. Značajan deo takve strategije trgovine

³⁷ Montanari Marco (2005): EU trade with Balkans, large room for growth? *Eastern European Economics*, vol.43, iss.1, pp. 59-81

³⁸ Braha Kushtrim, Artan Qineti, Sadudin Ibraimi, Amir Imeri (2015): Trade and Integration: A Gravity Model of Trade for Selected EU Candidate Countries, *International Conference of Agricultural Economists*, Univerista Degli Studi Di Milano, August 8-14, Italy

³⁹ Ilić Snežana (2012): *Is there potential for trade growth? A gravity approach in the case of Serbia*, Central European University, Department of Economics, Budapest, Hungary

⁴⁰ Ristanović Vladimir, Barjaktarević Siniša, Cogoljević Dušan (2017): Direction of Serbian Trade: Gravity Model Based on Pool Data, *EuroEconomica* Vol 36, no. 1/2017

treba da se odnosi i na ukupne investicije (domaće i strane) i uvoz koji je potreban kao input za novi izvoz. Odnos između tehnološki intenzivnih proizvoda i bržeg ekonomskog rasta ili održivog rasta, pokazuje da usmeravanje raspoloživih resursa od manje tehnološki intenzivnih ka više tehnološki intenzivnim proizvodnim aktivnostima (transformacija od radno intenzivnih roba do kapitalno intenzivnih dobara) dovodi do održivog ekonomskog rasta već u srednjem roku. Dakle, potreban je novi koncept spoljnotrgovinske razmene koji će podrazumevati strukturalne karakteristike proizvodnje, specijalizaciju proizvodnje i diversifikaciju izvoza. Takav koncept je preduslov bržeg ekonomskog rasta i pruža više pogodnosti za manje razvijene ekonomije i pomaže u poboljšanju ekonomskih performansi.⁴¹

Dobijeni rezultati modela su, možemo reći, očekivani. Rezultati ovog rada pokazuju da je potrebno proširi svoje tržište izvan veličine regionalnog tržišta i da je potrebno prilikom kreiranja trgovinskih politika uzeti u obzir specifičnosti partnerskih zemalja.

⁴¹ Krugman Paul, Obstfeld Maurice, Melitz J. Marc (2012): *International Economics: Theory & Policy*, 9th ed. Pearson, pp.17

PRILOG

Tabela P1. Deskriptivna analiza izvoza Srbije u EU, 2001-2017

Panel A: Deskriptivna statistika

stats	Export	GDP	GDP*	GDP pc	GDP pc*	distance	border	language
mean	165.6056	27960.73	454973.8	3876.471	23627.73	1534.393	.1428571	.0714286
max	1981.912	36795.4	3263350	5200	91500	3283	1	1
min	.2578103	12820.9	4541.1	2100	2000	389	0	0
sd	293.7577	7146.361	703072.3	998.4161	16070.59	825.5035	.3502953	.2578103
N	476	476	476	476	476	476	476	476

Panel B: Korelacija

	exp	gdp	gdp*	gdppc	gdppc*	dis	bord	lang
exp	1.0000							
gdp	0.3137* 0.0000	1.0000						
gdp*	0.5708* 0.0000	0.1216* 0.0079	1.0000					
gdppc	0.3171* 0.0000	0.9884* 0.0000	0.1238* 0.0079	1.0000				
gdppc*	-0.0109* 0.8121	0.2508 0.0000	0.4992* 0.0000	0.2538 0.0000	1.0000			
dis	-0.4748* 0.0000	0.0000 1.0000	0.2534* 0.0000	-0.0000 1.0000	0.5020 0.0000	1.0000		
bord	0.3506* 0.0000	-0.0000 1.0000	-0.2183* 0.0000	-0.0000 1.0000	-0.5628 0.0000	-0.6584* 0.0000	1.0000	
lang	0.2229 0.0000	-0.0000 1.0000	-0.2326* 0.0000	-0.0000 1.0000	-0.1494* 0.0011	-0.3678* 0.0000	0.2831* 0.0000	1.0000

Tabela P2. Breusch-Pagan/Cook-Weisberg test heteroskedastičnosti

Breusch-Pagan / Cook-Weisberg test for heteroscedasticity
Ho: Constant variance
Variables: fitted values of exp
chi2(1) = 212.95
Prob > chi2 = 0.0000

Tabela P3. *Faktor nezavisnih promenljivih*

Variable	VIF	1/VIF
gdppc	43.31	0.023087
gdp	43.20	0.023146
gdppc*	2.15	0.465076
bord	2.10	0.476796
dis	1.99	0.501967
gdp*	1.41	0.710942
lang	1.22	0.820931
Mean VIF	13.63	

Napomena: za $vif > 10$ ili $1/vif < 0.10$ nastaju problemi.

Tabela P4. *Hausmanov test*

	Coefficients		(b-B) Difference	sqrt(diag(V_b-V_B)) S.E.
	(b) fixed	(B) random		
gdp	.1468888	.1130819	.0338069	.
gdp*	2.581891	1.049673	1.532218	.7630479
gdppc	1.075774	1.491578	-.4158038	.098711
gdppc*	-1.077741	-.0318221	-1.045919	.670695
b = consistent under Ho and Ha; obtained from xtreg				
B = inconsistent under Ha, efficient under Ho; obtained from xtreg				

Test: Ho: difference in coefficients not systematic

$$\chi^2(4) = (b-B)'[(V_b-V_B)^{-1}](b-B) = 13.27$$

$$\text{Prob} > \chi^2 = 0.0100$$

(V_b-V_B is not positive definite)

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EXPORT POTENTIAL OF SERBIA IN THE EU

The paper shows the application of the gravity panel model in the assessment of Serbia's export potential to the EU during the period 2001-2017. The Gravity Model gave effective estimates of model parameters and proved to be a suitable tool for assessing trade flows between countries on a sample of 29 countries, 28 EU members plus Serbia. The regression equation of the panel model contains a series of explanatory variables that describe the trade flows. The size of the economy (gross domestic product), the purchasing power of the population (gross domestic product per capita), and distances (measures of geographical distance between the capital cities of the states of trading partners) have measurable effects on Serbia's exports to the EU. The results of the analysis showed that the size and purchasing power of trading partners positively influence the export of goods from Serbia to the EU. Therefore, the structure of exports needs to be adapted to the demands of large economies and economies that have a high standard of living in order to increase exports in the future, on a larger scale. This research is a good basis for analyzing Serbia's export potentials.

Keywords: *Serbian exports, European Union, gravity panel model*

BLAGOSTANJE I PERSPEKTIVE STANOVNIKA SRBIJE

Predmet ovog rada je ocena srpske ekonomije kroz prizmu životnog standarda, i uopšte kvaliteta života stanovništva, što smatramo najznačajnijim kriterijumom blagostanja. Istraživanje je vršeno komparacijom srpske ekonomije sa ekonomijama sa kojima to ima najviše smisla, a to su zemlje iz neposrednog okruženja, sa ciljem da se dobije najrealnija slika. Takođe, sve ove države su podeljene u dve grupe: članice Evropske Unije (EU) i ostale, pa je kompariran kvalitet života stanovništva, da bi utvrdili razlike među njima. Primenom statističkih metoda: Studentovog t-testa i jednofaktorske analize varijanse (ANOVA), utvrđeno je da po pitanju vrednosti Indeksa ljudskog razvoja, kojim se meri kvalitet života stanovništva, u posmatranom periodu postoji značajna statistička razlika između Srbije sa jedne, i Rumunije i Albanije sa druge strane. Takođe, utvrđeno je da takva razlika ne postoji između grupe zemalja članica, i grupe zemalja koje apliciraju za prijem u EU. Ovakav ugao posmatranja nacionalne ekonomije i egzaktni pristup, nisu uobičajeni u našoj savremenoj praksi, a mogu biti korisni kao podloga neprestanom usavršavanju privrednog sistema i vođenja ekonomske politike. Trebalo bi se ugledati na uspešnije uporedive privrede i preispitati proklamovane ekonomske koristi članstva u EU.

Ključne reči: Indeks ljudskog razvoja, statistički značajne razlike, kvalitet života stanovništva, članstvo u EU

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1. Uvod

Osnovna svrha ekonomije, kao i ostalih nauka, jeste da u svom krajnjem ishodištu učini ljudski život lakšim i boljim. Ovo svakako predstavlja najširu moguću formulaciju. Ukoliko pođemo od definicije ekonomije kao nauke koja se bavi rešavanjem pitanja optimalne alokacije ograničenih resursa koji imaju alternativnu upotrebu, možemo preciznije sagledati pitanje, koji je esencijalni, preciznije određen zadatak ekonomske nauke? U prvom koraku bi se mogli složiti sa idejom da je osnovna svrha podizanje kvaliteta života i standarda ljudi, odnosno rast blagostanja i širenje perspektiva.

Međutim, i dalje je ovo pitanje prvenstveno u sferi filozofije, jer možemo se, pre svega, zapitati šta je to kvalitet života, pa čak i šta je to životni standard? Jednoznačnog, univerzalno prihvaćenog odgovora svakako nema. U raznim vremenima i različitim društvima, definicije ovih pojmova su toliko različite, da bi samo njihova analiza zahtevala ozbiljnu i obimnu studiju. Nasuprot tome, tema našeg rada je životni standard i kvalitet života stanovnika Srbije u tačno određenom periodu, od 2007. do 2015. godine, i to u tačno određenom kontekstu. Taj okvir bi bio poređenje sa zemljama sa kojima to ima najviše smisla, kao i proširenje razmatranja na implikacije koje bi sa ovog aspekta mogli očekivati od približavanja EU.

U izlaganju koje sledi, u pregledu literature koncentrisaćemo se na aktuelne pokazatelje pogodne za analizu navedenih fenomena u ovom konkretnom slučaju. To podrazumeva prevashodno metodologiju koju je usvojila savremena ekonomska misao u Evropi, SAD, i vodećim međunarodnim institucijama koje se bave ovom problematikom.

Na taj način ćemo moći da ocenimo efikasnost privrednog sistema Srbije i kvalitet ekonomske politike koja je vođena u navedenom periodu. Posmatrajući okolne zemlje, stiće se utisak da ne postoji bitna razlika između kvaliteta života u posmatranim državama i u Srbiji. To bi bila naša prva hipoteza koju ćemo izložiti proveriti. Takođe, mišljenja smo da nema velike razlike, posmatrajući privrede sličnih karakteristika, između grupe zemalja članica EU i grupe ostalih koje su u statusu kandidata. To bi predstavljalo drugu hipotezu našeg istraživanja.

Cilj ovog rada će upravo biti da predstavi kako žive stanovnici Srbije u periodu nakon osamostaljenja i poređenje postignutih rezultata sa okolnim zemljama. Imajući u vidu u najvećoj mogućoj meri, prvenstveno ekonomski aspekt ove složene problematike, dobićemo najrelevantniju ocenu rezultata savremene srpske ekonomije. Takođe ćemo razmotriti i realnost očekivanja da se ovi, po našem mišljenju, najvažniji parametri mogu popraviti pristupanjem EU.

2. Kvalitet života, standard stanovništva i njihov ekonomski aspekt

U poslednjoj deceniji, po našoj oceni, domaći ekonomisti nedovoljno izučavaju ove probleme srpskog društva. Uglavnom se bave standardnim makroekonomskim problemima kao što su privredni rast, inflacija, platni bilans, kurs domaće valute, nezaposlenost, investicije, zaduženost... Istini za volju, i strani ekonomisti su se dugo ustručavali od bavljenja ovim suštinskim pitanjima, što zbog njihovog graničnog položaja u odnosu na "čistu" ekonomsku nauku, što zbog nedostatka relevantnih statističkih istraživanja. Bez obzira što je poslednjih decenija statistika učinila bitan napredak u ovom pravcu, veće interesovanje domaćih ekonomista se i dalje očekuje. Nije dovoljno samo analizirati prosečne plate, kako se to sporadično čini, već se treba kompleksnije baviti ne samo životnim standardom, već, još važnije, ukupnim kvalitetom života stanovništva.

Smatramo da je neophodno analizirati raspoložive međunarodno uporedive podatke koji najbolje prezentuju navedene fenomene i objektivno oceniti mesto savremene srpske ekonomije u okruženju, te utvrditi poziciju Srbije kao samostalne države u XXI veku. Takođe bi trebalo sagledati i šta bi se u ovom smislu moglo očekivati od strateškog opredeljenja Srbije da postane punopravni član EU.

Za početak kao najjednostavniju definiciju možemo prihvatiti onu koja kaže da se „... pod životnim standardom podrazumeva dostignuti stepen zadovoljavanja raznovrsnih ljudskih potreba.“¹ Ovo je, naravno, zbog svoje opštosti, veoma široka definicija koja u sebi može sadržavati čitav spektar životnih uslova od kojih mnogi nemaju dovoljno čvrste, direktne i značajne veze sa ekonomijom da bi bili predmet našeg razmatranja. Za najužu moguću sadržinu pojma standarda stanovništva, koja je i bila istorijski prva u fokusu izučavanja ekonomista, možemo smatrati zadovoljavanje potreba kroz potrošnju materijalnih dobara i korišćenje usluga.

Daljim razvojem ljudskog društva i ekonomije kao nauke, ovi osnovni elementi standarda su se počeli razmatrati kao suma lične i zajedničke potrošnje stanovništva određene društvene zajednice. Ovde se već, posebno u sferi zajedničke potrošnje, problematika proširuje i na usluge koje nisu prvenstveno plod privrednih aktivnosti, kao što su, npr., u prvom redu zdravstvo i školstvo, ali ih privreda u svakom slučaju finansira, odnosno obezbeđuje materijalne uslove za njihovo funkcionisanje.

Pored ovog aspekta životnog standarda koji je očigledno i neposredno povezan sa privrednim rastom i razvojem, pa samim tim i predstavlja svojevrsan odraz i merilo uspešnosti jedne ekonomije, vremenom se pojam životnog standarda sve više proširivao obuhvatajući sve više i neke prevashodno sociološke, etičke i kulturne kategorije, upotpunjujući na taj način ekonomske. Ovde pre svega mislimo na stopu nezaposlenosti, uslove rada, raspoloživo slobodno

¹ Batić Jelena (2010): *Privatizacija, raspodela, standard i kvalitet života*, Megatrend univerzitet. Beograd, 46

vreme, političke slobode, itd. Na taj način se poimanje blagostanja sve više širilo i postepeno „zalazilo“ u uobličavanje pojma ukupnog kvaliteta života.

Tokom vremena statističari su razvili metodologiju, putem koje dolaze do različitih pokazatelja životnog standarda stanovništva. U Srbiji je tako uobičajeno redovno praćenje potrošnje domaćinstava od strane Republičkog zavoda za statistiku.² Ovi se podaci prikupljaju po metodologiji usaglašenoj sa Ujedinjenim nacijama (UN), Međunarodnom organizacijom rada i Eurostatom. Pored podataka o prihodima i potrošnji domaćinstava, prikupljaju se i obrađuju i podaci o stambenim uslovima, snabdevenosti trajnim potrošnim dobrima, itd. Vrlo je važno istaći da su obuhvaćeni i novčani i prirodni prihodi domaćinstava, što je bitan element za realnu ocenu i praćenje životnog standarda. Takođe, treba istaći da Zavod prati i zajedničku potrošnju, pre svega preko budžetske potrošnje.

U studiji o životnom standardu stanovnika Srbije u periodu od 2002. do 2007. godine³ Republički zavod za statistiku se ovom problematikom bavio mnogo detaljnije nego u redovnim godišnjim izveštajima. Zato je prava šteta što slično istraživanje nije urađeno u potonjih deset godina, a što bi pokrivalo veoma značajan period razvoja Srbije kao samostalne države. U pomenutoj studiji je, pored prethodno navedenih aspekata standarda koji se obrađuju u redovnim Statističkim godišnjacima, osvetljeno još nekoliko važnih oblasti i to pre svih profil siromaštva, zatim socijalna i zdravstvena zaštita, obrazovanje, radni status, snabdevanje vodom i sanitarne usluge.

U statističkoj godišnjoj publikaciji Eurostat-a⁴ standard stanovništva se prati, takođe, kroz niz raznovrsnih pokazatelja. Poglavlje koje je u celosti posvećeno ovoj problematici nosi naziv „Uslovi života“. Tu spadaju: društvena inkluzija, raspodela prihoda, uslovi stanovanja, socijalna zaštita i kriminal u društvu, što sve više „zalazi“ u širi pojam kvaliteta života ljudi uključujući njihove razvojne perspektive.

U svetskoj nauci kvalitet života je noviji i širi koncept od samog standarda života. On u krajnjoj liniji predstavlja svojevrsno „proširenje“ pojma standarda. Zato su brojne definicije ova dva pojma slične, a elementi koji ih sačinjavaju se prepliću. U svakom slučaju, oštru granicu među njima je teško povući, ali i kvalitet života, kao i standard, imaju bez ikakve sumnje snažnu ekonomsku komponentu. Međutim, kako je i sam životni standard mnogo više od ekonomije, to je svakako i kvalitet života. Relativno kasno shvatanje značaja problematike kvaliteta života, kao i složenost njegovog ocenjivanja su usloveli da se sa intenziv-

² Republički zavod za statistiku Srbije (2017): Statistički godišnjak Republike Srbije 2016, Beograd, 122-159

³ Republički zavod za statistiku Srbije (2008): Studija o životnom standardu – Srbija 2002-2007, Beograd

⁴ Eurostat (2017): Key figures in Europe 2016 edition, Luxemburg Publication Office of the European Union

nim istraživanjem ove teme, i kompleksnijim rezultatima, srećemo tek u drugoj polovini prošlog veka.⁵

Kvalitet života stanovnika jedne zemlje, shvaćen kao nivo blagostanja i mogućnost izbora, sigurno dosta zavisi od stepena njenog ekonomskog razvoja, ali i od kvaliteta njenih institucija. Pored životnog standarda, ljudima je neophodno i zdravlje, obrazovanje, bezbednost, zdravo okruženje, političke i druge slobode, i još mnogo toga. Mnogi savremeni autori smatraju da je suština kvaliteta života u kombinaciji standarda stanovništva i očuvanja i unapređenja čovekove okoline.⁶ Tu se insistira na kombinaciji dobrobiti ljudi i ekosistema. Pod blagostanjem ljudi se podrazumeva mogućnost da svi članovi društva zadovolje svoje potrebe, kao i da imaju široke mogućnosti za realizaciju svojih potencijala. Sa druge strane, u dobrom stanju je onaj ekosistem koji održava svoju raznolikost i kvalitet, i tako podiže kvalitet ljudskog života, obezbeđujući široke mogućnosti za budući razvoj.⁷ U ovom konceptu se standard stanovništva posmatra kroz pet dimenzija i to: zdravlje, bogatstvo, obrazovanje, jednakost i društveni odnosi. Kvalitet ekosistema se, pak, posmatra kroz stanje zemlje, vode, vazduha, očuvanje genetske raznolikosti i korišćenje resursa.

Jedan od najviše upotrebljivanih pokazatelja kvaliteta života je tzv. Indeks ljudskog razvoja (Human Development Index, u daljem tekstu – HDI) koji koriste Ujedinjene nacije počev od 1990. godine u svojim redovnim godišnjim izveštajima. Ovaj sintetički pokazatelj se vremenom razvijao, a obuhvatnost izveštaja je rasla. Tako u Izveštaju za 2016-tu godinu imamo stanje za 180 država, a Indeks se sastoji od četiri komponente.⁸ Prate se sledeći elementi životnog standarda i kvaliteta života, koji svi zajedno ulaze u obračun integralnog HDI:

1. Očekivano trajanje života prilikom rođenja;
2. Očekivane godine školovanja;
3. Prosečno trajanje školovanja;
4. Bruto nacionalni dohodak po glavi stanovnika.

Kao što se može zaključiti iz ovog kratkog pregleda osnovnih i najčešće korišćenih definicija i pokazatelja, teško je u teoriji i praksi razgraničiti životni standard i kvalitet života, pošto su to izuzetno složeni fenomeni koji se prožimaju. U svakom slučaju možemo se složiti da je kvalitet širi pojam od standarda, ali da oštra granica ne postoji. Ukoliko tražimo odgovor na ključno pitanje kakav je život ljudi u različitim zemljama u svetu, i odgovor pokušavamo objektivizirati kroz statističko praćenje, utisak je da se najviše možemo osloniti na već pomenute godišnje izveštaje UN pod nazivom Human Development Report. Ovome

⁵ Batić Jelena, 50

⁶ Prescott-Allen Robert (2001): *The wellbeing of nations: a country-by-country index of quality of life and the environment*, Island Press, Washington

⁷ Ibid, 5

⁸ United Nations Development Programme (2016): *Human Development Report 2016*, Human Development for Evryone, New York

ima više razloga. Kao prvo, ovi izveštaji se rade relativno dugo i u kontinuitetu. Obuhvataju najveći broj zemalja u svetu, i pored samog HDI i njegovih sastavnih elemenata, sadrže i niz drugih indikatora koji su veoma uticajni na životni standard i kvalitet života stanovništva. Sam HDI, pak, u sebi sintetizuje nivo blagostanja, širinu izbora i perspektive stanovnika jedne zemlje.

3. Kvalitet života u Srbiji i okruženju

Iz prezentovanih osnovnih postavki i pojmova vidimo značaj i kompleksnost pojmova životnog standarda i kvaliteta života. U analizi koja sledi bavićemo se Srbijom sa tog aspekta. U tom smislu ćemo, ograničeni obimom rada, odabrati samo jedan reprezentativni pokazatelj kojim ćemo se služiti i koji mora zadovoljiti dva osnovna uslova. Prvo, mora što potpunije oslikavati kvalitet života stanovništva. Drugo, odabrani podaci moraju biti dostupni iz relevantnih izvora za analizirani period i sve uporedive zemlje obuhvaćene analizom.

Pri tom, pod relevantnim izvorima podrazumevamo u prvom redu međunarodnu statistiku, i mogućnost da se jedan pokazatelj, radi metodološke korektnosti, koristi iz istog izvora za ceo period proučavanja i sve posmatrane subjekte. Analizirani period će biti aktuelni ekonomski trenutak Srbije kao samostalne države u ovom veku, odnosno nakon 2007. godine. Kada govorimo o drugim zemljama za koje su nam potrebni podaci, odabrali smo zemlje iz neposrednog okruženja, odnosno zemlje sa kojima se Srbija graniči.

Za statističku obradu podataka u radu korišćen je programski paket SPSS i statističke funkcije, a zbog tipova promenljivih za testiranje hipoteza korišćen je *Studentov t-test* i jednofaktorska analiza verijanse (ANOVA).

Studentov t-test koristi se za testiranje značajnosti razlika između dve aritmetičke sredine. Uslov za primenu ovog testa je da, ukoliko je veličina uzorka manja od 30, raspored treba biti normalan ili bar simetričan.

Normalnost rasporeda proveravamo na sledeći način: ako je

$$\frac{\text{Skewness}}{\text{SE}} \in [-1,96; 1,96] \text{ i } \frac{\text{Kurtosis}}{\text{SE}} \in [-1,96; 1,96] \text{ onda promenljiva ima normalan raspored.}$$

Analiza varijanse se koristi za poređenje aritmetičkih sredina tri ili više osnovna skupa, jednim testom.

Statističko zaključivanje zasnivamo na osnovu uzorka na kome donosimo određene zaključke o samoj populaciji (statističkom skupu). Iskaz ili pretpostavku (hipotezu) testiramo standardnim statističkim postupkom testiranjem hipoteze.

Hipoteza koja se ovim postupkom testira naziva se nulta hipoteza (u oznaci H_0), nasuprot je alternativna hipoteza (u oznaci H_1) tj. iskaz u koji se veruje u slučaju da uzorkovani podaci dovedu do odbacivanja nulte hipoteze.

Statističko zaključivanje baziramo na vrednosti statistike testa ukoliko je vrednost statistike testa u *oblasti prihvatanja*. Ako primenjujemo princip zasnovan na vrednosti verovatnoće, t.j., p - vrednosti: (p -vrednost veća od nivoa značajnosti) - prihvatamo nultu hipotezu, inače je odbacujemo (p -vrednost jednaka ili manja od nivoa značajnosti). Pri tom, p - vrednost se definiše kao najmanji nivo značajnosti na kojem se nulta hipoteza odbacuje.

3.1. Humani razvoj u Srbiji i okolnim zemljama

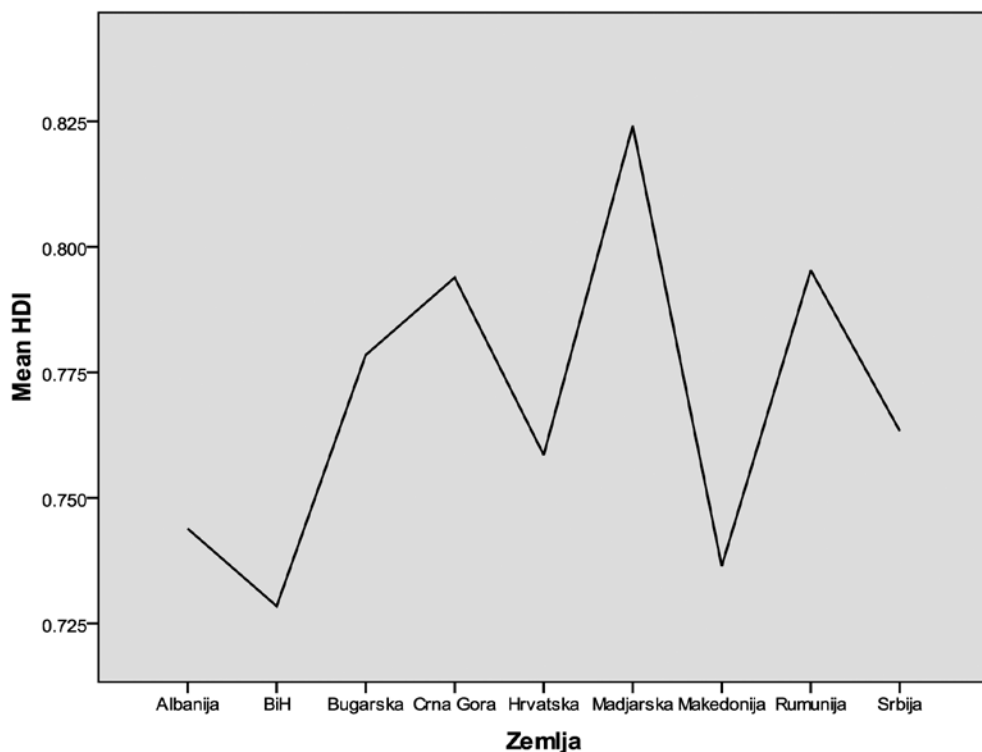
Prvo ćemo analizirati kvalitet života stanovnika Srbije u poređenju sa susednim zemljama. Koristeći kao izvor Razvojni program Ujedinjenih nacija (United Nations Development Programme, u daljem tekstu – UNDP), razmatraćemo vrednosti indikatora ljudskog razvoja za svaku zemlju. Posmatrajući promenljivu HDI za svaku od država, možemo odrediti prosečne vrednosti kao i konstruisati interval poverenja za pomenutu promenljivu. Intervalna ocena parametra populacije Q predstavlja interval vrednosti u kome sa određenom verovatnoćom očekujemo da se nalazi parametar populacije Q , i to takav interval da je verovatnoća da je vrednost parametra Q veća od gornje granice intervala, jednaka verovatnoći da je vrednost parametra Q manja od donje granice intervala. Po zemljama to izgleda ovako:

Tabela 1. *Srbija i susedi prema prosečnoj vrednosti HDI*

Zemlja	Prosečna vrednost HDI	95% interval poverenja za HDI
Mađarska	0,842	(0,817 - 0,830)
Rumunija	0,795	(0,791 - 0,800)
Crna Gora	0,794	(0,786 - 0,802)
Bugarska	0,778	(0,770 - 0,787)
Srbija	0,763	(0,756 - 0,771)
Hrvatska	0,759	(0,749 - 0,768)
Albanija	0,744	(0,729 - 0,759)
Makedonija	0,736	(0,728 - 0,744)
Bosna i Hercegovina	0,728	(0,716 - 0,741)

Izvor: Izračunato prema Tabeli 1. u Dodatku

Iz priloženih podataka možemo uočiti da najveći prosečan HDI ima Mađarska $\bar{x}_{HDI} = 0,824$ a najniži Bosna i Hercegovina $\bar{x}_{HDI} = 0,728$. Na Slici 1. su prikazane prosečne vrednosti HDI za posmatrane zemlje.

Slika 1. Prosečane vrednosti HDI Srbije i susednih zemalja

Izvor: Autori

Na prvi pogled možemo reći da posmatrane zemlje ne obezbeđuju svojim stanovnicima vrhunski standard i kvalitet života, gledano u svetskim razmerama, osim donekle Mađarske. Pri tom, treba imati u vidu da je teoretska maksimalna vrednost indeksa humanog razvoja 1, a da postoje države u svetu u kojima je on decenijama iznad vrednosti 0,9.

Kako je veličina uzorka manja od 30 (po zemlji, posedujemo podatke od 2007. do 2015. godine) potrebno je proveriti normalnost rasporeda za promenljivu HDI za svaku od država. Za promenljivu HDI po izračunavanju deskriptivnih mera i provere, utvrđeno je da promenljiva HDI za svaku od zemalja ima normalan raspored i shodno tome možemo koristiti Studentov t-test za proveru prve hipoteze našeg istraživanja.

Ako želimo da proverimo da li postoji značajna razlika u HDI Srbije i svake od posmatranih zemalja pojedinačno, nakon izračunavanja dobijamo podatke prikazane u Tabeli 2:

Tabela 2. Vrednosti statistike *t* - testa

	Zemlja	Statistika testa (Sig.)
Srbija	Mađarska	0,471
	Rumunija	0,034
	Bugarska	0,862
	Hrvatska	0,459
	Crna Gora	0,713
	Makedonija	0,756
	Bosna i Hercegovina	0,078
	Albanija	0,006

Izvor: Izračunato prema Tabeli 1. u Dodatku

Iz Tabele 2, na osnovu vrednosti statistike testa (Sig.), možemo zaključiti da postoji statistički značajna razlika u HDI Srbije i Rumunije, i Srbije i Albanije (vrednost Sig. < 0,05). Na taj način vidimo da putem statističke analize nije potvrđena naša prva hipoteza da između Srbije i susednih zemalja u posmatranom periodu ne postoje značajne statističke razlike po pitanju kvaliteta života koji smo ovde prezentovali putem HDI. Srbija po ovom kriterijumu zauzima srednju poziciju, i najviše zaostaje za Rumunijom, koja je inače u samom vrhu, i član je EU od početka posmatranog perioda. Iza Srbije, prema ovoj analizi najviše zaostaje Albanija, od koje bi to tradicionalno mogli i očekivati. Dakle, između Srbije i ove dve susedne zemlje po pitanju našeg istraživanja postoje značajne razlike.

3.2. Humani razvoj i članstvo u EU

Ako želimo da proverimo da li postoji značajna razlika u HDI zemalja koje su članice EU i onih koje to nisu, potrebno je napraviti dve grupe. Jednu grupu čine zemlje članice EU (Mađarska, Rumunija i Bugarska), a drugu one koje nisu članice (Srbija, Hrvatska, Makedonija, Crna Gora, Albanija i BiH). Hrvatsku ćemo ovom prilikom posmatrati kao zemlju van EU, jer je postala članica pri samom kraju posmatranog perioda (2013. godine).

Nakon izračunavanja konstatujemo da ne postoji značajna razlika u HDI među ovim grupama (Sig.=0,369>0,05). Takođe, možemo u Tabeli 3 videti da je prosečna vrednost HDI zemalja članica EU 0,799 sa standardnom devijacijom 0,021 a, prosečna vrednost HDI zemalja koje nisu članice EU je 0,753 sa standardnom devijacijom 0,025. Za pomenute grupe možemo izračunati i koeficijente varijacije i proveriti homogenost podataka u seriji.

Koeficijent varijacije za zemlje članice EU iznosi , $v = \frac{s}{\bar{x}} \cdot 100 = \frac{0,021}{0,799} \cdot 100 = 2,63\%$ odnosno za zemlje koje nisu članice koeficijent varijacije

cije iznosi $v = \frac{s}{\bar{x}} \cdot 100 = \frac{0,025}{0,753} \cdot 100 = 3,32\%$ Oba koeficijenta varijacije su manja od 30% pa su podaci u posmatranim serijama homogeni.

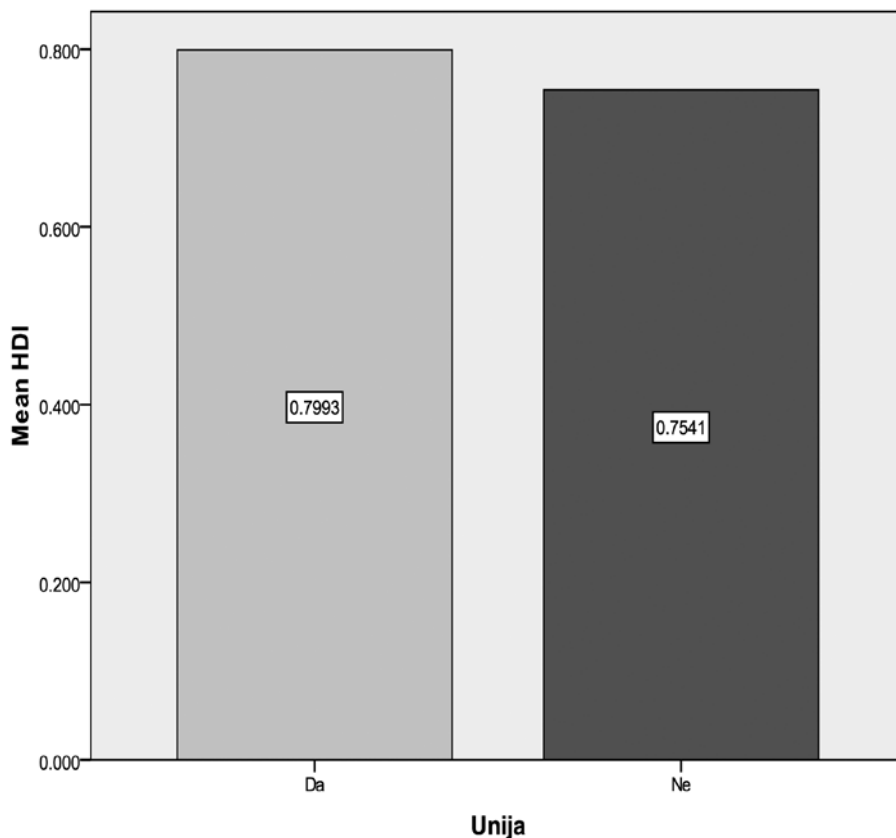
Tabela 3. Prosečne vrednosti i standardne devijacije HDI za zemlje članice EU i one koje to nisu

	Unija	N	Prosečna vrednost	Standardna devijacija	Standardna greška
HDI	Da	27	0.79930	0.021044	0.004050
	Ne	54	0.75415	0.025366	0.003452

Izvor: Izračunato prema Tabeli 1. u Dodatku

Prosečne vrednosti HDI za zemlje koje su članice EU, i onih koje to nisu možemo prikazati i na grafikonu.

Slika 2. Prosečan HDI zemalja članica EU, i onih koje to nisu



Izvor: Autori

Iz ove analize proizilazi da je naša druga hipoteza u istraživanju potvrđena, odnosno da nema značajne statističke razlike u prosečnoj vrednosti HDI, kao usvojenom merilu kvaliteta života ljudi za posmatrani period, između grupe zemalja koje su članice EU i onih koje to nisu. Ovo svakako predstavlja veoma važan rezultat, i makar u ekonomskom aspektu dovodi u pitanje konstantnu težnju Srbije u XXI veku da što pre postane članica ove integracije. Jer, ukoliko je cilj ekonomije da ljudi bolje žive, vidimo na primeru uporedivih zemalja da to u praksi proteklog perioda nije potvrđeno ulaskom u Uniju. Ukoliko Mađarska (članica od 2004. godine) i Rumunija i Bugarska (članice od 2007. godine) nisu kao grupacija uspele da značajnije odmaknu u ovom pogledu od obližnjih zemalja sa kojima je vršeno poređenje, kakva je tek perspektiva ovih drugih u tom pogledu?

Činjenica je da se ovde analizira period nakon izbijanja ekonomske krize u svetu, ali to ne menja mnogo na suštini. To može samo značiti da članstvo u EU ne štiti dovoljno manje razvijene članice (a takve su sve analizirane zemlje) od globalnih ekonomskih potresa. A onda se postavlja pitanje i same svrhe ulaska u integraciju. Uostalom, EU se nije pokazala u celom posmatranom periodu efikasna ni u rešavanju migrantske krize, ni u borbi protiv terorizma, i da ne nabrajamo dalje. U principu, u svakoj kriznoj situaciji se siromašne članice moraju dovijati same u iznalaženju rešenja. To opravdava skepsu mnogih koji se onda pitaju koji je cilj priznavanja supremacije briselske birokratije nad nacionalnim suverenitetom, ukoliko kvalitet života nije viši, i ako nema veće zaštite od svet-skih potresa?

Jednostavno, smatramo da treba staviti veliki upitnik na sve radove naših ekonomista koji neprestano zagovaraju ulazak u EU obrazlažući to širenjem ekonomskih perspektiva Srbije. Ističu se brojne prednosti velikog tržišta, slobode kretanja robe, ljudi i kapitala, i različite druge prednosti. Ukoliko ovde ostavimo po strani aktuelne sankcije EU prema Ruskoj federaciji (kakav bi to bio doprinos srpskoj ekonomiji?), nismo se uverili u savremenoj praksi uporedivih zemalja da se te "prednosti" očituju u bitnom poboljšanju kvaliteta života njihovih stanovnika.

4. Zaključak

Predmet ovog istraživanja je bio standard i ukupan kvalitet života stanovništva Srbije u poređenju sa okruženjem. Mišljenja smo da su susedne zemlje jedine sa kojima ima konstruktivnog smisla posmatrati Srbiju u ekonomskom smislu. Za ugao našeg posmatranja odabrali smo kvalitet života kao krajnji efekat funkcionisanja jedne nacionalne privrede. Pored toga što to odslikava blagostanje, mogućnosti izbora i perspektive ljudi, smatramo da to najbolje govori i o performansama jednog privrednog sistema i uspešnosti aktuelne ekonomske politike.

Svrha istraživanja je u osnovi bila da predstavi Srbiju u kontekstu njenog okruženja sa ciljem realnog sagledavanja njene ekonomije u periodu funkcio-

nisanja kao samostalne države u ovom veku, s obzirom da se često susrećemo sa ekstremnim stavovima u javnosti kako “smo lideri u regionu”, ili pak da smo veoma zaostali i da nema boljitka dok ne postanemo članica EU. Želeli smo da u okvirima ovog rada pokušamo da predstavimo ova dva pitanja u što egzaktnijem vidu.

Kao najpogodniji raspoloživi parametar za analizu smo odabrali HDI koji smo koristili da proverimo dve hipoteze. Prva je bila da između Srbije i njenih suseda u periodu nakon 2007. godine nema značajnih razlika po ovako iskazanom kvalitetu života stanovništva, a druga da ne postoji bitna razlika po istom pitanju između grupe zemalja članica EU i grupe onih koje to još nisu, a takođe pripadaju posmatranom uzorku od devet država.

Utvrdili smo da postoji značajna statistička razlika u prosečnoj vrednosti HDI u posmatranom periodu između Srbije i Rumunije, kao i Srbije i Albanije. Mogli bi izvesti na osnovu ovoga zaključak da je prva hipoteza samo delimično potvrđena, s obzirom da značajna razlika postoji u slučaju navedene dve zemlje, dok kod ostalih šest nje nema. Što se tiče druge hipoteze, ona je u potpunosti potvrđena, odnosno ne postoji statistički značajna razlika između Mađarske Rumunije i Bugarske sa jedne strane i grupe ostalih posmatranih zemalja sa druge strane, po pitanju prosečne vrednosti HDI u periodu 2007 – 2015. godine.

Ovi zaključci su veoma indikativni, ali za kompleksniju ocenu srpske ekonomije je svakako potrebno više istraživanja. Kao prvo, već smo istakli višedimenzionalnost i kompleksnost pojma životnog standarda i kvaliteta života stanovništva. Zbog obima rada, a i zbog ograničene dostupnosti ostalih podataka, za analizu je odabran samo jedan, po nama, u ovom trenutku najreprezentativniji. Tako su proverom hipoteza navedenom statističkom metodologijom utvrđene činjenice koje u širem smislu ne možemo apsolutizovati, ali verujemo da ih i mnogo obimnija istraživanja u okviru ove tematike ne mogu eksplicitno u potpunosti opovrgnuti.

Na kraju, želeli bismo da ponovimo nekoliko stavova koje smo izložili. Pravi smisao ocene uspešnosti nacionalne ekonomije se ogleda u životnom standardu, i još potpunije, u kvalitetu života stanovništva kao širem konceptu. Uspešnost savremene srpske privrede ima smisla posmatrati tek nakon oformljenja samostalne države, i to u poređenju sa okolnim zemljama. Ustanovljeno je da bi kao primer za ugled iz ugla našeg posmatranja, među odabranim zemljama mogla biti samo Rumunija. U tom smislu se treba pozabaviti njihovim iskustvima, i sigurno neka pokušati kreativno primeniti. Takođe, utvrđeno je da među analiziranim zemljama grupa članica EU nije značajno naprednija od grupe ostalih. To svakako stavlja pod znak pitanja vladajući politički stav da članstvo u ovoj integraciji obavezno vodi boljem životu i ekonomskom napretku.

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Dodatak

Tabela 1. *Srbija i susedi po vrednosti HDI*

ZEMLJA	2007	2008	2009	2010	2011	2012	2013	2014	2015
Madjar	0.812	0.816	0.817	0.821	0.823	0.824	0.834	0.834	0.836
C. Gora	0.774	0.785	0.787	0.792	0.797	0.799	0.803	0.804	0.807
Rumun	0.780	0.795	0.797	0.798	0.797	0.794	0.797	0.798	0.802
Bugar	0.761	0.768	0.770	0.775	0.778	0.781	0.787	0.792	0.794
Srbija	0.749	0.754	0.755	0.757	0.767	0.766	0.771	0.775	0.776
Hrvat	0.740	0.747	0.749	0.752	0.758	0.762	0.768	0.775	0.776
Albanija	0.713	0.721	0.725	0.738	0.752	0.759	0.761	0.762	0.764
Maked	0.714	0.730	0.732	0.735	0.739	0.741	0.743	0.746	0.748
B i H	0.710	0.716	0.717	0.711	0.728	0.735	0.742	0.747	0.750

Izvor: www.hdr.undp.org/en/data

WELFARE AND PERSPECTIVES OF SERBIAN RESIDENTS

The topic of this paper is the assessment of the Serbian economy through the prism of life standard and the quality of life of the population in general, which we consider to be the most important criterion. In order to get the most realistic picture, this research was carried out with the aim of comparing the economy of Serbia with neighbouring countries. They all form two groups: EU members and the candidates, where the quality of life of the population is compared in order to determine the differences between them. Two statistic methods were used in the analysis - Student's T-test and Single-factor Analysis of Variance (ANOVA). They show that the period which was taken for the analysis, reveals a significant statistic disagreement between Serbia on one part, and Romania and Albania on the other part, regarding the Human Development Index which measures the quality of life of one country per capita. It was also found that such a difference does not exist between a group of member states and groups of candidate countries for EU accession. This angle of observation of the national economy and exact approach are not common in our modern practice and can be useful as a basis for continuous improvement of the economic system and economic policy. One should look up to more successful comparative economies and re-examine the proclaimed economic benefits of EU membership.

Keywords: Human Development Index, statistically significant differences, quality of life of the population, EU membership

ODNOS IZMEĐU KVALITATIVNOG I KVANTITATIVNOG VREDNOVANJA UČINKA EKONOMSKE DIPLOMATIJE

Pitanje koje se postavlja tokom procesa određivanja i primene odabranog modela ekonomske diplomatije vrlo je često i dobro poznato - na koji način objektivno izmeriti i oceniti efekat rada ekonomske diplomatije? Iako bi sistem evaluacije performansi trebalo predvideti i projektovati zajedno sa početkom implementacije odabranog modela, vrlo često to nije slučaj. Veoma je važno precizirati evaluaciju performansi sistema, kako bi unapred bili poznati parametri primenjeni prilikom procene postignutih rezultata. Izo- stanak uspostavljanja ovih parametara, u kasnijoj fazi, prilikom praćenja rada ekonom- ske diplomatije, predstavlja nemalu poteškoću. Razlozi za odsustvo jasnih kriterijuma procene rezultata višestruki su i prvenstveno povezani sa problemom efikasne kombi- nacije i jasnog odnosa između kvalitativne i kvantitativne komponente rezultata rada ekonomskih diplomata. Međutim, uprkos činjenici da ova vrsta istraživanja do sada nije donela jasan model preciznog utvrđivanja performansi ekonomskih diplomata, naponi u projektovanju metode merenja rezultata, u ranoj fazi uspostavljanja modela, predstav- ljaju osnovu za stabilnu i doslednu primenu odabranog modela.

Ključne reči: ekonomska diplomatija, model, evaluacija, kvalitativno i kvantita- tivno merenje.

1. Pojam i definicija ekonomske diplomatije

Kada se definicija ekonomske diplomatije razmatra, uobičajeno je mišljenje da se radi o spajanju pojmova ekonomije i diplomatije, te se tako, u leksičkom smislu, dobija kovanica ekonomska diplomatija. Prema takvom mišljenju, smatra se da se i u praktičnom smislu radi o poslu koji se obavlja tako što se naprosto kombinuju delovi te dve oblasti, tamo gde je, i na način kako je potrebno. Takav način raz- mišljanja ne pravi suštinsku razliku između ekonomske diplomatije, ekonomije i diplomatije, te adekvatno tome, uobičajeno je mišljenje da se poslovi ekonom- ske diplomatije odvijaju spontano kroz pomenute dve oblasti, te da nije potreban poseban napor, angažman, struktura ni kadrovi u oblasti ekonomske diplomatije.

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Nasuprot tome, svedoci smo da ekonomska diplomatija zauzima sve više prostora u nastupu zemalja prema inostranstvu i, shodno tome, postaje doktrina koja se, mada još uvek na našim prostorima prilično stidljivo, sve više uklapa u međunarodne globalne tokove, posebno ekonomske globalne tokove, koji rame uz rame sa političkim nastupom, čine suštinu delovanja ekonomske diplomatije.

Ekonomsku diplomatiju nije lako definisati, jer ovaj pojam ima više značenja i puno elemenata koji utiču na deskripciju. Razni teoretičari i pisci literature na ovu temu daju sopstvene definicije, u skladu sa ličnim shvatanjem, u odnosu na suštinu ekonomske diplomatije. Na neki način, može se reći, većina definicija je relevantna. Razlikuju se uglavnom u tumačenju suštine i u odnosu na to, davanja prednosti u formiranju same definicije, prema jednom ili drugom prioritetu u odnosu na ukupnost shvatanja ekonomske diplomatije. Pri tome, bitan je istorijski period u kome je definicija data, jer je za razumevanje konteksta važno da li su pojmovi, odnosno procesi, kao što je, na primer, globalizacija i sklop tehnoloških svetskih interkonekcija (moderna sredstva povezivanja i komunikacija) bili prisutni i relevantni u posmatranom periodu.

Prema uobičajenim podelama, ekonomsku diplomatiju možemo zapaziti u bilateralnom i multilateralnom obliku dok, kada se radi o učesnicima u njenom sprovođenju, uglavnom se razmatraju državni i nedržavni oblici ekonomske diplomatije. U državne učesnike spadaju državni subjekti, ministarstva, ambasade, privredne komore itd. U nedržavne spadaju svi ostali učesnici.

Prof. dr Vladimir Prvulović, jedan od nesporno najvećih autoriteta kada je o ekonomskoj diplomatiji reč, ne samo u Srbiji već i regionu i šire, autor mnogih naučnih radova i udžbenika na ovom polju, ekonomsku diplomatiju definiše kao: "Specifičan i istančan spoj diplomatije u klasičnom smislu, ekonomskih nauka i nauka menadžmenta, metoda i tehnika pregovaranja sa stranim partnerima, odnosa sa, javnošću i prikupljanja ekonomskih informacija od interesa za privredu svoje zemlje ili kompanije, u cilju prodora na svetsko tržište".¹

Pored mnogih drugih autora, jednu od definicija ekonomske diplomatije dao je Piet Stil (Piet Steel), počasni konzul Japana u Regionu Belgije – Flandriji. Ova definicija, iako zbog svoje dužine relativno rasplinjava suštinu, opisuje ekonomsku diplomatiju posmatranu iz ugla poslovnih ljudi: „Ekonomska diplomatija je umetnost promocije ekonomskih i komercijalnih interesa svoje zemlje u svetskoj ekonomiji brzih promena. Ekonomski diplomata je istovremeno glasnogovornik i isturena tačka za poslovne subjekte svoje zemlje. On ne pravi razliku između velikih korporacija i malih i srednjih preduzeća. Razume njihove potrebe i zna kako da efikasno u njihovu korist komunicira sa vladama drugih zemalja i međunarodnim institucijama. U međunarodnim trgovinskim pregovorima ima sluha za stavove poslovnih aktera. Oseća se prijatno u kulturološki raznolikom poslovnom okruženju, stalno nastoji da razume i postavi pitanja i probleme u pravilan kontekst i zna kako da razgovara sa ljudima, bez obzira na

¹ Проф. др. В. Првуловић, Економска дипломатија, Мегатренд Универзитет, 2010, стр. 19.

njihovu funkciju i položaj u društvu. Dostupan u svakom trenutku da pomogne u stvaranju pravog ambijenta radi ostvarenja poslovnih dogovora.“²

Bitan preduslov za delovanje ekonomske diplomatije, u svetlu prethodno iznete definicije profesora Prvulovića, jeste razvijen sistem praćenja i evidentiranja postignutih poslovnih rezultata, sveobuhvatno posmatrano. U sklopu toga, neophodno je angažovanje, osim nosilaca aktivnosti, i drugih institucija, kao što su Statistički zavod, Uprava carina, Privredna komora, Razvojna agencija, Agencija za osiguranje i finansiranje izvoza. Do potpunih i sveobuhvatnih podataka može se doći samo usklađenim delovanjem pobrojanih, i drugih učesnika. Na taj način, pravilnim praćenjem i upoređivanjem podataka moglo bi se, tokom vremena, raditi na primeni principa „Cost - Benefit” odnosno „ulaganje – dobit“ i na transparentan način, argumentovano, vršiti korekcije i promene, kako u kadrovskom, tako i u sistemskom pogledu.

Jedan od elemenata uspešnosti, kao što je već navedeno, jeste metod valorizacije rada, koji bi između ostalog integrisao i kvalitativnu i kvantitativnu komponentu merenja rezultata. Ovakva integrisana ocena mogla bi biti, prilagođena aktivnosti ekonomske diplomatije, jedan od vodećih elemenata prilikom razmatranja rada i rezultata ekonomskih diplomata. Ovo posebno dobija na značaju kada znamo da Radna ocena predstavlja zakonsku obavezu, u skladu sa Uredbom Vlade Srbije o ocenjivanju državnih službenika³ (pod uslovom da je usvojena premissa da su ekonomske diplomate državni službenici, za šta se autor ovog rada zalaže). Prema ovoj Uredbi neposredni rukovodilac u obavezi je da Radnu ocenu sačini za svakog državnog službenika pri čemu bi, za ekonomske diplomate ona, osim kvalitativnog dela, sadržala i kvantitativnu komponentu, dobijenu usvojenom metodom prikazavanja postignutih rezultata u brojkama.

2. Vrednovanje rezultata ekonomskih diplomata

Za pravilno vrednovanje učinka ekonomskih diplomata, kako je već rečeno u prethodnom delu teksta, veoma su bitni prethodno uspostavljeni kriterijumi. Zadati kriterijumi uspostavljaju jasna pravila i stavljaju pred ekonomske diplomate zadatke koje treba ispuniti. U praksi se, međutim, dešava da se evaluacija rezultata obavlja naknadno, stihijski, što prouzrokuje brojne teškoće i nerazumevanje. Razlozi za izostajanje uspostavljanja jasnih kriterijuma ocenjivanja više-struki su:

- nepostojanje jasnih kriterijuma razgraničenja odnosa između kvalitativnog i kvantitativnog učinka;

² Steel P, Brošura, Brussels Diplomatic Academy, Vrije Universiteit Brussel, 2013, 10, <http://bda.typografics.online/wp-content/uploads/2017/05/BDA-Brochure-2016.pdf> (28.05.2017).

³ Sl. glasnik RS, br. 11/2006 i 109/2009. Beograd.

- nemogućnost predviđanja eventualnih promena političkih i ekonomskih odnosa sa pojedinim državama;
- teškoće prilikom uspostavljanja kriterijuma za period ocenjivanja u odnosu na promene okolnosti rada ekonomskog diplomate, u toku trajanja mandatnog perioda,
- mogućnost promena koje mogu biti izazvane globalnom ili regionalnom političkom ili ekonomskom krizom.

Kriterijumi za ocenjivanje rada vezani su za više parametara, koji su bitni za rad i evaluaciju učinka ekonomskih diplomata. Od suštinske je važnosti da kriterijumi za ocenjivanje, kao što smo već rekli, budu poznati pre stupanja na dužnost jer se na taj način ukazuje na očekivani stepen uspešnosti ekonomskih diplomata. Smatramo da kriterijumi za ocenjivanje učinka treba da:

- ukazuju kakvi se rezultati očekuju kao i da daju kandidatu mogućnost prethodne procene da li ih može ispuniti;
- povećavaju stepen lične odgovornosti prema izvršavanju zadaka i poslovnih obaveza;
- predstavljaju kontrolni element u radu;
- daju mogućnost za samostalnu procenu uspešnosti i korigovanje u slučaju potrebe;
- podstiču samodisciplinu i odgovornost, u cilju izbegavanja eventualnih mera sankcija zbog neispunjenih postavljenih parametara (povratak u zemlju).

Merenje rezultata ekonomskih diplomata, veoma često, svodi se na očekivani podatak da li je, i koliko, u toku trajanja mandata ekonomski diplomata doprineo, u ciframa, povećanju izvoza u zemlju prijema, koliko je obezbedio stranih investicija iz te države, odnosno koliko je iz Republike Srbije investirano u tu državu. Traže se pozitivni statistički pokazatelji i posmatra se kako se kreću podaci o trgovinskoj razmeni, podaci o deficitu i slično. Zahteva se lični doprinos, izražen statističkim podacima za određeni period delovanja. U Republici Srbiji u javnosti se moglo često čuti i mišljenje da „ekonomske diplomate treba državi da doprinesu više nego što je u njih uloženo“, sa čime se, u principu, slažemo. Međutim, iako se, u osnovi, ovakav stav može smatrati ispravnim, do poteškoća može doći kada su:

- statistički podaci nepotpuni ili nepostojeći;
- bitno promenjene okolnosti poslovanja zbog promene poslovne klime, promene političke klime ili promene globalne ili regionalne ekonomske situacije;
- ekonomske diplomate prevashodno usmerene na druge aktivnosti (prikupljanje ekonomsko-obaveštajnih informacija);
- ekonomske diplomate u državu prijema upućene iz drugih (političkih) razloga.

Iako se isključivo iz ekonomskog ugla gledano, principu „koliko je uloženo – kolika je korist“, odnosno stavu da ekonomske diplomate treba da više donesu novca nego što se na njih potroši, ne može staviti primedba, to u praksi, zbog gore navedenih okolnosti, veoma često nije moguće proceniti.

Ukoliko smatramo da su, kada su u pitanju ekonomske diplomate upućene na rad u inostranstvo, sledeći elementi konstanta:

- visok stepen posvećenosti rada za opšte dobro,
- visok stepen lične odgovornosti i radne discipline,
- pravilan izbor stručnog i kvalitetnog kadra,
- uspostavljanje odgovarajućeg sistema rada ekonomske diplomatije,
- politička i društvena podrška i harmonizacija rada i sinergija svih učesnika u poslovima ekonomske diplomatije,

može se sa pravom očekivati da ovi pozitivni objektivno ustanovljeni elementi u praksi donesu dobre rezultate. Međutim, postojanje subjektivnih faktora i okolnosti koji su van uticaja uspostavljenog modela, ne mogu se zanemariti.

Na osnovu napred iznetih elemenata, kombinovanje ocene učinka, izmereno u ciframa (kvantitativno) kao i uzimanje u obzir drugih nemerljivih subjektivnih faktora (kvalitativno), smatramo nasvrshodnijim pristupom za ocenu rada ekonomskih diplomata, što u dobroj meri odslikava i stav USAID centra za informisanje i evaluaciju:

„Ima više tendencija da se napravi razlika između kvalitativnih i kvantitativnih podataka nego što je to opravdano. Ne može se sve što je važno izračunati, i mnogo toga što se može izračunati nije vredno pomena. Debata kvantitativno - prema - kvalitativnom nije pitanje izbora jednog ili drugog. U kontekstu USAID sistema za upravljanje, zasnovanog na performansama, izbor više kvantitativnih ili kvalitativnih pokazatelja zahteva kompromise između praktičnosti i troškova, objektivnosti i uporedivosti kao i neposrednosti i valjanosti merenja.“⁴

Ocena učinka ekonomskih diplomata, prema mišljenju autora ovog rada, u cilju merenja kvantitativnog (konkretnog, iznetog u brojkama) doprinosa, trebalo bi da se bazira na:

1. ukupnim postignutim ekonomskim performansama države u domenu izvoza, privlačenja stranih investicija, ulaganja u inostranstvu i promociji zemlje;
2. ostvarenim performansama (doprinosu) celokupne mreže ekonomske diplomatije;
3. pojedinačnom doprinosu ekonomskih savetnika u okviru mreže ekonomske diplomatije.

U tom cilju, kada se radi o pojedinačnom učinku, potrebno je uspostavljanje merenja takozvanih „prolaznih vremena“ ekonomskih diplomata u zemljama u

⁴ Izvod iz Praćenje i procena sprovođenja TIPS, (1998): *Smernice za indikatore i kvalitet podataka*, broj 12., USAID-ov centar za razvoj i informisanje i evaluaciju.

kojima su raspoređeni. Primer prakse ekonomskih diplomata Belgije (ekonomski atašei za spoljnu trgovinu), pokazuje okvir koji bi mogao poslužiti kao pravac ka kome bi se trebalo kretati, o čemu će biti više reči u daljem delu teksta.

3. Kvalitativno u odnosu na kvantitativno merenja rezultata

Postoje brojne razlike između kvalitativnog i kvantitativnog merenja i vrednovanja rezultata. Kada se radi o kvalitativnom vrednovanju i analizi rezultata, ono se prevashodno odnosi na analizu i interpretaciju podataka kroz posmatranje šta i kako ljudi rade, kroz pojmove, definicije, karakteristike, ponašanje i opise.

Kvantitativno istraživanje i vrednovanje rezultata odnosi se na brojeve i merenja izražena u ciframa, uglavnom prikazana kroz statističke podatke.

Kvalitativno merenje rezultata je mnogo subjektivnije od kvantitativnog i koristi veoma različite metode prikupljanja i vrednovanja rezultata i informacija. Priroda ove vrste vrednovanja bavi se opštim pitanjima i identifikuje i definiše percepcije, mišljenja i delovanje u okviru margina zadatih polja delovanja (u konkretnom slučaju ekonomske diplomatije).

Za razliku od kvalitativnih, kvantitativne opcije vrednovanja unapred su određene objektivnim kvantitativnim i statistički validnim podacima. Jednostavno rečeno, radi se o brojevima kao objektivnim i egzaktnim podacima na kojima se vrednovanje zasniva.

U osnovi, kvantitativno istraživanje je objektivno; kvalitativno je subjektivno. Adekvatan spoj između ova dva pristupa merenja rezultata ekonomske diplomatije predstavljao bi kompromis između uloženog subjektivnog napora na postizanju rezultata i realno postignutog, izraženog u brojkama.

Brojna su nastojanja da se učini kompromis i kroz razne modele ostvari potrebni spoj između ova dva metoda merenja učinka. Mina Jakup, u svom radu "Relevantnost ekonomske diplomatije - teorijsko empirijska analiza" pokušala je da izvrši obimnu analizu relevantnosti ekonomske diplomatije. U ovoj analizi primenila je makroekonomsku teoriju pomoću koncepta neuspešnih tržišta, kao glavne polazne osnove i da li u takvom slučaju ekonomska diplomatija može biti teoretski podržana. Ona navodi sledeće:

"Postojali su brojni pokušaji prikazani u naučnoj literaturi kombinovanja ekonomske teorije i teorije političkih nauka, kako bi se empirijski ispitala efikasnost ekonomske diplomatije uz poštovanje ekonomskih ciljeva, kao što je trgovinska ekspanzija. U svakom slučaju, do danas, ne postoji opšte prihvaćeni standard na koji način izvršiti takvu analizu."⁵

⁵ Yakop Mina, (2009): *The relevance of economic diplomacy, A theoretical-empirical analysis*, Thesis Economics International, Economics Department – Universiteit van Amsterdam, Den Haag, 17.

Tabela 1. Karakteristike kvantitativnog u odnosu na kvalitativno istraživanja**QUALITATIVE VERSUS QUANTITATIVE RESEARCH**

Criteria	Qualitative Research	Quantitative Research
Purpose	To understand & interpret social interactions.	To test hypotheses, look at cause & effect, & make predictions.
Group Studied	Smaller & not randomly selected.	Larger & randomly selected.
Variables	Study of the whole, not variables.	Specific variables studied
Type of Data Collected	Words, images, or objects.	Numbers and statistics.
Form of Data Collected	Qualitative data such as open- ended responses, interviews, participant observations, field notes, & reflections.	Quantitative data based on precise measurements using structured & validated data-collection instruments.
Type of Data Analysis	Identify patterns, features, themes.	Identify statistical relationships.
Objectivity and Subjectivity	Subjectivity is expected.	Objectivity is critical.
Role of Researcher	Researcher & their biases may be known to participants in the study, & participant characteristics may be known to the researcher.	Researcher & their biases are not known to participants in the study, & participant characteristics are deliberately hidden from the researcher (double blind studies).
Results	Particular or specialized findings that is less generalizable.	Generalizable findings that can be applied to other populations.
Scientific Method	Exploratory or bottom-up: the researcher generates a new hypothesis and theory from the data collected.	Confirmatory or top-down: the researcher tests the hypothesis and theory with the data.
View of Human Behavior	Dynamic, situational, social, & personal.	Regular & predictable.
Most Common Research Objectives	Explore, discover, & construct.	Describe, explain, & predict.
Focus	Wide-angle lens; examines the breadth & depth of phenomena.	Narrow-angle lens; tests a specific hypotheses.
Nature of Observation	Study behavior in a natural environment.	Study behavior under controlled conditions; isolate causal effects.
Nature of Reality	Multiple realities; subjective.	Single reality; objective.
Final Report	Narrative report with contextual description & direct quotations from research participants.	Statistical report with correlations, comparisons of means, & statistical significance of findings.

Izvor: Internet sajt biblioteke Univerziteta Xavier, Sinsinati, Ohajo, https://www.xavier.edu/library/students/documents/qualitative_quantitative.pdf⁶

⁶ Sadržaj tabele preuzet iz: Johnson, B&Christensen. L.(2008). Educational research: *Quantitative, qualitative, and mixed approaches*, 34, Thousand Oaks, CA: Sage Publications. Lichtman. M. (2006): Qualitative research in education: A users guide, 7-8. Thousand Oaks. CA: Sage Publications.

I drugi autori konstatuju da pristup samo jednom metodom, u slučaju ekonomske diplomatije ne obezbeđuje dovoljno kvalitetan rezultat. U svom radu "Problematicnost diferenciranja kvalitativne i kvantitativne metode istraživanja", prof. dr. Martin Alvud ističe:

"Razlika između kvalitativnih i kvantitativnih pristupa je problematična ne samo zato što je pokrenula problematična i zbunjujuća gledišta o kojima se govori u glavnom delu teksta, već i zato što se može pokazati ograničavajućim za razvoj novih istraživačkih metoda. Na primer, istraživači koji veruju da je dozvoljeno samo razviti nove metode u okviru pretpostavljenih referentnih okvira svakog od kvalitativnih i kvantitativnih pristupa, propustiće mogućnosti za plodonosne kombinacije karakteristika koje pripadaju i jednom i drugom pristupu".

Ova razlika takođe doprinosi stvaranju oštrijeg diskursa o metodologiji istraživanja, jer se metode istraživanja ponekad opisuju jednostavno kao "kvalitativne metode" (ili slično za "kvantitativne metode"). S obzirom na heterogenost u kvalitativnim metodama (i odgovarajućim za kvantitativne metode) takve izjave ne daju konstruktivan doprinos.

Osnovna poruka sadašnje veoma popularne škole "Mešovite metode" jeste da je legitimno mešati kvalitativne i kvantitativne pristupe (uz opasku, "ponekad, ako se to radi na pravi način"), uz pretpostavku da je ipak značajno razlikovati kvalitativne pristupe.

Osim toga, autori koji diskutuju o kombinovanju kvalitativnih i kvantitativnih metoda, za razliku od gore navedenih autora, čini se da takođe prihvataju da su istraživačke filozofije i istraživačke metode snažno povezane. Na primer, Gelo i sar. (2008, str. 274) predložili su različite forme za kombinovanje kvalitativnih i kvantitativnih metoda i primetili su da se "kvantitativni i kvalitativni pristupi razlikuju u metodama koje primenjuju".⁷

Bez obzira na teškoće i probleme prilikom identifikovanja i standardizovanja metoda merenja učinka ekonomske diplomatije, brojna istraživanja usmerena su na dve prethodno pomenute kategorije, kvantitativno i kvalitativno sumiranje i merenje rezultata. Određeni broj zemalja već ima uspostavljeno praćenje i evaluaciju rezultata koji se odnose na efekte ekonomskih diplomata. Međutim, te efekte je teško precizno odrediti jer nije moguće jasno videti razliku učinka ekonomske diplomatije u odnosu na rezultat preduzeća, kompanija ili ekonomskih performansi države, s obzirom da postoji mnogo drugih i posebnih faktora koji utiču na performanse kompanija.

Veoma zapažen rad na temu merenja učinka ekonomske diplomatije i uspostavljanja standarda u ovoj oblasti predstavljen je u izdanju Tehnopolis grupe pod nazivom "Reperi standardizacije", sačinjenom od strane više autora, u kome su razmatrane prakse Danske, Francuske, Nemačke i Velike Britanije. Kompila-

⁷ Allwood C. Martin, (2011): "The distinction between Qualitative and Quantitative research methods is problematic", *Articles in Quality and Quantity*, Published on line, Springer Science + Bussines Media B.V, 14-27.

cija indikatora (repera) učinjena je na bazi sinteze izveštaja dobijenih od konsultanata iz ove četiri zemlje. Njihov zadatak bio je da odgovore na sledeća pitanja:

“1. Da li možete pronaći eksplicitne političke ciljeve ili zadatke za ekonomsku diplomatiju u strateškim dokumentima Ministarstva inostranih poslova ili agencija koje izvršavaju ove politike? Ko je najodgovorniji za ove politike?

2. Ko rukovodi ili izvršava zadatke ekonomske diplomatske službe u vašoj zemlji?

3. Šta je učinjeno u ambasadama kako bi se ispunili ciljevi ekonomske diplomatije? Ovde se traže aktivnosti, proizvodi i usluge kao što su inostrane misije, istraživanje tržišta, korišćenje diplomatija radi smanjenja uvoznih opterećenja, povezivanje, ugovaranje susreta i tako dalje.

4. Da li postoje zvanične ‘smernice’ ili dostupni priručnici, o ovim proizvodima i uslugama? Kako su oni ‘standardizovani’? Kako je definisan kvalitet?

5. Da li se aktivnosti i usluge nadgledaju ili ocenjuju (pojedinačno, ili kao grupa aktivnosti). Ako je tako, molimo vas da navedete izvore i izveštaje, ali takođe i pregled korišćenih indikatora, i, ako su dostupni, izveštaje i vrednovanja rezultata.”⁸

Fokus izveštaja je odgovor na pitanja od 3 do 5. Saradnici su obavljali intervjue sa predstavnicima u njihovom ministarstvu ili agenciji nadležnoj za ekonomski nastup u inostranstvu, kako bi pronašli ključne dokumente i dobili odgovore na pitanja. Koristili su, takođe, veb sajtove ministarstava i pristupali drugoj literaturi na svojim jezicima kao što su teze, disertacije i druga literatura. S obzirom da je postojala potreba da se jasno definiše terminologija, termin Diplomatska Misija upotrebljavan je samo za kancelariju ili prostor koji može formalno da reprezentuje državu u inostranstvu. Ovaj termin uključuje ambasade i konzulate, ali takođe i inovativne centre, ukoliko u takvom centru postoji zaposlen diplomata. Nasuprot toga, Kancelarije za podršku biznisu ili Privredne komore, nisu uključene kada se koristi termin Diplomatske Misije.

⁸ Barnevald V. Joost, et al, ur , (2014): *Benchmark Standardization, Prattice from Denmark, France, Germany and United Kingdom*, Technopolis group, 3.

Tabela 2. Ciljevi ekonomske diplomatije i odgovorni učesnici u Nemačkoj, Danskoj Francuskoj i Velikoj Britaniji.

Country	Major objectives	Management/Policy, execution
DE	Promote domestic economy and state specific economy, promote research collaborations, support enterprises involved in development aid, support for agro-industrial sector	Management/Policy: ministries: Foreign Affairs, Economic Affairs and Energy, Research and Education, Economic Cooperation and Development, Food and Agriculture, State ministries, Chambers of Commerce
		Execution: Chambers of Commerce, Diplomatic Missions, Germany Trade and Invest, German Centres
DK	Assist enterprises in exports, attract foreign investments, improve economic relations and trade policy	Management/Policy: ministries: Foreign Affairs, Business and Growth, Education and Science
		Execution: Trade Council, Invest in Denmark, Diplomatic Missions
FR	Support internationalisation of French companies and enhance development of foreign investments in France	Management/Policy: Ministry of Economic and Financial affairs (DG Trésor), Ministry of Foreign and European Affairs,
		Execution: Ubifrance, l'AFII, international Chambers of Commerce, Diplomatic Missions and French regional and local Authorities, Coface
UK	Promote UK's economic interest abroad and attract foreign investments, slight focus on bilateral interaction	Management/Policy: Foreign and Commonwealth office (FCO), Department for Business Innovation and Skills (BIS)
		Execution: Diplomatic Missions, UK Trade and Invest (UKTI), UK Export Finance

Technopolis

Izvor: Internet sajt Ministarstva spoljnih poslova Holandije

Kao rezultat navedenog istraživanja pokazalo se da svaka država ima eksplisne ciljeve i ciljeve politike za ekonomsku diplomatiju. Svaka od zemalja se, takodje, fokusira na povećanje izvoza i podsticanje stranih investicija. Neke zemlje obraćaju posebnu pažnju na obrazovanje i inovacije. Nemačka i Danska su osnovale predstavništva u inostranstvu za ove specifične oblasti; Nemački centri i Danski centri za inovacije.

Proizašlo je, takodje, da upravljanje i postizanje politike i ciljeva ekonomske diplomatije uvek podrazumeva učešće Ministarstva spoljnih poslova, ali i drugih ministarstava kao što su : Ministarstvo obrazovanja, poslovanja i rasta, ekonomskih pitanja i inovacije. Politiku ek. Diplomacije sprovodi raznovrsan skup agencija i učesnika. Francuska ima najširi skupa aktera, što negativno utiče na vidljivost ekonomskih diplomata za klijente i na upravljanje samom politikom sprovođenja ekonomske diplomatije. Danska i Velika Britanija imaju veoma

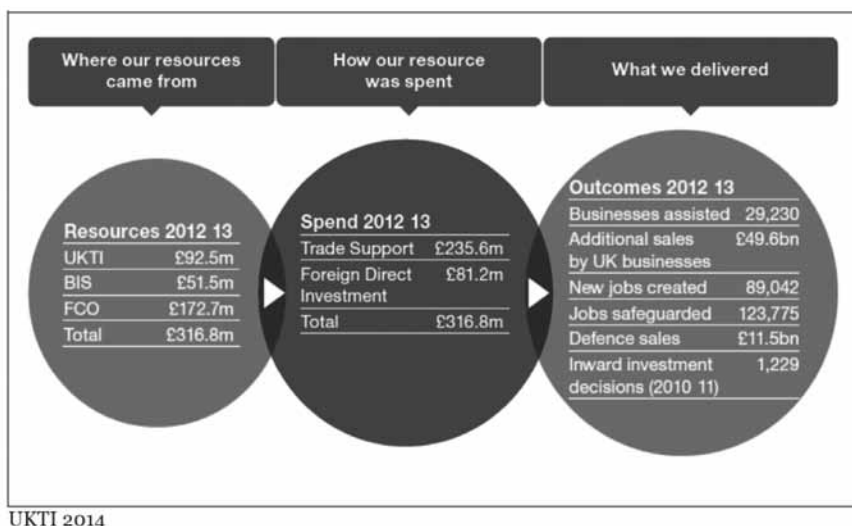
centralizovan pristup sa jednom agencijom koja blisko saradjuje sa ambasadama. Nemačka ima nešto decentralizovaniji pristup zbog svoje federalne prirode.

Interesantno je da sve posmatrane države izvršavaju uporedivi skup usluga. Razlika je u tome ko od učesnika ih izvršava i pod kojim uslovima. Danska i Velika Britanija naplaćuju klijentima naknadu za usluge, ako je to moguće i vrše procenu podobnosti potencijalnih klijenata. Nemačka ekonomska diplomatija uglavnom obavlja svoje aktivnosti preko Nemačke privredne komore, koja se finansira članarinama.

Istraživanje je pokazalo i da Velika Britanija ima najrazvijenija uputstva i priručnike za ekonomsku diplomatiju, takođe je ciljano usmerena na spoljne klijente (preduzetnike). Nemačka takođe ima standardizovani pregled proizvoda, ali za unutrašnje potrebe koji nije dostupan javnosti. Danska je odlučila da ne napravi elaborat kataloga proizvoda i usluga - iako postoje detaljni opisi nekoliko aktivnosti, umesto toga, klijenti su napravili prilagođenu ponudu zasnovanu na unapred definisanom setu pitanja vezanih za preduzeća. Kada je o Francuskoj reč, nije ustanovljeno postojanje posebnih uputstava ili priručnika.

Najopsežniji monitoring i evaluacija rezultata ekonomske diplomatije vrši se u Danskoj i Velikoj Britaniji. U ovim zemljama anketa korisnika usluga upotrebljava se u kombinaciji sa različitim kontrolnim okvirima troškova i utroškom vremena. Ove dve zemlje takođe koriste opšte statističke pokazatelje kako bi usmerili performanse svojih agencija, što čini i većina drugih zemalja. Posebna metoda osiguranja kvaliteta koristi se u Nemačkoj sertifikovanjem agencija koje učestvuju u ovim poslovima (Nemačka Privredna komora).

Slika 1. *Primer procesa evaluacije i uspostavljenih indikatora u Agenciji za trgovinu i investicije Velike Britanije.*



Izvor: UKTI – Agencija za trgovinu i investicije Velike Britanije

Konkretni zaključci, koji se mogu doneti na osnovu prethodno iznetog istraživanja, jesu da je u poslove ekonomske diplomatije uvek uključeno Ministarstvo spoljnih poslova i, u većini slučajeva, Ministarstvo za ekonomske poslove. Zemlje koje pridaju posebnu pažnju biznisu, inovacijama i nauci, imaju angažovana i ministarstva zadužena za te oblasti.

Pokazalo se da jedan ministar ili ministarstvo nikada sami ne izvršavaju poslove ekonomske diplomacije. Uobičajeno je da se osnivaju posebne agencije za obavljanje ovih zadataka.

Rezultati su pokazali da nije puno zemalja standardizovalo svoje prakse. Razlozi za to su ili rašireni broj učesnika, ili namerni izbor da se savetnicima (ek. diplomatama) da podsticaj i omogućiti da svoj posao rade na način koji je po njima najadekvatniji.

Najblizi standardizaciji, za većinu zemalja, su jasno određeni zadaci i odgovornosti za aktere prisutne na terenu. Davanjem svakom učesniku skup jasnih odgovornosti može se pomoći u standardizaciji prakse u okviru organizacije koja je odgovorna za njih.

Jasna korelacija je da zemlje koje imaju jednog učesnika odgovornog za ekonomsku diplomatiju, Velika Britanija i Danska, imaju i najopsežniji okvir za praćenje učinka. Ovo može biti povezano sa činjenicom da klijenti plaćaju za ove usluge i da zahtevaju određeni nivo kvaliteta za svoje troškove. Zemlje u kojima je prisutan najšire disperzivan skup učesnika, imaju najmanje opremljen okvir za praćenje i najmanji stepen standardizacije.

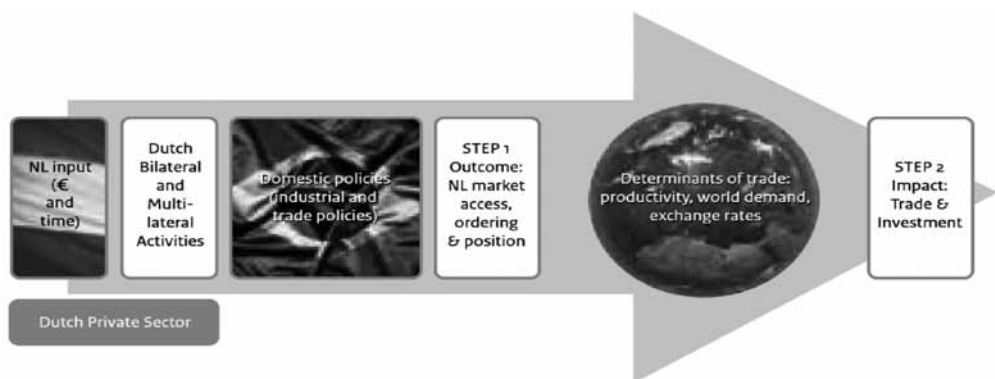
Potpore tezi autora teksta da je u vrednovanju učinka ekonomske diplomatije najadekvatnije ostvariti sintezu između kvalitativnog i kvantitativnog vrednovanja, daje istraživanje Ministarstva spoljnih poslova Holandije. U publikaciji pod nazivom „Ekonomska diplomatija u praksi, evaluacija ekonomske diplomatije Holandije u Latinskoj Americi”, navodi se da je prilikom istraživanja korišćena mešovita metoda primenom kvalitativne i kvantitativne evaluacije. Ovo je podrazumevalo kvalitativnu studiju kako bi se procenio uticaj ekonomske diplomatije na konkurentsku poziciju holandskih kompanija, kao i kvantitativnu analizu uticaja ekonomske diplomatije na obim holandskog izvoza u Latinsku Ameriku (uticaj promocije trgovine na izvoz robe). U navedenoj publikaciji navodi se:

„Primenjeni evaluacioni princip - mešovita metoda u oceni učinka ekonomske diplomatije Holandije u Latinskoj Americi odvijala se u dve faze:

1. Ocena na nivou krajnjeg rezultata: Odnosi se na kvalitativnu studiju pristaništa, morskog transporta i sektora logistike u Brazilu kako bi se ocenio efekat ekonomske diplomatije na konkurentnost holandskih kompanija u ovom sektoru (rezultati u terminima pristupa tržištu i pozicioniranju).
2. Ocena na nivou upliva (uticaja). Odnosi se na kvantitativnu analizu efekata ekonomske diplomatije na obim holandskog izvoza u Latinsku Ameriku (uticaj trgovinske promocije na izvoz roba).“

Ovo kombinovanje kvalitativne i kvantitativne metode jedinstveno je u istraživanju ekonomske diplomatije. Kvantitativno proučavanje oslanja se na ekonometrijsku metodu za utvrđivanje do kog stepena je obim holandskog izvoza u Latinsku Ameriku rezultat ekonomske diplomatije, kroz kontrolu drugih parametara trgovine. Kvalitativna studija slučaja otvara pitanje inherentno kvantitativnoj statističkoj analizi (Da li to funkcioniše?) i obezbeđuje uvid u način na koji agregatni uticaj ekonomske diplomatije može biti generisan (Kako to funkcioniše?). Glavno ograničenje ovog dualnog pristupa je da još uvek ne obraća dovoljno pažnje na troškove ekonomske diplomatije i da li, ili ne, oni prevazilaze korist.”⁹

Slika 2. Rezultat i uticaj ekonomske diplomatije Holandije



Izvor: Ministarstvo spoljnih poslova Holandije

U Republici Srbiji, jedno od istraživanja na temu učinka i delovanja ekonomske diplomatije, obavljeno je od strane CIVIS-a, (Association of Non-governmental organizations of Southeast Europe), Asocijacije nevladinih organizacija Jugoslovene evrope, 2012. godine. Ovo istraživanje objavljeno je u knjizi „Nova ekonomska diplomatija – mogućnosti i izazovi“, 2012. Godine, u kojoj su sakupljena iskustva ekonomskih diplomata Republike Srbije iz pojedinih zemalja. Ove diplomate bile su upućene u inostranstvo prema modelu ekonomske diplomatije tadašnjeg Ministarstva ekonomije i regionalnog razvoja kako bi, u sklopu ambasade u zemlji prijema, radile na unapređenju ekonomske razmene, plasmanu proizvoda, privlačenju stranih investicija i sveukupnom jačanju uzajamnih ekonomskih odnosa.

Ova publikacija imala je promociju u više gradova u Srbiji (Beograd, Novi Sad, Niš, Novi Pazar). Predstavljanje javnosti doprinelo je upoznavanju šireg

⁹ Ministry of Foreign Affairs of the Netherlands, (2013): Economic diplomacy in practice, An evaluation of Dutch economic diplomacy in Latin America, *Policy and Operations Evaluation Department* (IOB), no. 385, Den Hague, 18-22.

auditorijuma sa ekonomskom diplomatijom i ukazalo na značaj razvoja praktičnog i teorijskog aspekta ove naučne discipline.

U knjizi su data iskustva ekonomskih savetnika u zemljama u kojima su raspoređeni. Milomir Ognjanović, ekonomski savetnik u Generalnom konzulatu RS u Čikagu, SAD, iznosi sledeće:

„Za sve proizvode i usluge, čak i one „besplatne“, neko je uložio svoj rad, neko je uvek platio za stvaranje nečeg što se smatra „besplatnim“. Samo uz uloženi trud i energiju, timsku igu, uzajamnu podršku, efikasnu komunikaciju i koordinaciju, možemo očekivati uspeh i boljitak. Ove zakonitosti vidimo svakog dana i na sportskim terenima i one su osnove tržišne ekonomije na kojem se zasniva i biznis i današnji ekonomski međunarodni odnosi. Izloženi oštroj globalnoj konkurenciji i interesima, **građenje partnerskih i poslovnih odnosa postaje imperativ za sticanje poverenja i širenje poslovnih veza i nacionalnih ekonomskih interesa**. Izgradnja partnerskog odnosa, promocija domaće ekonomije, privlačenje stranih direktnih investicija i plasman domaće robe u inostranstvo iziskuje veliki trud i veštinu“.¹⁰

Navedeno ukazuje na jedan od segmenata obuhvaćenih ovim radom, na kvalitativnu komponentu, koja je veoma bitna za stvaranje poslovnog ambijenta radi ostvarivanja uspeha. Iako je mreža ekonomskih savetnika, uspostavljena od strane MEER-a, rasformirana tokom 2016. godine, kada je i poslednji ekonomski diplomata vraćen u zemlju¹¹, iskustva ovog pokušaja mogu biti dragocena u narednom periodu.

4. Zaključak

Razmatranjem prakse više zemalja, kao i iskustva Republike Srbije, kombinovanje metoda kvalitativne i kvalitativne analize rada i vrednovanja učinka ekonomskih diplomata, u postojećim okolnostima neizostavnog delovanja subjektivnog faktora u ekonomskom nastupu, najcelishodniji je pristup ocenjivanja postignutog u ovoj oblasti. Pažljiv i odmeren pristup prilikom davanja ocena učinka, potkrepljen kako konkretnim statističkim podacima, tako i objektivno procenjenim mogućnostima postizanja boljih rezultata, doprineće boljem razumevanju ove problematike i jačanju preko potrebne sinergije i društvenog konsensusa za ulaganje potrebne energije i resursa u ovoj oblasti.

¹⁰ CIVIS (2012), Association of Non-Governmental organizations of Southeast Europe: *Nova ekonomska diplomatija – mogućnosti i izazovi*, Čigoja, Beograd, 103

¹¹ Ministarstvo trgovine, turizma i telekomunikacija, u čiju nadležnost je prešla oblast ekonomske diplomatije, 2014. godine, nakon formiranja ovog ministarstva, smatralo je da je mreža ekonomskih diplomata neracionalna i nefunkcionalna, što je rezultiralo postepenim gašenjem ove mreže. Tokom 2016. godine ona je prestala da postoji povlačenjem preostalih ekonomskih diplomata.

U tom cilju, ekonomski atašei Belgije šestomesečno izrađuju statistički izveštaj o poslovanju između države u kojoj posluju i Belgije, koji dostavljaju organu (Agenciji) pod čijom su ingerencijom. Ovaj dokument objavljuje se na internetu i dostupan je široj javnosti na uvid. Pomenuti izveštaji ne prikazuju direktan učinak ekonomskog atašea, jer se i privatni belgijski sektor direktno povezuje sa odgovarajućim partnerima u inostranstvu, ali svakako ukazuju na ukupnost uspešnosti nastupa u državi u kojoj ekonomski diplomata obavlja svoju dužnost, što u krajnjem i jeste projektovani cilj zajedničkog nastupa. Ovaj primer mogao bi biti pokazatelj za uspostavljanje modela ekonomske diplomatije i načina izveštavanja u ovoj oblasti.

Kvantitativna komponenta, za razliku od kvalitativne, kako je već rečeno, konkretnim brojkama izražava doprinos ekonomskih diplomata u izvršavanju poslovnih obaveza i prikazuje kretanje ekonomskih pokazatelja između Republike Srbije i odnosne zemlje (uvoz, izvoz, investicije itd). Međutim, u postojećem pristupu nastupa ekonomske diplomatije u inostranstvu, i odsustvu adekvatnog sistemskog modela, izostao je i metod za vrednovanje rada savetnika za ekonomske poslove (ekonomskih diplomata). Ocena da je mreža ekonomskih diplomata, uspostavljena u toku 2009. i 2010. godine od strane MEER nefunkcionalna, i da troši više nego što doprinosi, poslužila je za njeno postepeno ukidanje, da bi 2016. godine i poslednji ekonomski diplomata bio vraćen u zemlju. Pri tome, izostali su statistički podaci i relevantni načini merenja učinka.

Ukupnost pozitivnih ekonomskih rezultata i dobrih ekonomskih performansi države ne oslobađa odgovornosti mrežu ekonomskih diplomata, na kolektivnom i pojedinačnom nivou. Međutim, pozitivni rezultati svakako daju mogućnost da se izbegnu iznuđeni i ishitreni potezi. O merama i koracima koje eventualno treba preduzimati prema pojedincima, ili sveukupno, u cilju poboljšanja rezultata, daleko je svrsishodnije i racionalnije razmišljati u mirnoj i stabilnoj situaciji, koju sveukupnost dobrih rezultata obezbeđuje. Jedan od načina da se to postigne, kako i naučna literatura potvrđuje, predstavlja uspostavljanje adekvatnog modela ekonomske diplomatije, kao i njenog veoma važnog dela, sistemskog praćenja i merenja rezultata, zasnovanog na mešovitoj metodi kvalitativnog i kvantitativnog ocenjivanja rezultata ekonomskih diplomata, upodobljenog našoj realnosti.

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THE RELATIONSHIP BETWEEN QUALITATIVE AND QUANTITATIVE EVALUATION OF THE EFFECTS OF ECONOMIC DIPLOMACY

The question that arises during the process of determination and application of the selected model of economic diplomacy is very common and well known - in what way, in most of the situations, objectively measure and evaluate the effect of the work of economic diplomacy? Although the performance evaluation system should be anticipated and designed along with the beginning of the implementation of the selected model, very often this is not the case. It is very important to specify in advance system performance evaluation in order to make known applied parameters when assessing achieved results. The lack of precision of these parameters, at a later stage, during the monitoring of the work of economic diplomacy, is no small difficulty. The reasons for the absence of clear assessment criteria are multiple and primarily related to the difficulty of efficient combination and a clear overview of the relationship between the qualitative and quantitative component of the results of the work of the economic diplomats. However, in spite of the fact that this type of research has not, until now, brought the exact model of precise determination of the performance of economic diplomats, the efforts at designing, at an early stage of establishing the model, the methods of measuring the effects are one of the bases for stable and consistent application of the selected model.

Keywords: economic diplomacy, model, evaluation, qualitative and quantitative measurement

RAZVOJ TURISTIČKE PRIVREDE REPUBLIKE SRBIJE U PERIODU 2008 - 2017 GODINE

Ekonomije mnogih zemalja sveta baziraju se na turizmu čiji se značaj posebno ogleda u umnožavanju efekata privrednih tokova. Turizam vrši uticaj bilo direktan ili indirektan na Bruto domaći proizvod (BDP), na platni bilans, na zaposlenost, na investicionu aktivnost, itd.

Analiza je vršena kroz sagledavanje investicija u turizam, broja preduzeća, broja zaposlenih lica i prosečnim zaradama u ovoj oblasti, broja dolazaka turista u Republiku Srbiju, noćenja turista po vrstama turističkih mesta, ostvaren devizni priliv i odliv od turizma po zemljama i međunarodna poređenja Republike Srbije sa zemljama iz okruženja i nekim zemljama članicama EU u broju dolazaka stranih turista. U analizi su, pored podataka iz istraživanja koja se sprovode u Republičkom zavodu za statistiku Srbije, korišćeni i podaci Narodne banke Srbije i Ministarstva trgovine, turizma i telekomunikacija.

Ključne reči: turistička delatnost, dolasci, noćenja, devizni priliv, Republika Srbija

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1. Uvod

Predmet istraživanja ovog rada je razvoj turističke privrede Republike Srbije u periodu od 2008-2017. godine. Cilj istraživanja je da se na osnovu analize turističke delatnosti u posmatranom periodu ukaže na potrebu poboljšanja kvaliteta turističke ponude jer turizam predstavlja razvojnu šansu Republike Srbije.

Reč "turizam" potiče od engleske reči "tour" koja znači put, kružno putovanje, obilaženje itd. Prilikom definisanja pojma turizma treba napomenuti da se putovanja obavljaju iz zadovoljstva, sa zadržavanjem u različitim mestima, a osobe koje preuzimaju takva putovanja nazivaju se turisti.

U statističkom smislu putnik¹ je svako lice na putovanju između dve ili više zemalja ili dva ili više lokaliteta u granicama zemlje njegovog uobičajenog prebivališta. Putnici koji učestvuju u turizmu definišu se kao posetioci.

Posetilac je svako lice koje putuje u neko mesto izvan svoje uobičajene okoline za period kraći od godinu dana, a glavni razlog posete nije obavljanje neke aktivnosti plaćene od mesta posete.

Turista je posetilac koji provede najmanje jednu noć u nekom ugostiteljskom objektu kolektivnog ili individualnog smeštaja u mestu posete radi odmora ili rekreacije, zdravlja, studija, sporta, religije, porodice, poslova, raznih javnih skupova i misija. Obuhvataju se odrasla lica i deca bez obzira na uzrast i bez obzira da li zauzimaju poseban ležaj ili ne.

Domaći turista je svako lice koje provede najmanje jednu noć u nekom ugostiteljskom objektu za smeštaj, a državljanin je Republike Srbije.

Strani turista je svako lice koje provede najmanje jednu noć u nekom ugostiteljskom objektu za smeštaj u Republici Srbiji a nije državljanin Republike Srbije.

2. Turizam kao privredna delatnost

Ako posmatramo turizam, kao privrednu delatnost, treba navesti njegove karakteristike na osnovu kojih se on razlikuje od ostalih delatnosti privrede. To su: heterogenost strukture turizma, elastičnost turističke tražnje i neelastičnost turističke ponude, sezonski karakter turizma i neproizvodni karakter rada u turizmu.

Turizam je heterogena privredna delatnost koja se sastoji od različitih privrednih i neprivrednih aktivnosti, koje zajedno učestvuju u podmirivanju potreba domaćih i stranih turista. Osnovu turističkih privrednih aktivnosti čine: ugostiteljstvo i hotelijerstvo, saobraćaj, turističke i putničke agencije, trgovina na malo, zanatstvo i razne vrste komunalnih delatnosti. Neprivredne

¹ Statističko istraživanje o dolascima i noćenjima turista – metodološko uputstvo, RZS.

aktivnosti čine: kulturno-umetničke, sportske i druge aktivnosti, kao i rad raznih turističkih organizacija.

3. Investicije u sektor Usluge smeštaja i ishrane

U periodu 2008-2016. godine prosečno učešće turizma u ostvarenim investicijama iznosilo je 0,8% (Tabela 1). Vrednost investicija u turizam u Republici Srbiji u 2015. godini, iznosila je 3.995,6 mil. RSD, što je za 26,0% manje u odnosu na vrednost investicija u 2014. godini. Vrednost investicija u turizam u Republici Srbiji u 2016. godini iznosila je 3.477,2 mil. RSD, što je za 13,0% manje u odnosu na vrednost investicija u 2015. godini.

Tabela 1. Vrednost investicija u sektoru Usluge smeštaja i ishrane
(po KD iz 2010.) u Republici Srbiji, 2008.-2016. godine (mil. RSD)

2008.	2010.	2012.	2014.	2015.	2016.
Ukupne ostvarene investicije u osnovne fondove (mil. RSD)					
582514,8	483646,3	670802,3	535986,2	564849,3	601619,8
Vrednost investicija u turizam (mil. RSD)					
4965,4	3658,9	7360,6	5402,6	3995,6	3477,2
Učešće turizma u ukupno ostvarenim investicijama (%)					
0,8	0,7	1,1	1,0	0,7	0,6

Izvor: Republički zavod za statistiku Republike Srbije, Statistički godišnjaci
za odgovarajuće godine

4. Broj preduzeća u sektoru Usluge smeštaja i ishrane

Kriterijumi za podelu preduzeća na mala, srednja i velika, utvrđeni Zakonom o računovodstvu i reviziji², odnose se na prosečan broj zaposlenih, visinu godišnjeg prihoda i vrednost imovine utvrđene na dan sastavljanja finansijskih izveštaja u poslovnoj godini.

Mala preduzeća su ona kod kojih broj zaposlenih nije veći od 50, godišnji prihod ne prelazi 25.000.00 evra, a prosečna vrednost poslovne imovine nije veća od 10.000.00 evra.

U srednja preduzeća razvrstavaju se ona kod kojih je prosečan broj zaposlenih u godini za koju se podnosi godišnji izveštaj od 50 do 250; gde je godišnji prihod od 2.500.000 evra do 10.000.000 evra u dinarskoj protivvrednosti; gde je

² „Službeni glasnik RS“, br.46/06 i 111/09.

prosečna vrednost poslovne imovine (na početku i na kraju poslovne godine) od 1.000.000 evra do 5.000.000 evra u dinarskoj protivvrednosti.

Velika preduzeća su ona koja zapošljavaju više od 250 zaposlenih, ostvaruju godišnji prihod veći od 10.000.000 evra i kod kojih vrednost imovine prelazi 5.000.000 evra.

Tabela 2. Broj preduzeća prema veličini u sektoru Usluge smeštaja i ishrane u Republici Srbiji, 2008.-2016. godine

	2008.	2010.	2012.	2014.	2015.	2016.
Ukupno	89198	90364	91536	93150	92329	97023
Broj preduzeća u sektoru Usluge smeštaja i ishrane						
Ukupno	1887	2249	2597	3021	3106	3428
Mikro	1464	1834	2173	2609	2647	2897
Mala	324	333	348	340	395	470
Srednja	90	74	72	68	59	56
Velika	9	8	4	4	5	5

Izvor: Republički zavod za statistiku Republike Srbije, Radni dokumenti „Preduzeća u Republici Srbiji, prema veličini“, za odgovarajuće godine

U ukupnom broju preduzeća sektor Usluge smeštaja i ishrane u Republici Srbiji u periodu od 2008-2016. godine učestvuje u proseku sa 2,9% (od 2,1% u 2008. godini do 3,5% u 2016. godini, Tabela 2). Najveći deo preduzeća u sektoru turizma formiran je u preduzećima mikro veličine (2897 preduzeća u 2016. godini, sa učešćem od 84,5%). Kod malih preduzeća sektor turizma u 2016. godini učestvuje sa 13,7% (470 preduzeća). U okviru grupacije srednjih preduzeća u sektoru turizma formirano je u 2016. godini 56 (1,6%). Velikih preduzeća u sektoru turizma bilo je u 2016. godini 5 (0,1%).

Broj formiranih preduzeća u sektoru turizma u Republici Srbiji, u 2016. godini (3428) u odnosu na početnu posmatranu godinu (1887, 2008. godina), povećan je za 81,7%, a u odnosu na prethodnu (2015. godina, 3106 preduzeća) za 10,4%.

5. Broj zaposlenih lica

Ako se posmatra broj zaposlenih u turizmu na nivou Republike Srbije u periodu 2008-2016. godine zapaža se da se taj broj smanjivao do 2014. godine, a nakon toga počinje da raste (Tabela 3). Najveći pad broja zaposlenih zabeležen je u 2010. godini (u odnosu na prethodnu 2009. godinu došlo je do smanjenja od 12,9%). U 2016. godini broj zaposlenih je povećan za 3,9% u odnosu na 2015. godinu.

Tabela 3. Broj zaposlenih lica u sektoru Usluge smeštaja i ishrane u Republici Srbiji, 2008.-2016. godine

	Ukupan broj zaposlenih	Broj zaposlenih u sektoru (Usluge smeštaja i ishrane)	%
2008.	2081676	67715	3,2
2009.	1984740	64142	3,2
2010.	1901198	55862	2,9
2011.	1866170	54008	2,9
2012.	1865614	54701	2,9
2013.	1864783	55308	3,0
2014.	1845494	54772	3,0
2015.	1989617	65363	3,3
2016.	2009785	67902	3,4

Izvor: Republički zavod za statistiku Republike Srbije,
Statistički godišnjaci za odgovarajuće godine

6. Zaposleni i zarade u sektoru Usluge smeštaja i ishrane

U strukturi broja zaposlenih u sektoru Usluge smeštaja i ishrane (septembar 2017. godine) dominiraju zaposleni sa srednjom stručnom spremom (6017 lica odnosno 45,3%), i kvalifikovani radnici (2318 lica odnosno 17,4%).

Učešće zaposlenih sa visokom stručnom spremom iznosi 10,7%, polukvalifikovanih 8,9%, sa nižom stručnom spremom 4,4%, nekvalifikovane radne snage 5,1%, sa višom stručnom spremom 5,0% i visokokvalifikovanih 3,2% (Tabela 4).

Tabela 4. Broj zaposlenih i prosečne zarade prema stepenu stručne spreme u sektoru Usluge smeštaja i ishrane u Republici Srbiji (septembar 2017.)

	Zaposleni %	Zarada (RSD)
UKUPNO	100,0	52184
Visoka	10,7	86666
Viša	5,0	71977
Srednja	45,3	47721
Niža	4,4	38997
Visokokvalifikovani	3,2	68794
Kvalifikovani	17,4	46894
Polukvalifikovani	8,9	39918
Nekvalifikovani	5,1	40710

Izvor: Republički zavod za statistiku Republike Srbije, Saopštenje “Zaposleni kod pravnih lica u Republici Srbiji prema visini zarade i stepenu stručne spreme“

Iz prezentovanih podataka uočava se da je prosečna zarada isplaćena u septembru 2017. godine u sektoru turizma u Republici Srbiji iznosila 52184 dinara. Posmatrano prema stepenu stručne spreme, najviše zarade imaju zaposleni sa visokom stručnom spremom (njihova prosečna zarada u septembru 2017. godine u Republici Srbiji iznosila je 86666 dinara i bila je veća od zarade zaposlenih sa nižom stručnom spremom oko 2 puta).

Visokokvalifikovana radna snaga imala je zarade koje su 1,7 puta veće od zarada nekvalifikovanih (Tabela 4).

7. Dolasci i noćenja turista³

Tabela 5 pokazuje da je Republiku Srbiju tokom 2017. godine posetilo 3085866 turista koji su ostvarili 8325144 miliona noćenja. Evidentirano je 1588693 domaćih turista (51,5% od ukupnog broja gostiju) a inostranih 1497173 (48,5% ukupnog broja gostiju). U 2017. godini broj stranih turista je povećan za 16,8% a broj domaćih za 7,9% u odnosu na 2016. godinu.

U 2017. godini domaći turisti su ostvarili 5150017 noćenja (61,9% ukupnog broja ostvarenih noćenja) a strani 3175127 (38,1% ukupnog broja ostvarenih noćenja) odnosno zapaža se rast noćenja domaćih turista od 7,4% u odnosu na 2016. Godinu, dok je broj noćenja stranih turista veći za 15,9%.

³ Turista se registruje u svakom mestu ili objektu u kojem boravi. Zbog toga u slučaju promene mesta ili objekta dolazi do njegovog ponovnog evidentiranja i do dupliranja podataka. Na osnovu toga statistika evidentira broj dolazaka turista, a ne broj turista.

Tabela 5. Dolasci i noćenja turista u Republici Srbiji, 2008.-2017. godine

	2008.	2012.	2016.	2017.
Dolasci turista				
Domaći	1619672	1269676	1472165	1588693
Strani	646494	809967	1281426	1497173
Prosečna dužinaboravka	3,2	3,1	2,7	...
Noćenja turista				
Domaći	5935219	4688485	4794741	5150017
Strani	1398887	1796217	2738998	3175127

Izvor: Republički zavod za statistiku Republike Srbije, Statistički godišnjaci za odgovarajuće god.

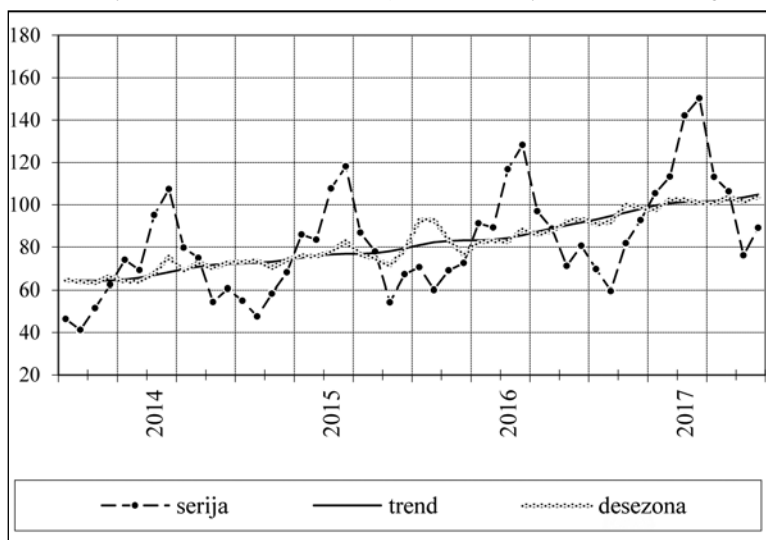
Ako se turistička aktivnost, merena brojem noćenja stranih turista posmatra po kvartalima, zapaža se da je u 1. kvartalu 2017. godine u odnosu na 1 kvartal 2016. godine veća za 5,9%. U 2. kvartalu 2017. godine u odnosu na 2 kvartal 2016. godine veća je za 23,0%. U 3. i 4. kvartalu 2017. godine u odnosu na iste kvartale prethodne godine, zapaža se povećanje turističke aktivnosti od 18,6% odnosno 13,0%.

Kao što je prikazano u *Tabelama 5 i 6* i *Grafikonu 1* zapaža se da se broj noćenja stranih turista povećava iz godine u godinu.

Tabela 6. Indeksi noćenja stranih turista u Republici Srbiji, Ø 2017=100

	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII
2015	55,0	47,6	58,3	68,1	85,9	83,6	107,7	118,1	86,9	77,9	54,3	67,3
2016	70,5	60,0	69,0	72,5	91,3	89,3	116,8	128,2	97,0	88,7	71,2	80,6
2017	69,6	59,6	81,9	92,8	105,4	113,3	142,2	150,3	113,1	106,4	76,2	89,1

Izvor: Republički zavod za statistiku Republike Srbije, Trendovi 2017 godine

Grafikon 1. Noćenje stranih turista u Republici Srbiji, 2014.-2017. godine

Izvor: Republički zavod za statistiku Republike Srbije, Trendovi 2017 godine

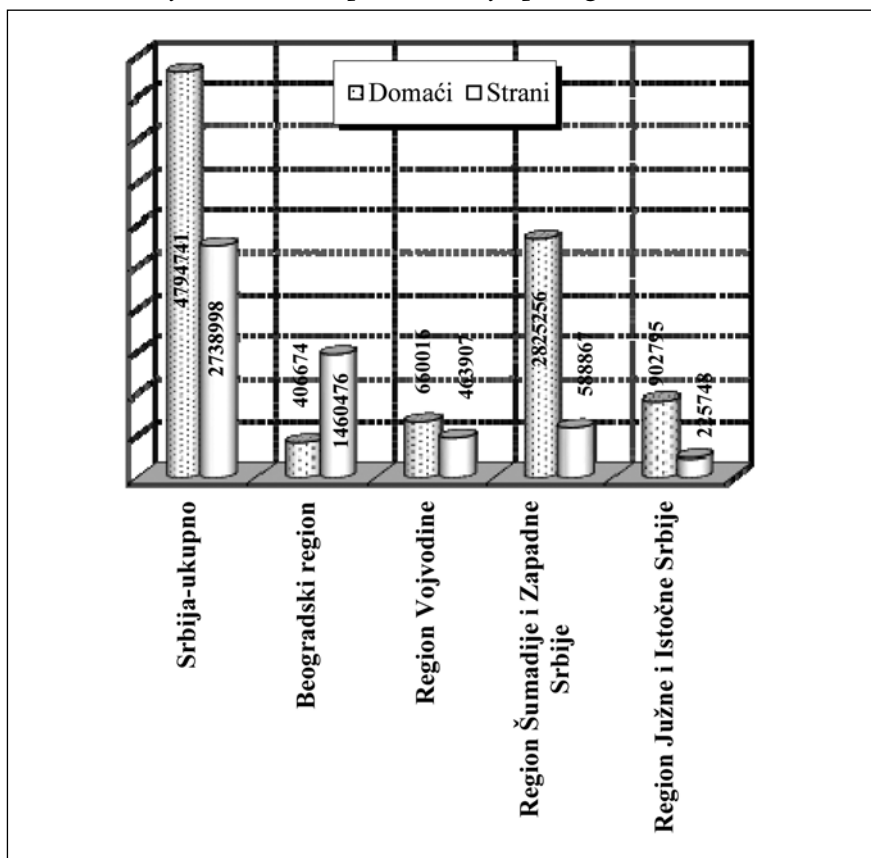
8. Teritorijalni raspored

Posmatrajući teritorijalni raspored noćenja turista, zapaža se velika neujednačenost u Republici Srbiji. Kao što se vidi u Tabeli 7, Region Šumadije i Zapadne Srbije učestvuje u ukupnom broju noćenja sa 45,3% (domaćih 58,9% a stranih 21,5%). Beogradski region učestvuje u ukupnom broju noćenja sa 24,8% (domaćih 8,5% a stranih 53,3%). Region Južne i Istočne Srbije apsorbuje 15,0% ukupnog broja noćenja (od toga domaćih 18,8% a stranih 8,2%). Region Vojvodine apsorbuje 14,9% ukupnog broja noćenja (od toga domaćih 13,8%, a stranih 16,9, Grafikon 2).

Tabela 7. Noćenja turista u Republici Srbiji, po regionima (2016.)

	Ukupno	Domaći	Strani
REPUBLIKA SRBIJA	7533739	4794741	2738998
SRBIJA – SEVER	2991073	1066690	1924383
Beogradski region	1867150	406674	1460476
Beogradska oblast	1867150	406674	1460476
Region Vojvodine	1123923	660016	463907
Zapadnobačka oblast	75584	62184	13400
Južnobačka oblast	87244	69449	17795
Južnobačka oblast	423513	157725	265788
Severnobačka oblast	107871	89814	18057
Severnobačka oblast	158177	92518	65659
Srednjobačka oblast	75085	49142	25943
Sremska oblast	196449	139184	57265
SRBIJA – JUG	4542666	3728051	814615
Region Šumadije i Zapadne Srbije	3414123	2825256	588867
Zlatiborska oblast	1059627	886836	172791
Kolubarska oblast	222882	212761	10121
Mačvanska oblast	215046	169525	45521
Moravička oblast	302832	242233	60599
Pomoravska oblast	33588	20698	12890
Rasinska oblast	192325	164993	27332
Raška oblast	1201407	1001869	199538
Šumadijska oblast	186416	126341	60075
Region Južne i Istočne Srbije	1128543	902795	225748
Borska oblast	144864	115052	29812
Braničevska oblast	109520	94793	14727
Zaječarska oblast	327055	295919	31136
Jablanička oblast	75550	59852	15698
Nišavska oblast	177951	95209	82742
Pirotska oblast	31457	15069	16388
Podunavska oblast	18605	8961	9644
Pčinjska oblast	77282	64438	12844
Toplička oblast	166259	153502	12757
Region Kosovo i Metohija	...	...	...

Izvor: Republički zavod za statistiku Republike Srbije, Opštine i regioni u Republici Srbiji 2017.

Grafikon 2. Noćenje turista u Republici Srbiji, po regionima

Izvor: Republički zavod za statistiku Republike Srbije, Opštine i regioni u Republici Srbiji 2017.

9. Noćenje turista po zemljama porekla

Ako se posmatra struktura inostranih gostiju, najveći broj noćenja tokom 2016. godine ostvarili su turisti iz Bosne i Hercegovine (222888 noćenja što je za 16% više u odnosu na prethodnu godinu). Potom slede turisti iz Crne Gore (195970 noćenja); Bugarske (146196 noćenja); turisti iz Hrvatske (141783 noćenja); Turska sa 141608 noćenja itd (Tabela 8).

Tabela 8. Noćenja turista po zemljama porekla

	2014.	2015.	2016.
Ukupno	6086275	6651852	7533739
Domaći turisti	3925221	4242172	4794741
Strani turisti	2161054	2409680	2738998
- Austrija	47004	52141	59100
- Australija	24475	27730	28569
- Belgija	15797	15397	18096
- Bosna i Hercegovina	163695	192176	222888
- Brazil	...	4821	5684
- Bugarska	88953	119937	146196
- Kanada	15509	19756	18386
- Švajcarska i Lihtenštajn	40140	46644	52951
- Češka Republika	24365	22437	25374
- Nemačka	114997	122590	128897
- Danska	16365	14155	17448
- Španija	18974	21887	25584
- Finska	8719	9117	8414
- Francuska	53053	56570	57158
- Velika Britanija	56238	59660	65216
- Grčka	76600	80370	122062
- Hrvatska	116921	121381	141783
- Mađarska	41533	47436	63271
- Irska	6678	5805	8322
- Izrael	19502	21823	21823
- Island	1621	1503	1965
- Italija	103573	103509	109965
- Japan	13201	12344	12344
- Južna Koreja	...	13890	13890
- Kina	30749	32779	32779
- Kipar	...	8311	18160
- Luksemburg	971	808	1259
- Crna Gora	137084	171234	195970
- Makedonija	77328	85053	107371
- Holandija	32865	33549	36608
- Norveška	16741	17166	17048
- Novi Zeland	2229	2823	3184
- Ostale evropske zemlje	81908	64851	54026

- Ostale vanevropske zemlje	116908	134257	4949960
- Poljska	63506	65338	58670
- Portugalija	6869	7193	8139
- Rumunija	76982	94571	114921
- Ruska federacija	153811	129110	131323
- Švedska	35588	41251	46373
- Slovenija	112237	115449	131827
- Slovačka	16511	20957	21989
- Turska	81710	115038	141608
- Ukrajina	...	14749	18136
- Sjedinjene Američke Države	49144	52114	69002

Izvor: Republički zavod za statistiku Republike Srbije, Statistički godišnjak Srbije 2017.

Tabela 9. Noćenja turista u Republici Srbiji, po vrstama turističkih mesta (januar-decembar 2016. godine)

	Ukupno	Domaći	Strani
Republika Srbija	7533739	4794741	2738998
Beograd	1703340	285207	1418133
NoviSad	330847	103014	227833
Banjska mesta	2085044	1831205	253839
Planinska mesta	1928533	1641427	287106
Ostala turistička mesta ⁴	1216312	763017	453295
Ostala mesta	269663	170871	98792

Izvor: Republički zavod za statistiku Republike Srbije, Saopštenje o turističkom prometu u Republici Srbiji 2016.

Na osnovu broja ostvarenih noćenja, banjska mesta su imala najveći promet sa učešćem od 27,7% u ukupnom broju noćenja u Republici Srbiji (Tabela 9). Po broju ostvarenih noćenja (677690) Vrnjačka banja je najposećenija među banjskim mestima, a među planinskim, to je Zlatibor sa 651798 noćenja. Ako se posmatraju domaći turisti, zapaža se da su najviše boravili u banjskim mestima (38,2%), zatim slede planinska mesta (34,2%), ostala turistička mesta (15,9%) itd. Strani turisti najviše su boravili u Beogradu (51,8%), zatim slede ostala turistička mesta (16,5%), planinska mesta (10,5%), banjska mesta (9,3%) itd.

⁴ Ostala turistička mesta: Niš, Kragujevac, Subotica

10. Devizni priliv i odliv od turizma

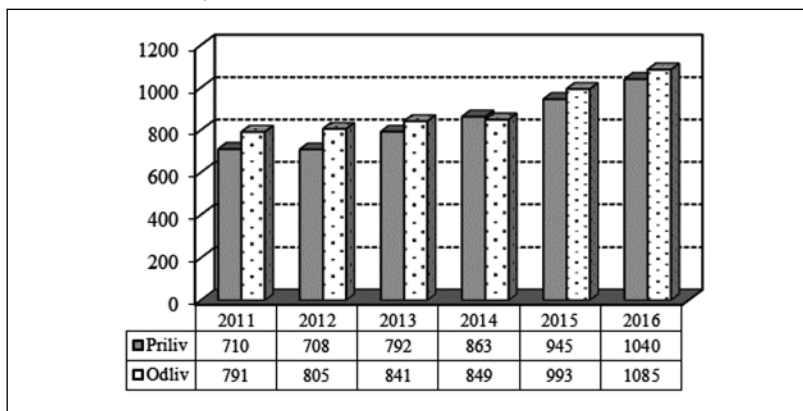
Devizni priliv od turizma Republike Srbije, tokom 2014. godine iznosio je 863,2 miliona evra i bio veći za 8,9% u odnosu na prethodnu godinu (Grafikon 3). Devizni priliv od turizma u 2015. godini iznosio je 945,2 miliona evra i ostvaren je međugodišnji rast od 9,5%. Tokom 2016. godine devizni priliv od turizma iznosio je 1039,5 miliona evra i bio veći za 10,0% u odnosu na 2015. godinu.

Tabela 10. Devizni priliv i odliv od turizma po zemljama u 2016. (u hilj. evra)

	Priliv	Odliv
Bosna i Hercegovina	145696	16041
Slovenija	69386	30407
Crna Gora	66943	59770
Švajcarska	64073	15991
Velika Britanija	61361	17666
SAD	56637	22191
Nemačka	54355	75693
Hrvatska	52106	39330
Republika Makedonija	50538	11650
Austrija	25919	32542
Bugarska	28474	22898
Turska	26745	16283
Ruska Federacija	25999	21112
Izrael	23908	3398
Mađarska	22511	20627
Italija	21315	69867
Holandija	17744	13543
Rumunija	17292	7869
Francuska	16874	19791
Grčka	16759	404962
Ujedinjeni Arapski Emirati	15346	21429
Belgija	15139	4384
Španija	14468	31995
Kipar	12544	11229
Poljska	11475	5733
Švedska	10151	2224
Danska	8354	2673
Slovačka	5506	4995
Češka Republika	5426	16969
Norveška	5118	2366
Ostale zemlje	71359	59153
Ukupno	1039521	1084781

Izvor: Devizna statistika NBS.

Grafikon 3. Devizni priliv i odliv od turizma u Republici Srbiji, 2011.-2016. godine (u mil. evra)



Posmatrano po zemljama, ostvarenom deviznom prilivu od turizma Republike Srbije, najviše doprinose turisti iz Bosne i Hercegovine (14,0%, Tabela 10). Zatim slede Slovenija sa 6,7%, Crna Gora (6,4%), Švajcarska (6,2%), Velika Britanija (5,9%) itd. To pokazuje da su inostrani gosti u najvećem broju uslovno rečeno „strani“ jer dolaze uglavnom iz bivših jugoslovenskih republika. Tako u ukupno ostvarenom deviznom prilivu od turizma Bosna i Hercegovina, Crna Gora, Hrvatska, Slovenija i Makedonija učestvuju sa 37%. Posmatrajući turistički odliv domaćih turista zapaža se da se na prvom mestu nalazi Grčka sa učešćem od 37,3% u ukupnom odlivu; zatim slede Nemačka i Italija sa učešćima 7,0% odnosno 6,4% itd.

11. Smeštajni kapaciteti u Republici Srbiji

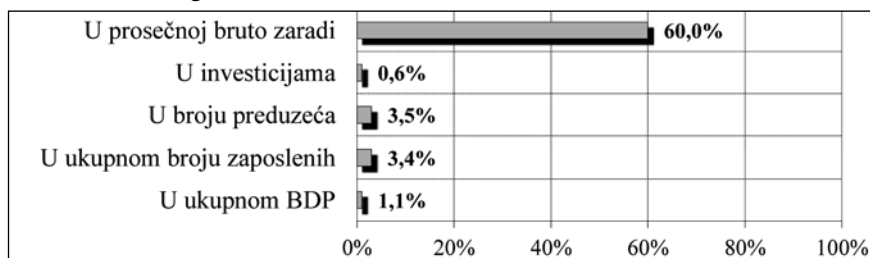
Republika Srbija danas raspolaže u sektoru turizma sa 46362 sobe odnosno 109469 ležaja (2016. godina, Tabela 11). Broj soba je, u odnosu na početnu posmatranu godinu (48041, 2010. godina), smanjen za 3,5%, a u odnosu na prethodnu (2015. godina, 45396 soba) povećan je za 2,1%. Broj ležajeva, u 2016. godini (109469) u odnosu na početnu posmatranu godinu (119427, 2010. godina), smanjen je za 8,3% a u odnosu na prethodnu (2015. godina, 106102 sobe) povećan je za 3,2%.

Tabela 11. Smeštajni kapaciteti u turizmu, 2010.-2016.godina

	Sobe	Ležaji
2010.	48041	119427
2012.	46020	113385
2015.	45396	106102
2016.	46362	109469

Izvor: Republički zavod za statistiku Republike Srbije, Statistički godišnjaci

12. Značaj turizma u privredi Republike Srbije

Grafikon 4. Mesto sektora Usluge smeštaja i ishrane u privredi Republike Srbije u 2016. godini

Izvor: Autor prema podacima Republičkog zavoda za statistiku Srbije

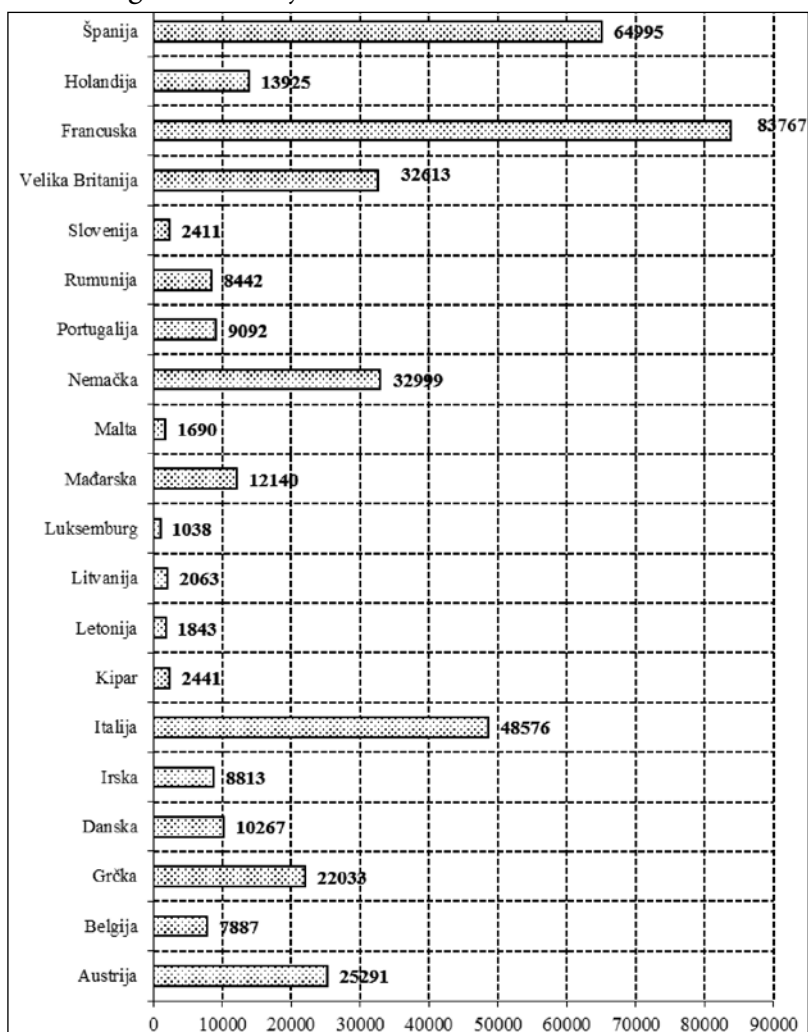
13. Poređenja sa zemljama u okruženju

Radi boljeg sagledavanja turističke delatnosti u Republici Srbiji može se izvršiti poređenje sa zemljama iz našeg okruženja (republikama bivše SFRJ - Slovenijom, Hrvatskom, Bosnom i Hercegovinom, Crnom Gorom i Makedonijom). Kao što je prikazano na Grafikonu 6 zapaža se da u Sloveniji u ukupnom broju dolazaka gostiju, broj stranih gostiju čini 68,9% a broj domaćih 31,1%. U Hrvatskoj i Crnoj Gori strani gosti čine 88,4% odnosno 91,1% a domaći 11,6% odnosno 8,9%. Odnos stranih i domaćih gostiju u Bosni i Hercegovini iznosi 74,3% prema 25,7%. U Makedoniji u ukupnom broju dolazaka, broj stranih gostiju učestvuje sa 59,6% a broj domaćih sa 40,4%. U Republici Srbiji broj domaćih gostiju čini 53,5% a broj stranih 46,5%.

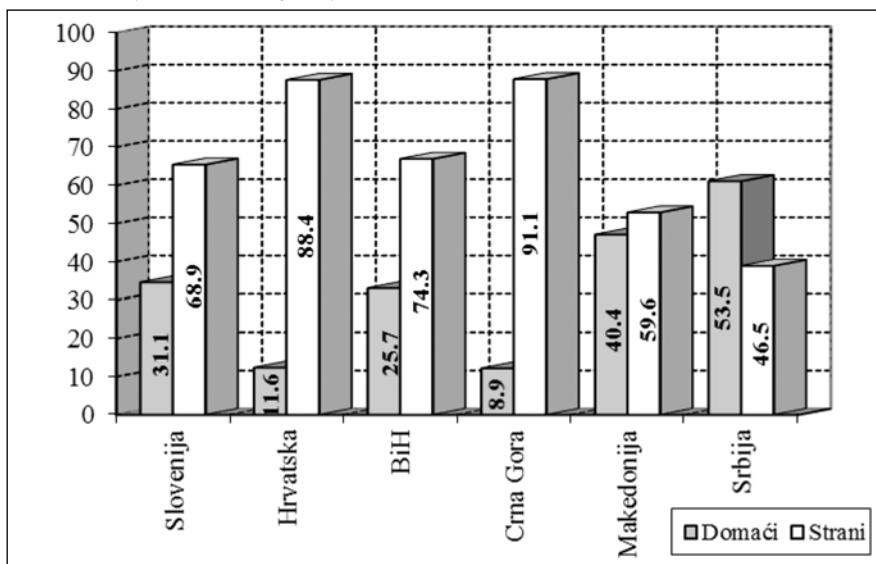
Tabela 12. Broj dolazaka gostiju u turizmu, 2015.godina (u hiljadama)

	Srbija	Slovenija	Hrvatska	Bosna i Hercegovina	Crna Gora	Makedonija
Ukupno	2437	3927	14343	723	1713	816
Domaći	1305	1221	1660	186	153	330
Strani	1132	2706	12683	537	1560	486

Izvor: Statistički godišnjaci navedenih zemalja, 2015. godina

Grafikon 5. Broj dolazaka stranih turista u nekim zemljama EU, 2014. godina, u hiljadama

Izvor: Autor prema podacima Statističkog godišnjaka Ujedinjenih nacija, 2015.

Grafikon 6. Broj dolazaka gostiju u turizmu (%)

Izvor: Autor prema podacima Statističkih godišnjaka navedenih zemalja

Kao što je prikazano na Grafikonu 5 broj dolazaka stranih turista u zemljama EU kreće se od 1 milion u Luksemburgu do 83 miliona u Francuskoj.

14. Zaključak

Dosadašnje stanje u turizmu u Republici Srbiji bilo je uslovljeno celokupnim društveno-ekonomskim razvojem u zemlji. Osamdesete i devedesete godine su zbog svih dešavanja u političkom i ekonomskom smislu bile velika kočnica za razvoj turizma. Nakon toga, dolazi do postepenog oporavka i povećanja broja gostiju i ostvarenih noćenja.

Analizirajući rezultate turističke delatnosti u Republici Srbiji može se reći da se poslednjih godina zapaža sve veći broj stranih gostiju, kako iz zemalja iz okruženja, tako sve više i iz ostalih evropskih zemalja, što doprinosi povećanju deviznog priliva u turističkom prometu.

Posmatrajući noćenja turista po vrstama turističkih mesta u posmatranom periodu, najveći promet su imala banjska mesta sa učešćem od 27,7%, zatim planinska 25,6%, Beograd 22,6% itd. Domaći turisti su najviše boravili u banjskim i planinskim mestima, a strani u Beogradu.

Što se tiče teritorijalne rasprostranjenosti broja noćenja turista zapažaju se velike razlike unutar Republike Srbije. Tako je na teritoriji Vojvodine ostvareno

14,9% ukupnog broja noćenja, a u ostalom delu Republike Srbije 85,1% (od toga najviše u Regionu Šumadije i Zapadne Srbije, 45,3%).

Učešće turističko-ugostiteljske privrede u ukupnom BDP Republike Srbije iznosi 1,1% (2016.), a u investicijama 0,6%. Učešće sektora Usluge smeštaja i ishrane u ukupnom broju preduzeća Republike Srbije iznosi 3,5% (2016. godina). Povećan je broj formiranih preduzeća u ovom sektoru (u 2016. godini, sa ukupnim brojem od 3428 preduzeća ostvareno je povećanje od 10,4% u odnosu na prethodnu godinu). Istovremeno je povećan broj zaposlenih u ovom sektoru za 3,9% u odnosu na prethodnu (2015. godina). Učešće ovog sektora u ukupnom broju zaposlenih iznosi 3,4% (2016. godina). Zaposleni ovog sektora ostvarili su učešće od 60,0% u prosečnoj bruto zaradi.

Na osnovu svega iznetog može se zaključiti da dostignuti nivo razvoja turističke delatnosti u Republici Srbiji, po svim bitnim pokazateljima, zaostaje u odnosu na resursne i tržišne mogućnosti njegovog razvoja. Zbog toga je potrebno preduzimanje odgovarajućih mera od strane države da bi multiplikativna funkcija turizma podstakla ukupan razvoj privrede Republike Srbije.

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TOURISM INDUSTRY DEVELOPMENT IN THE REPUBLIC OF SERBIA (2008-2017)

The economy of many countries in the world are based on tourism, which is especially significant in its multiplier effect on trade flows. Tourism has an impact (direct or indirect) on the Gross Domestic Product (GDP), the balance of payments, employment, investment activity, etc.

The topic of this paper is tourism development in the Republic of Serbia in the period from 2008 to 2017. The analysis was performed by analyzing investments in tourism, number of enterprises, number of employees and average wages in this area, the number of arrivals and overnight stays in the Republic of Serbia, overnight stays by different types of resorts, territorial distribution, foreign currency inflow from tourism by country, and international comparisons of the Republic of Serbia with neighboring countries and the EU member states in the number of foreign tourist arrivals. In the analysis, in addition to data from research conducted in the Statistical Office of the Republic of Serbia, data from the National Bank of Serbia and the Ministry of Trade, Tourism and Telecommunications, have been applied as well.

Keywords: *Tourism activities, arrivals, nights, foreign exchange earnings, Republic of Serbia*

RAZLIKE U POTROŠNJI LOKALNE HRANE TURISTA IZ BIVŠE REPUBLIKE JUGOSLAVIJE – STUDIJE BEOGRAD I NOVI SAD****

Iskustvu na destinaciji, osim prirodnih i društvenih atrakcija, doprinosi i lokalna hrana koja je nematerijalno nasleđe destinacije i predstavlja kulturu lokalne zajednice. Cilj studije je ispitivanje razlika u potrošnji lokalne hrane između turista bivših jugoslovenskih republika sa uvažavanjem gradskih centara u kojima su boravili, Beograd i Novi Sad u Republici Srbiji. Istraživanje je sprovedeno na uzorku od 674 ispitanika. Razlike su ispitane dvofaktorskom analizom varijanse i T – testom nezavisnih uzorka. Ova studija izveštava o istraživanju koje je u vezi sa potrošnjom lokalne hrane na destinaciji, razvoju urbanog turizma i percepciji turista iz bivših jugoslovenskih republika.

Ključne reči: lokalna hrana, bivše Republike Jugoslavije, Beograd, Novi Sad

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1. Uvod

Dinamičan razvoj velikih urbanih centara i sve značajniji razvoj različitih funkcija ukazuju na stvaranje različitih tipova turističkih kretanja usmerenih prema ovim urbanim sredinama. U predmetnoj literaturi, važno je naglasiti da je značajan broj studija istraživao potrošnju hrane na turističkoj destinaciji.^{1, 2, 3} Druge studije pokazuju da potrošnja za hranu može iznositi i do jedne trećine ukupnog rashoda turista.⁴ Postoje značajne implikacije u potrošnji lokalne hrane na turističkim destinacijama i sve veći interes za istraživanje ove oblasti.⁵

Prema Smitu i saradnicima⁶, gastronomski turizam podrazumeva posetu destinaciji čiji je primarni cilj da zadovolji interesovanje za nacionalnu ili regionalnu gastronomiju, a uključuje konzumiranje hrane i pića, učenje o pripremanju jela, kupovinu proizvoda u vezi sa hranom, kao i pohađanje kurseva kuvanja.

Termin gastronomski ili kulinarski turista, odnosi se na sve one koji putuju da bi konzumirali hranu i piće lokalne kuhinje karakteristične za neku zemlju ili regiju. Prema tome, turistima hrana i piće predstavljaju turističku atrakciju⁷.

Kada je reč o značaju gastronomskog turizma u turističkoj ponudi, mnoga istraživanja ističu lokalnu kuhinju destinacije kao primarnu atrakciju gastronomskog turizma⁸ i gastronomiju koja predstavlja element održivog nacionalnog turizma i odražava odnos sa tradicijom i istorijom destinacije⁹.

¹ Erik Cohen, Nir Avieli (2004): "Food in tourism: Attraction and impediment". *Annals of Tourism Research*, 31(4), 755-778.

² Chang CY. Richard, Jakša Kivela, Athena HN. Mak (2010): "Food preferences of Chinese tourist". *Annals of Tourism Research*, 37(4), 989-1011.

³ Jeffrey. W. Stewart, Linda Bramble, Donald Ziraldo (2008): "Key challenges in wine and culinary tourism with practical recommendations". *International Journal of Contemporary Hospitality Management*, 20(3), 303-312.

⁴ Marcel Meler, Zdenko Cerovic (2003): "Food marketing in the function of tourist product development". *British Food Journal*, 105(3), 175-192.

⁵ Athena HN. Mak et al. (2012): "Factors influencing tourist food consumption". *International Journal of Hospitality Management*, 31(3), 928-936.

⁶ Smith Melanie, Nicola MacLeod, Margaret H. Robertson (2010): *Key concepts in tourist studies*. Sage.

⁷ Branislav Rabotić (2003): "Gastronomija kao turistička atrakcija". Hotelska kuća, Zbornik radova, HORES.

⁸ Branislav Rabotić (2003): "Gastronomija kao turistička atrakcija". Hotelska kuća, Zbornik radova, HORES.

⁹ Tatjana Stojanović, Slobodan Čerović (2008): "Značaj gastronomske ponude za razvoj seoskog turizma Srbije". *Zbornik radova*, Географски факултет, Универзитета у Београду, LVI, 165 -176.

Prema Strategiji razvoja turizma Republike Srbije¹⁰ od 2016. do 2025. godine, gastronomski turizam je naveden kao ključni turistički trend, a konzumacija hrane i pića na turističkoj destinaciji je deo turističkog proizvoda, kako gastronomskog turizma, tako i svakog drugog oblika turizma. Osim toga, Strategija se posebno odnosi na ruralne destinacije u kojima je dostupnost lokalne hrane daleko veća od urbanih centara.

Prema saznanjima autora, konstatuje se da u Republici Srbiji na osnovu analizirane literature nije rađena slična studija, već samo istraživanja koja se odnose na razlike u socio-demografskim karakteristikama stranih turista u lokalnoj gastronomiji¹¹ i gastronomija kao sredstvo marketinga destinacije.¹² Glavni predmet ovog rada je ispitivanje razlika u potrošnji lokalne hrane između turista bivših jugoslovenskih republika sa uvažavanjem gradskih centara u kojima su boravili. Skala u prethodnom istraživanju¹³ je sveobuhvatna i odnosi se na lokalnu gastronomiju, dok skala koja je korišćena u ovoj studiji je pojednostavljena i odnosi se na potrošnju lokalne hrane. Ova studija izveštava o istraživanju koje je u vezi sa potrošnjom lokalne hrane na destinaciji i percepciji turista iz bivših jugoslovenskih republika.

Studija je fokusirana na turiste iz bivših jugoslovenskih zemalja (sa izuzetkom Srbije) koji su posetili Beograd i Novi Sad. Razlog za ispitivanje percepcije stranih turista je njihovo učešće u velikom broju turističkih kretanja u gradskim centrima.¹⁴ Istovremeno, činjenica je da su strani turisti u Republici Srbiji državljani bivših jugoslovenskih zemalja i neophodno je sagledati strukturu njihovih dolazaka i noćenja. Bjelac i saradnici¹⁵, ističu rezultate istraživanja koji ukazuju da čak 33,9% turista iz bivših jugoslovenskih zemalja učestvuje u ukupnom broju stranih turista koji posećuju Republiku Srbiju.

Prema podacima Republičkog zavoda za statistiku, tokom 2016. godine, Beograd je posetilo 737.063 a Novi Sad 106.681 stranih turista (Tabela 1).

¹⁰ Strategija razvoja turizma Republike Srbije (2016). Ministarstvo trgovine, turizma i telekomunikacija, Republike Srbije. Preuzeto 15.01.2016. <http://rpksrem.co.rs/wp-content/uploads/2016/02/strategija-razvoja-turizma.pdf>

¹¹ Nikola Vuksanović, Dragan Tešanović, Bojana Kalenjuk (2016): "The local gastronomy as a tool of marketing of a destination – case of the Republic of Serbia". *Marketing*, 47(4), 305 – 311.

¹² Nikola Vuksanović et al. (2017): "Socio – demographic characteristics as determinants of differences in perception of local gastronomy". *Economics of Agriculture*, 64(1), 357 – 373.

¹³ Nikola Vuksanović et al. (2017): "Socio – demographic characteristics as determinants of differences in perception of local gastronomy". *Economics of Agriculture*, 64(1), 357 – 373.

¹⁴ Smith Melanie, Nicola MacLeod, Margaret H. Robertson (2010): *Key concepts in tourist studies*. Sage.

¹⁵ Željko Bjeljac i saradnici (2017): „Turizam Srbije. Poglavlje u „Geografija Srbije“ (ur. Milan Radovanović), posebno izdanje Geografskog instituta „Jovan Cvijić“ SANU, br. 91, 753 – 809.

Tabela 1. Dolasci turista prema izabranim turističkim mestima

	ukupno turista	ukupno domaćih turista	ukupno stranih turista
Beograd – gradska naselja	877061	164500	712561
Novi Sad – gradska naselja	158510	58670	99840
Banjska mesta	477102	391085	86017
Planinska mesta	522424	426793	96631
Ostala turistička mesta (Kragujevac, Subotica)	605136	369032	236104
Grad Beograd	913150	176087	737063
Grad Novi Sad	174489	67808	106681

Izvor: Republički zavod za statistiku, (2016)

2. Teorijska osnova i hipoteze istraživanja

Da bi privukli više turista, mnoge destinacije integrišu lokalnu hranu (kuhinju) u turističku ponudu kako bi odgovorile na promene na konkurentnom globalnom turističkom tržištu.¹⁶ Dostupna literatura sugerise da se hrana i turizam mogu povezati na nekoliko načina¹⁷. Prvo, hrana može dodati vrednost turističkom proizvodu povećavajući svoju atraktivnost¹⁸. Drugo, hrana se smatra strateškim alatom za upravljanje koji može stvoriti pozitivnu sliku destinacije^{19, 20}

¹⁶ Robinson NS. Richard, Donald Getz (2014): "Profiling potential food tourists: An Australian study". *British Food Journal*, 116(4), 690-706.

¹⁷ Henderson C. Joan (2009): "Food tourism reviewed". *British Food Journal* 111(4).

¹⁸ Hegarty A. Joseph, Barry G. O'Mahony (2001): "Gastronomy: a phenomenon of cultural expressionism and an aesthetic for living". *Hospitality Management* 20(1).

¹⁹ Renata Fox (2007): "Reinventing the gastronomic identity of Croatian tourist destinations". *International Journal of Hospitality Management*, 26(3), 546-559.

²⁰ Renko Sanda, Natasha Renko, Tea Polonijo (2010): "Understanding the role of food in rural tourism development in a recovering economy". *Journal of Food Products Marketing*, 16(3), 309-324.

i privući i zadržati turiste na destinaciji.^{21, 22, 23} Treće, hrana može biti glavni motiv putovanja za turiste koji traže hranu i iskustva dok su na destinaciji.²⁴

Kulturno značenje hrane podržava lokalnu hranu da bude važan identitet destinacije. Pošto lokalna hrana svake destinacije ima svoj poseban kulturološki izraz, korišćenjem gastronomije može se stvoriti jedinstveni identitet destinacije. Pored prirodnih ili istorijskih atrakcija, gastronomija je dostupna alternativa za destinaciju da razvije svoj identitet. Identitet stvoren na gastronomiji se može lako reklamirati i atraktivan je za destinaciju.^{25, 26}

Hrana ili iskustvo obedovanja je jedan od važnih faktora koji utiču na percepciju destinacije od strane turista. Rezultati studije²⁷ pominju brojne političke, ekonomske i društvene promene koje su uticale na veliki broj migracija među bivšim jugoslovenskim republikama, a koje utiču na turističku potrošnju u Srbiji. Stoga se predlaže sledeća hipoteza:

H1. *Postoje statistički značajne razlike u potrošnji lokalne hrane između gradova Beograda i Novog Sada.*

Postoji ograničeno istraživanje koje se bavi unakrsnim kulturnim razlikama u percepciji destinacije ili hrane na destinaciji.^{28, 29} Nild et al. (2000)³⁰ ističe da procene turista o različitim atributima usluga hrane – kao što su kvalitet hrane, prezentacija hrane, raznovrsnost hrane, vrednost za novac, standard hrane – variraju kod posetilaca iz različitih regiona. Tačnije, utvrdili su da su turisti

²¹ Nield Kevin, Metin Kozak, Geoffrey LeGrys (2000): "The role of food service in tourist satisfaction". *International Journal of Hospitality Management*, 19(4), 375-384.

²² Erik Cohen, Nir Avieli (2004): "Food in tourism: Attraction and impediment". *Annals of tourism Research*, 31(4), 755-778.

²³ Jakša Kivela, John C. Crotts (2006): "Gastronomy tourism: A meaningful travel market segment". *Journal of Culinary Science & Technology*, 4(2-3), 39-55.

²⁴ Jones Andrew, Ian Jenkins (2005): "A taste of Wales-Blas Ar Gymru: institutional mailaise in promoting Welsh food tourism product". *Tourism and gastronomy*, 115-131.

²⁵ Jakša Kivela, John C. Crotts (2006): "Gastronomy tourism: A meaningful travel market segment". *Journal of Culinary Science & Technology*, 4(2-3), 39-55.

²⁶ Bendegul Okumus, Fevzi Okumus, Bob McKercher (2007): "Incorporating local and international cuisines in the marketing of tourism destinations: The cases of Hong Kong and Turkey". *Tourism Management*, 28(1), 253-261.

²⁷ Tamara Lukić et al. (2014): "Politics in the Balkan countryside: case study in Serbia". *Eastern European Countryside*, 20(1), 99-124.

²⁸ Nield Kevin, Metin Kozak, Geoffrey LeGrys (2000): "The role of food service in tourist satisfaction". *International Journal of Hospitality Management*, 19(4), 375-384.

²⁹ Yu Larry, Munhtuya Goulden (2006): "A comparative analysis of international tourists' satisfaction in Mongolia". *Tourism management*, 27(6), 1331-1342.

³⁰ Nield Kevin, Metin Kozak, Geoffrey LeGrys (2000): "The role of food service in tourist satisfaction". *International Journal of Hospitality Management*, 19(4), 375-384.

iz zapadnoevropskih zemalja manje zadovoljni sa svim delovima iskustva u pružanju usluga hrane od onih iz Centralne i Istočne Evrope. Istovremeno, Iu i Golden (2006)³¹ primećuju da zadovoljstvo atributima destinacije (npr. lokalna hrana, gostoprimstvo, istorijske i kulturne atrakcije) varira između evropskih, američkih, japanskih i drugih zemalja Azije. Međutim, druge studije³² nisu pronašle razlike između zemlje (regiona) i zadovoljstva. S obzirom na gore navedene rezultate, predlaže se sledeća hipoteza:

H2. *Postoje statistički značajne razlike u potrošnji lokalne hrane između turista bivših jugoslovenskih republika.*

3. Metodologija

3.1. Uzorak

U istraživanju ciljnu populaciju čine strani turisti iz bivših jugoslovenskih republika (BJR) čiji su dolasci registrovani na teritoriji gradskih centara Beograda i Novog Sada u Republici Srbiji. Prema podacima Republičkog zavoda za statistiku, tokom 2016. godine, Beograd je posetilo 737.063 a Novi Sad 106.681 stranih turista.³³ Od ukupnog broja stranih turista, Republiku Srbiju posetilo je: 100.579 turista iz Bosne i Hercegovine, 55.263 iz BJR Makedonije, 75.732 iz Republike Hrvatske, 77.396 iz Crne Gore i 74.096 iz Slovenije. Jedan od dva kriterijuma koji se uzima u obzir prilikom izbora mesta za istraživanje jeste i Zakon o turizmu³⁴, gde su Beograd i Novi Sad definisani kao turističke destinacije prve kategorije. Prema tome, lokacije istraživanja su administrativni centri Beograd i Novi Sad.

Terensko istraživanje je sprovedeno u gradu Beogradu, glavnom gradu Republike Srbije, i Novom Sadu, glavnom gradu AP Vojvodine. Oba grada su administrativni, ekonomski, politički i kulturni centri zemlje.

Metoda uzorkovanja je metod prostog slučajnog uzorka. Anketiranje je sprovedeno posredstvom turističkih organizacija Beograda i Srbije na teritoriji Beograda, dok su turističke organizacije Novog Sada i Autonomne Pokrajine

³¹ Yu Larry, Munhtuya Goulden (2006): "A comparative analysis of international tourists' satisfaction in Mongolia". *Tourism management*, 27(6), 1331-1342.

³² Milfelner Borut, Boris Snoj, Aleksandra P. Korda (2011): "Measurement of perceived quality, perceived value, image and satisfaction interrelations of hotel services: comparison of tourists from Slovenia and Italy". *Drustvena Istrazivanja*, 113.

³³ Republički zavod za statistiku (2016). webzs.stat.gov.rs (25.9.2016).

³⁴ Zakon o turizmu, *Službeni glasnik RS* br. 36/09, 88/10, 99/2001 - dr. zakon, 93/2012 i 84/2015.

Vojvodine u Novom Sadu obavile datu aktivnost, pri čemu je svaki strani turista koji je posetio organizacije bio član skupa slučajnih uzoraka.

Studija je obuhvatila 674 ispitanika iz šest bivših jugoslovenskih republika: 140 ispitanika iz Hrvatske, 128 ispitanika iz Bosne i Hercegovine, 148 ispitanika iz Crne Gore, 138 ispitanika iz BJR Makedonije i 120 ispitanika iz Slovenije (Tabela 2).

Tabela 2. Polna struktura uzoraka

Država	muški	ženski	ukupno
Hrvatska	55	85	140
Bosna i Hercegovina	48	80	128
Crna Gora	70	78	148
BJR Makedonija	49	89	138
Slovenija	54	66	120
Ukupno	276	398	674

Tabela 3. prikazuje starosnu strukturu uzorka po zemljama. Skoro polovina uzorka se sastoji od mlađih ispitanika od 18 do 30 godina. Sledeća kategorija se sastoji od ispitanika starosti od 31 do 40 godina. Najmanje ispitanika je u kategoriji od 71 do 80 godina. Samo dva ispitanika nisu dala informacije o uzrastu.

Tabela 3. Starosna struktura uzoraka

Država	kategorija (godine)					
	18-30	31-40	41-50	51-60	61-70	71-80
Hrvatska	57	33	17	17	6	1
Bosna i Hercegovina	60	22	26	15	5	0
Crna Gora	75	29	22	8	6	0
BJR Makedonija	47	33	21	17	7	8
Slovenija	67	24	18	22	7	2
Ukupno	306	141	104	79	31	11

Tabela 4. prikazuje strukturu uzorka prema nivou obrazovanja po zemljama. Najmanji broj ispitanika završio je samo osnovnu školu (N = 15). Sličan broj ispitanika je završio srednju školu (N = 310) i visoku / fakultet (N = 296). Nešto manji broj ispitanika završio je master i doktorske studije (N = 53).

Tabela 4. *Struktura uzorka prema nivou obrazovanja*

Država	Nivo obrazovanja			
	Osnovna škola	Srednja škola	Visoka - Univerzitet	Master - Doktorske
Hrvatska	2	55	57	15
Bosna i Hercegovina	3	60	46	8
Crna Gora	2	72	60	9
BJR Makedonija	6	64	72	8
Slovenija	2	59	61	13
Ukupno	15	310	296	53

3.2. Upitnik

Upitnik je sastavljen iz tri dela. Prvi deo upitnika je saglasnost ispitanika da popune upitnik koji je anoniman. Drugi deo se odnosi na demografske i socio-ekonomske karakteristike ispitanika: pol, starost i nivo obrazovanja. Treći deo se odnosi na lokalnu potrošnju hrane (Tabela 5), koja sadrži sedam stavki sastavljenih na takav način da stimulišu ispitanike da procene svoj stav prema potrošnji lokalne hrane (preuzeto od Mohd Hairi Jalis et al., 2009.³⁵ i prilagođeno u Vuksanović, 2017³⁶). Autori su koristili pojam “lokalna hrana”, koji se nije koristio u prethodnom istraživanju.³⁷ Ranije studije³⁸ ukazuju na to da pojam “lokalna hrana” doprinosi popularnosti destinacije i potrošnje hrane. Odgovori su mereni Likertovom skalom, kako sledi: 1- u potpunosti se ne slažem, 2- uglavnom se ne slažem, 3- neutralan, 4- uglavnom se slažem, 5 – u potpunosti se slažem.

Kada je reč o lokalnoj hrani, pod njom se prodrzumeva srpska hrana i specijaliteti. Iako postoje sličnosti u ponudi gastronomskih specijaliteta između država bivših jugoslovenskih republika, kod pojedinih ipak postoje razlike. Naime, razlike su u načinu pripreme pojedinih proizvoda (npr. Krem-pita ili Kremšnita), zatim specijaliteti kao što su kajmak, kulen, kobasica, itd, ali i jela

³⁵ Mohd Hairi Jalis et al. (2009): “Malaysian gastronomic tourism products: Assessing the level of their acceptance among the western tourists”. *South Asian Journal of Tourism and Heritage*, 2(1), 31-44.

³⁶ Nikola Vuksanović (2017): *Gastronomska dimenzija kvaliteta turističkog proizvoda i njen uticaj na stavove posetilaca gradskih centara Srbije*. Doktorska disertacije, Novi Sad: Prirodno – matematički fakultet.

³⁷ *Ibid.*

³⁸ Baloglu Seyhmus, Ken W. McCleary (1999): “US international pleasure travelers’ images of four Mediterranean destinations: A comparison of visitors and nonvisitors”. *Journal of travel research*, 38(2). 144-152.

sa roštilja i mnoga druga jela koja su poprimila regionalni karakter (Svadbarski kupus iz Šumadije)³⁹.

Tabela 5. Skala za ispitivanje potrošnje lokalne hrane

Stavke
1. Konzumirao/la sam dosta lokalne hrane tokom odmora
2. Probao/la sam mnoge lokalne specijalitete
3. Iako mi se svidela lokalna hrana, druga hrana je uvek moj prvi izbor tokom boravka
4. Tokom boravka sam više konzumirao/la brzu hranu u odnosu na lokalnu
5. Nisam mogao/la da podnesem miris nekih lokalnih jela
6. Konzumirao/la sam samo lokalnu hranu blagog ukusa
7. Konzumirao/la sam dosta slane i začinjene lokalne hrane tokom odmora

3.3. Analiza podataka

Za obradu podataka korišćen je softver paket SPSS: 20 (SPSS, 2008). Nedostajući podaci su zamenjeni EM metodom, dok analize odstupajućih vrednosti ukazuju da ni jedna stavka ne odstupa.⁴⁰

Za ispitivanje razlika između grupa sprovedena je dvofaktorska ANOVA i T-test nezavisnih uzoraka, gde je jedan faktor potrošnja lokalne hrane (7 nivoa), a drugi faktori su: država iz koje dolaze ispitanici (5 nivoa) i grad (Beograd ili Novi Sad). Nezavisne varijable u ovoj studiji su: država i grad, a zavisna varijabla je potrošnja lokalne hrane.

4. Rezultati istraživanja

4.1. Deskriptivna analiza

Potrošnja lokalne hrane je operacionalizovana kao zbir odgovora na svih sedam stavki iz trećeg dela upitnika. Viši skor označava pozitivan stav prema potrošnji lokalne hrane (Tabela 6). Većina stranih turista se slaže da su konzumirali dosta srpske hrane ($M_{NS} = 4.50$, $M_{BG} = 4.36$, stavka 1), dok su turisti nešto manje konzumirali specijalitete tokom svog odmora ($M_{NS} = 4.21$, $M_{BG} = 4.19$, stavka 2). Ovo bi moglo biti tačno pošto postoji kolektivni nedostatak slaganja sa izjavom da je druga hrana bila njihov prvi izbor ($M_{NS} = 3.13$, $M_{BG} = 3.13$, stavka 3), kao i poricanja konzumiranja brze hrane i internacionalnih jela

³⁹ Nikola Vuksanović (2017): *Gastronomska dimenzija kvaliteta turističkog proizvoda i njen uticaj na stavove posetilaca gradskih centara Srbije*. Doktorska disertacije, Novi Sad: Prirodno – matematički fakultet.

⁴⁰ Barbara G. Tabachnick, Linda S. Fidell (2007): *Using Multivariate Statistics* (5th ed). Allyn & Bacon, Inc. Needham Heights, MA, USA

tokom odmora ($M_{NS} = 3.05$, $M_{BG} = 2.93$, stavka 4) i nisu se složili sa tim da nisu mogli da podnesu miris nekih srpskih jela ($M_{NS} = 2.96$, $M_{BG} = 2.67$, stavka 5). Važno je naglasiti i to da, iako su konzumirali dosta srpske hrane, uglavnom je neutralan stav prema konzumiranju hrane blagog ukusa ($M_{NS} = 3.30$, $M_{BG} = 3.14$, stavka 6). Navedeni stavovi su dalje delimično potvrđeni neutralnim slaganjem ispitanika sa stavkom „Konzumirao/la sam dosta srpske slane i začinjene hrane tokom odmora“ ($M_{NS} = 3.20$, $M_{BG} = 2.72$, stavka 7).

Tabela 6. Deskriptivni pokazatelji stavki skale za ispitivanje potrošnje lokalne hrane

Stavke	Novi Sad		Beograd	
	M	SD	M	SD
1. Konzumirao/la sam dosta lokalne hrane tokom odmora	4.50	.75	4.36	1.08
2. Probao/la sam mnoge lokalne specijalitete	4.21	1.02	4.19	1.11
3. Iako mi se svidela lokalna hrana, druga hrana je uvek moj prvi izbor tokom boravka	3.13	1.29	3.13	1.25
4. Tokom boravka sam više konzumirao/la brzu hranu u odnosu na lokalnu	3.05	1.38	2.93	1.37
5. Nisam mogao/la da podnesem miris nekih lokalnih jela	2.96	1.42	2.67	1.53
6. Konzumirao/la sam samo lokalnu hranu blagog ukusa	3.30	1.23	3.14	1.27
7. Konzumirao/la sam dosta slane i začinjene lokalne hrane tokom odmora	3.20	1.41	2.72	1.41

U Tabeli 7, prikazani su deskriptivni pokazatelji primenjenih skala. Na osnovu vrednosti multivarijatnog skjunisa i kurtosisa, može se zaključiti da odgovori ispitanika na skali potrošnje lokalne hrane ne odstupaju značajno od normalne distribucije. U ovom istraživanju koeficijenti pouzdanosti izraženi u terminima Kambahove-a prikazani su u Tabeli 7.

Tabela 7. Deskriptivna statistika i koeficijenti pouzdanosti upitnika

Država	M	SD	Skunis	Kurtosis	K-S	α
Hrvatska	20.65	5.47	-.011	-.060	.066*	.73
Bosna i Hercegovina	20.39	5.51	-.010	-.448	.061*	.70
Crna Gora	18.91	5.07	.029	-.179	.053	.75
BJR Makedonija	21.79	4.59	.401	.211	.081*	.72
Slovenija	21.73	5.12	.140	-.258	.071*	.74
Ukupno	20.64	5.25	.020	-.131	.046*	.73

Napomena. * $p < 0.1$: Min. – minimalni skor; Maks. – maksimalni skor; M – aritmetička sredina; SD – standardna devijacija; Skju. – skjunis; Kurt. – kurtosis; K-S – Kolmogorv-Smirnovljev statistik; α – pouzdanost skale merena internom konzistencijom

4.2. Razlike u potrošnji lokalne hrane između bivših jugoslovenskih republika

Rezultati jednosmerne ANOVA sa faktorom: država (nivo 6) i zavisna varijabla lokalna potrošnja hrane ukazuju na to da među ispitanicima iz različitih zemalja postoji statistički značajna razlika kada je u pitanju potrošnja lokalne hrane, $F(5, 1544) = 10,64$, $p < .01$, $\eta^2p = .03$. *Post hoc testovi (Scheffe) su pokazali da postoje statistički značajne razlike između ispitanika iz Crne Gore ($M = 18.92$, $SD = 5.07$) i BJR Makedonije ($M = 21.79$, $SD = 4.59$, $p < .01$), Crne Gore i Hrvatske ($M = 20.65$, $SD = 5.47$, $p < .01$), i Crne Gore i Slovenije ($M = 21.73$, $SD = 5.12$, $p < .01$). U sva tri slučaja pokazano je da ispitanici iz Crne Gore ostvaruju znatno niže rezultate u potrošnji lokalne hrane u odnosu na ispitanike iz pomenutih zemalja. Istovremeno, rezultati ukazuju da ne postoji statistički značajne razlike između ispitanika iz Bosne i Hercegovine u odnosu na ispitanike iz drugih analiziranih grupa.*

4.3. Razlike u potrošnji lokalne hrane između gradova

Rezultati T-testa za nezavisne uzorke ukazuju na značajnu razliku između turista koji su posetili Novi Sad ($M = 24,35$, $SD = 4,75$) i onih koji su posetili Beograd ($M = 23,14$, $SD = 4,63$). Vrednost T testa je 3.32 i značajna je na nivou $p < 0.00$. Rezultati pokazuju da su turisti koji su posetili Novi Sad dali nešto pozitivnije vrednovanje lokalne hrane u odnosu na Beograd.

Ispitanici koji su posetili Novi Sad konzumirali su više lokalnu hranu i specijalitete tokom svog odmora u odnosu na ispitanike u Beogradu. Ono što je zajedničko za ispitanike u Novom Sadu i Beogradu jeste da je lokalna hrana bila prvi izbor. Rezultati ukazuju da su miris lokalne hrane i začinjena jela više prihvaćeni kod ispitanika koji su posetili Novi Sad nego Beograd. Dobijena razlika se može objasniti jačim uticajem lokalne kuhinje na ispitanike u Novom Sadu, i samo iskustvo u vezi sa kulturom ishrane kroz konzumaciju ostavljaju na turiste u odnosu na ispitanike u Beogradu. Ukupna potrošnja lokalnih proizvoda se može pospešiti kvalitetnijom i sadržajnijom ponudom gastronomskih proizvoda. Ukazivanjem na značaj i tradiciju, kvalitet koji se tiče lokalnih hrane pridaje novu dimenziju turističkoj ponudi. Na ovaj način bi se unapredio uticaj novih proizvoda i očuvao uticaj prethodne ponude.

5. Diskusija istraživanja

Rezultati studije pokazuju da postoje razlike u potrošnji lokalne hrane između ispitanika iz Crne Gore i BJR Makedonije, Crne Gore i Hrvatske i Crne Gore i Slovenije. Ispitanici iz Crne Gore konzumiraju lokalnu hranu manje u odnosu na ispitanike iz BJR Makedonije, Hrvatske i Slovenije. Rezultati potvrđuju H1 da postoje razlike u potrošnji lokalne hrane između ispitanika

iz zemalja bivših jugoslovenskih republika. Ovo se može objasniti činjenicom da je Republika Srbija tokom devedesetih prošla kroz brojne promene⁴¹, tako da većina stranih turista dolazi iz bivših jugoslovenskih republika i istovremeno su najveći potrošači lokalne hrane.

Prema saznanjima autora, do sada nisu sprovedena slična istraživanja vezana za razlike u potrošnji lokalne hrane između Beograda i Novog Sada,⁴²,⁴³ tako da ova studija pruža novi uvid u značaj lokalne hrane na analiziranim lokacijama. Rezultati ukazuju na to da su ispitanici koji su posetili Novi Sad dali nešto pozitivnije vrednovanje lokalne hrane u odnosu na ispitanike koji su posetili Beograd. Rezultati potvrđuju H2, da postoje razlike u potrošnji lokalne hrane između gradova. Shodno tome, dobri primeri prakse iz Novog Sada koji utiču na potrošnju lokalne hrane kod turista se mogu uključiti i integrisati u ponudu Beograda.

Rezultati istraživanja, potrošnja lokalne hrane, pokazuju da postoje razlike u lokalnoj hrani između gradova koje se mogu objasniti u pretpostavci da te razlike proizilaze iz uticaja dve različite lokalne kuhinje. Konkretno, u Novom Sadu lokalna kuhinja razvijala se najviše pod uticajem Nemačke, Austrije, Slovačke i Mađarske, dok se u Beogradu razvijala pod uticajem Turske ili orijentalne kuhinje.⁴⁴ Moguće razlike se mogu objasniti na osnovu ponude jela koja su zastupljena u ponudi Novog Sada odnosno Beograda, a koja su se formirala pod uticajem pomenutih država i danas su prihvaćena u ugostiteljskim objektima. Na primer, ponuda pečenje od jagnječeg mesa i orijentalni deserti (baklava, urmašice, tulumbe itd.) su zastupljeni u ponudi beogradskih ugostiteljskih objekata. S druge strane, veliki izbor štrudli (mak, višnja, orasi itd.) koje su autentični deserti austrijske kuhinje, mogu se naći u ponudi novosadskih restorana.

U oba grada konzumacija lokalne hrane predviđa dalju potrošnju turista. Ovo je praksa koju treba negovati i dalje razvijati s obzirom da pokazuje pozitivnu percepciju. Ipak, između gradova postoje značajne razlike. Ove promene se mogu objasniti na osnovu turističke ponude Novog Sada, tj. poklanja se veća pažnja raznovrsnosti i dostupnosti, promociji lokalnih pića. Ipak zanemaruje se bitan segment koji se tiče kulture ishrane. Istovremeno, dobijena razlika se može objasniti samom strukturom posetilaca ova dva grada. Opis uzorka ukazuje, prema polu, starosti i obrazovanju, da više žene posećuju Novi Sad i Beograd,

⁴¹ Tamara Lukić et al. (2014): "Politics in the Balkan countryside: case study in Serbia". *Eastern European Countryside*, 20(1), 99-124.

⁴² Nikola Vuksanović et al. (2017): "Socio – demographic characteristics as determinants of differences in perception of local gastronomy". *Economics of Agriculture*, 64(1), 357 – 373.

⁴³ Nikola Vuksanović, Dragan Tešanović, Bojana Kalenjuck (2016): "The local gastronomy as a tool of marketing of a destination – case of the Republic of Serbia". *Marketing*, 47(4), 305 – 311.

⁴⁴ Bojana Kalenjuck (2014): *Vojvodina kao destinacija gastronomskog turizma*. Doktorska disertacije, Novi Sad: Prirodno – matematički fakultet.

zatim najveći broj ispitanika je između 18 i 30 godina i najviše ispitanika sa srednjom školom su posetila oba administrativna centra.

5.1 Ograničenje istraživanja

Glavno ograničenje ove studije odnosi se na geografsko područje (turističko područje) u kojem je istraživanje izvršeno. Ovi nalazi se stoga mogu primeniti samo na ispitanike u uzorku, kao i na grad Beograd i Novi Sad, kao turističke destinacije. U budućnosti je poželjno uraditi istraživanje sa većim geografskim okruženjem. Bilo bi veoma korisno ponoviti ovo istraživanje u drugim regionima i gradovima širom zemlje, kako bi se ispitalo da li su atributi potrošnje lokalne hrane identifikovani u ovoj studiji takođe očigledni u drugim regionima.

6. Zaključak

Ova studija je jedna od prvih istraživanja koja je ispitivala potrošnju lokalne hrane u Republici Srbiji među turistima bivših jugoslovenskih republika. Rezultati dobijeni u istraživanju mogu biti korisni lokalnom sektoru koji ima stručnjake za marketing, turističke organizacije i ugostiteljske objekte na turističkoj destinaciji. Osim toga, ovo istraživanje omogućava privrednom i vladinom sektoru da bolje razumeju značaj lokalne hrane, kao deo destinacije, te kako da poboljšaju prihvatljivost kod turista.

Rezultati su pokazali da turisti koji su posetili Novi Sad u nešto izraženijem stepenu pozitivno procenjuju lokalnu hranu, u odnosu na turiste koji su posetili Beograd. Dobijeni podaci mogu poslužiti kao polazna tačka za ulazak u partnerstvo između različitih tržišnih subjekata, odnosno strategiju razvoja lokalne hrane u Beogradu i Novom Sadu. Na primer, saradnja turističkih organizacija i drugih sektora, kako na lokalnom, tako i na regionalnom nivou, mogu preuzeti odgovornost nadzora nad radom kompanija koje se bave hranom u destinaciji. Mogu biti osnovani posebni ograničenja u cilju regulisanja i praćenja rada tih kompanija, otkrivanja neprimerenog ponašanja preduzeća, objavljivanja informacija vezanih za lokalnu hranu i bavljenja pritužbama turista. Praćenje smanjuje nezadovoljstvo i poboljšava pozitivnu evaluaciju lokalne hrane. Istovremeno, ovo takođe može poboljšati ukupno zadovoljstvo turista odabranim destinacijama.

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DIFFERENCES IN THE CONSUMPTION OF THE LOCAL FOOD OF TOURISTS FROM THE FORMER YUGOSLAVIAN REPUBLIC – STUDY CASE BELGRADE AND NOVI SAD

The experience of the tourists at each destination, besides natural and social attractions, is contributed by local food which is the intangible heritage of the destination and represents the culture of the local community. The aim of this study is to examine the differences in the consumption of local food among tourists from the former Yugoslavian republics with respect to the city centres in which they stayed, Belgrade and Novi Sad in the Republic of Serbia. The study was conducted on a sample of 674 respondents. Differences were tested by dual factor analysis of variance and T independent test. This study reports on the research related to the consumption of local food at the destination, the development of urban tourism and the perception of tourists from the former Yugoslavian republics.

Keywords: local food, consumption, former Yugoslavian Republic, Belgrade, Novi Sad

THE ROLE OF A SPORTS EVENT IN CREATING A TOURIST OFFER IN VRNJAČKA BANJA

Tourism has huge and growing importance for the global economy, especially for the economies of developing countries. It represents the leading economic branch in many countries which is confirmed by the revenues they generate. However, there is an increasing emphasis on tourism events and a very large number of trips for satisfaction purposes that are associated with a particular event. Tourism is gaining great importance, but the expectations of tourists are also increasing, as well as their desire for specific experiences. In this way, these events contribute to attractiveness and to drawing tourists to certain places that they perhaps would never visit otherwise. They also have an influence on extending the stay at a destination and contribute to creating a reputation of a particular place, which enriches the tourist experience. The importance of organizing sports events is reflected in the fact that they can significantly affect the tourist offer of the destination. The subject of the paper is to examine the contribution of the organization and management of a martial arts manifestation to the tourist offer of a local community. The aim of the paper is to show that domestic consumption, although small, achieved in organizing such an event represents secure income for the destination.

Keywords: *tourism, events, sports events, visitor, destination.*

1. Introduction

Tourism events are a form of tourism that can contribute to the increase of the scope of tourism demand, especially according to the natural and anthropogenic values of a tourist destination or region. Namely, a man's need to be entertained, have fun, engage in activities, see new areas, habits, customs, make acquaintances, along with changing his living and working environment, has also influenced the

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need to organize various, attractive events as part of a tourist offer of a certain area. Thus, rituals, fairs, manifestations, trade fairs, festivals, exhibitions, sports competitions, congresses, which, with their programs, represent a significant part of the tourist offer, were created. These are events that show various artistic, scientific, economic, sports and other achievements of a place or region, and have a tradition of being held.¹ In this sense events serve not only to attract tourists, but also to help develop or maintain the identity of a community or region.²

Modern trends suggest that tourism and sport are the fastest growing industries in this century. For that reason, sports tourism has become one of the modern megatrends that have been growing in popularity in recent years and is making great profits. Sports events are characterized by creative and complex contents of sports for recreation and entertainment purposes, which take place according to a certain pre-prepared program, and they achieve tourist effects and goals and have socio-economic significance for the place or region where they are held.³ Accordingly, sports events represent a broad social phenomenon of today. They include different activities of organizers focused on the offer of a program, i.e. the games of the sports event organizers for a specific audience with the aim of achieving sports result. We can also observe them in a wider context, where recreation, entertainment, leisure and relaxation are primary, and not achieving sports results.

The event as a conscious and economically oriented human activity appeared a very long time ago with the emergence of ancient civilizations. However, since events cover a broad category, their occurrence is not related to the same time period. The first forms date from ancient times, i.e. six hundred years BC, when a King of China (Sui Yangdi) organized a one-month celebration for the people in his palace, where he gathered 30,000 entertainers who animated the audience; or in the second century BC when emperors of ancient Rome organized gladiator games and other spectacles in order to gain the support of the people (*panem et circenses*).⁴

Sports events have been known since the very beginnings of human civilization. It is known that the first Olympic Games were held in the far 776 BC in ancient Greece, in the temple of the goddess Hera. At the time of the Roman Empire, the sport and Olympic spirit of ancient Greece were replaced by fighting in arenas where, instead of athletes, gladiators fought for life or death. The development of modern sports is related to the year 1884 when the International Congress in Sorbonne took place in Paris and when the International Olympic

¹ Bjeljac, Ž., Štrbac, E. (2004): *Turističke manifestacije na pravcu Dunavsko-moravskog koridora*, Geografski institut Jovan Cvijić, Beograd.

² Read more: Hall, C.M. (1992): *Hallmark Tourist Events: Impacts, Management and Planning*, Belhaven Press, London.

³ Bjeljac, Ž., (2006): *Teorijsko-metodološke osnove manifestacionog turizma*, Ministarstvo za nauku i zaštitu životne sredine, Beograd., p.45.

⁴ Stokar, Ž. (2006): *Menadžment događaja*, Kum, Beograd, p.1.

Committee was formed. Sports and recreational events are sports manifestations of recreational character that can have a certain tourist potential as well. Thus, apart from the sports character, these recreations have cultural, historical, educational, social and tourist significance (direct acquaintance with a place and its natural and anthropogenic tourist values).

The events were probably created even before the appearance of money, but their development was undoubtedly followed after the establishment and acceptance of general equivalence since the non-material character and the conceptual basis of the events were not particularly favorable for natural exchange.⁵ It cannot be said with certainty which event occurred first in the economic sense. What is quite certain is that the economic phenomenon of events dates from the beginning of socially organized human life, but the economic study of the events, and especially of their management aspects, is of a recent date. The development of the events in economic sense also helped to solve the problem of employment of modern labor, and also reflected on the economic growth, primarily of developed market economies. Parallel to the development of contemporary events, their economic role and importance has increasingly been emphasized, which means that events represent a special offer within the service economy. The economic impact of events can be viewed as net economic changes in the local host community, which is the result of spending money that is related to an event.⁶

Today, the organization of events and conventions is an activity that has a turnover of 100 billion dollars and employs approximately 1.5 million people.⁷ The event segment has a high average annual growth rate of around 6% realized primarily because of business events. There are around a million different tourist events in the world today, and according to the data, up to 57% of travels for pleasure is related to a particular event. The management of the event sees tourists as a potential market and tourism as a key stakeholder and partner in achieving the desired success and creating the attractiveness of the event.⁸

In fact, they represent an opportunity for relaxation, a social or cultural experience that is different from everyday activities and experiences.⁹ They also represent one of the most exciting and fastest growing phenomena related to leisure, business and tourism. Thereat, they are clearly open to the public,

⁵ Andrejević, A., Grubor, A. (2007): *Menadžment događaja*, Fakultet za uslužni biznis, Sremska Kamenica, str. 3.

⁶ Crompton, J. (1995): "Economic Analysis of Sports Facilities and Events: Eleven Sources of Misapplication", *Journal of Sport Management*, Vol. 9, No 1, p.14.

⁷ Wagen, L.V., Carlos, B. (2008): *Event management-Upravljanje događajima*, Za turistička, kulturna, poslovna, i sportska događanja, Mate.d.o.o, Zagreb.

⁸ Getz., D. (2008): "Event Tourism: Definition, Evolution, and Research", *Tourism Management*, Volume 29, Issue 3, June 2008, pages 403–428.

⁹ Berridge, G. (2007): *Events design and experience*, Butterworth-Heinemann, Elsevier, Oxford, p.5.

with a central theme and limited by the opening and closing day. In this way, they belong to the most dynamic part of the tourism industry, which calls for applause.¹⁰ Events, both cultural and socio-economic, are creative and complex with certain significance for a place and with various program contents which realize the tourist goals and effects.¹¹ In this way they show carefully created marketing ideas that are implemented through the established protocol in order to provide their participants with a unique, extraordinary, special or specific experience.¹²

The value and attractiveness of the tourist offer of sports events depend on the characteristics of the place and the region in which they are held. The places with a more valuable tourist-geographical position, adequate attractiveness and tourist provisions (special infrastructure, information, supply, entertainment, sports activities, etc.) have more favorable conditions for organizing sports events.

2. Literature Review

In addition to the economic benefits, there are many other benefits for holding sporting events: sports events affect the positive image of the destination, attract visitors who are in that city for the first time, attract visitors who would not come without a sports event, increase visits during the off-season period, and lead to a re-visiting.¹³

A sports event is organized in order to meet the social needs of visitors. Visitors of a sports event do not represent a homogeneous group of people, because they can more or less be bound to the program of a sports event, but also to the actors, i.e. athletes, clubs or national teams. The audience of sports events is layered in terms of affirmation of their program, i.e. identification with the actors or domination in relation to the other group.¹⁴

Organizing great sports events is a very attractive undertaking for most of the major cities. Having the status of a host city usually brings special benefits

¹⁰ Matthew, D. (2008): *Special Event Production*, Elsevier's science, Burlington.

¹¹ Ožegović, S. (1979): "Turističke manifestacije", *Turizmologija – Zbornik stručnih i naučnih radova*, Beograd, br.10, pg. 49-56.

¹² Fermevc, K. (2011): *Značaj organizacije velikih događaja za razvoj turizma*, master rad, Ekonomski fakultet, Univerziteta u Beogradu, p. 4.

¹³ Stone, M., Petrick, J. (2016): "Site Selection Factors for Youth Sport Tournaments", *Tourism Travel and Research Association: Advancing Tourism Research Globally, 2012 TTRA International conference*, p.17, <http://scholarworks.umass.edu/cgi/viewcontent.cgi?article=1813&context=ttra> (10.09.2017)

¹⁴ Kostić, S. (2016): "Modeli planiranja sportskih događaja", *Menadžmenti sport*, Zbornik radova, XI Međunarodna naučna konferencija: *Management, Sport, Olympism*, Beograd, str. 89.

that cannot or should not always be calculated in terms of money. Occasionally, the image is more important, and sometimes it is enough to be in a good company.¹⁵

Figure 1. Classification of sports events¹⁶



The needs of the local population in the field of sports are met in the municipality and in the city as local self-government units, and the means to meet these needs are provided from their budgets and can be used, inter alia: for the construction, holding and use of sports facilities in which the needs in the area of sports are met, in the municipality, or in the city; financing the activities of sports organizations established by the municipality, i.e. the city and the realization of programs, or parts of programs of other organizations contributing to meeting the needs in the field of sports at the level of the municipality or city; organization and holding of sports competitions and events of importance for the municipality or city; providing work conditions for sports professionals in organizations in the field of sports in the territory of the municipality or city.¹⁷

The first step towards a new facility is usually a statement of a team that its existing facilities are „inadequate”. Inadequacy does not usually relate to accommodation, structural integrity or aspects of the event, but to the fact that stadiums that were built more than a decade ago do not include luxurious lodges, club seats, catering facilities and advertising opportunities that generate cash inflows from high-paying fans. In other words, although existing facilities are not physically outdated, they are economically outdated.¹⁸ Numerous studies of travelling sports events have dealt with major events or marking events,

¹⁵ Włodarczyk, B. (2016): “Łódź as an Arena of Grand Sports Events: Selected Examples”, *Tourizm* 2016, 26(1), DOI:10.1515, ISSN: 2080-6922; 0867-5856, p. 49-59.

¹⁶ Bjeljic, Ž., (2006): *Teorijsko-metodološke osnove manifestacionog turizma*, Ministarstvo za nauku i zaštitu životne sredine, Beograd., p.45.

¹⁷ Petrović L., Životić D. (2013): “Uloga i značaj lokalne zajednice za razvoj sporta”, *IX Međunarodna konferencija: Menadžment u sportu, Zbornik radova 1*, str. 218.

¹⁸ Siegfried, J., & Zimbalist, A. (2000): “The economics of sports facilities and their communities”, *The Journal of Economic Perspectives*, 14(3), 95-114.

rather than small events, which can also benefit one region.¹⁹ One of the reasons why interest in maintaining major sports events has grown is that just as they are considered to be useful for selling all kinds of commercial products, they are also considered valuable promotional opportunities for cities and regions, representing their attractions to the global audience and helping to attract tourism and foreign investment.²⁰

When a sports event is transformed into a tourist product, the ranking of a given event is very important because it allows an estimate of its size and through that the number of potential tourists (supporters) interested in coming to a given city.²¹ In the practice of managing sports events, the situations in which organizers meet the needs and requirements of all visitors are rare. Organizers achieve the goals of a sports event in meeting the needs, demands and expectations of a precisely determined segment of the sports market. Generally speaking, the goals achieved in the market segment can be divided into two basic groups: the profit goals of a sports event and non-profit, i.e. sports goals.²² All decisions made by an organization should be recognized as fair and equitable to all or they will have a negative impact on the community. In a study of judges, for example, the judges were very concerned about whether they were treated fair in terms of the quality of the games they were assigned, of the distance to the venue and of partners assigned to them. When they thought they were treated fairly, the community was strengthened. When they felt they were not treated fair, the community was strongly subdued and people felt outraged and angry. This means that all decisions made by the organization should be recognized as fair and equitable to all or they will have a negative impact on the community. One of the more interesting findings in terms of community research in sport is the role of competition in building a community. While some people might argue that the competition is limited to sports, it is also possible that it can be used in non-sport related conditions to build a sense of community.²³

¹⁹ Stone, M., Petrick, J. (2016): "Site Selection Factors for Youth Sport Tournaments", *Tourism Travel and Research Association: Advancing Tourism Research Globally, 2012 TTRA International conference*, p.17, <http://scholarworks.umass.edu/cgi/viewcontent.cgi?article=1813&context=ttra> (10.09.2017)

²⁰ Horne, J. (2007): "The four 'knowns' of sports mega-events", *Leisure studies*, 26(1), 81-96.

²¹ Włodarczyk, B. (2016): "Łódź as an Arena of Grand Sports Events: Selected Examples", *Tourizm2016*, 26(1), DOI:10.1515, ISSN: 2080-6922; 0867-5856, p. 49-59.

²² Kostić, S. (2016): "Modeli planiranja sportskih događaja", *Menadžmenti sport, Zbornikradova, XI Međunarodna naučna konferencija: Management, Sport, Olympism*, Beograd, str. 89.

²³ Warner, S., Dixon, M. (2016): "Connecting It All: Creating Community in Sport and Entertainment", *Sport & Entertainment Review*, 2016, 2 (20) p.45-50, <http://thescholarship.ecu.edu/bitstream/handle/10342/6063/warner%20dixon%202016%20connecting%20it%20all.pdf?sequence=1&isAllowed=y> (10.10.2017)

3. Methodology

For the purposes of this paper, a survey was conducted on the attitudes of sports workers and athletes about the sports tourism of Vrnjačka Banja. A total of 21 polls were collected. All respondents are participants in a boxing competition, specifically the regional round of the Šumadija League, which was held this time in the sports hall "Vlade Divac" in Vrnjačka Banja. According to the rules of the international boxing federation "AIBA" (Association Internationale de Boxe Amateure), for holding a boxing competition, in addition to competitors or "boxers", competing in 10 to 13 weight categories depending on the age, and their coaches, other participants are also needed which are necessary for holding matches, consisting of: a minimum of five scoring judges, one referee in the ring, a timekeeper, a supervisor of the competition, a doctor, a computer operator, a speaker, a cameraman, a photojournalist and, of course, an audience. All the mentioned participants of this competition were questioned, answering eight questions of the closed type, based on which we attempted to get the answers related to the hypotheses. In the third regional round of the Šumadija league, according to the data obtained from the organizer of the Goč Boxing Club competition, 32 competitors from 9 different clubs took part, aside from the aforementioned host club. At this sports event, 60 spectators attended according the same data source.

Table 1 presents the social demographic characteristics of the respondents. In it, in the first column the status of the participants in the competition is entered; the second column lists the gender of the participants; in the third column the age structure of the respondents is presented, and the fourth column lists their working status in private life. Most respondents are male, and only two women were questioned and they both participate as competitors in this round of the Šumadija league. It can be seen that competitors comprise the largest number of participants who answered the questions asked. They also make the largest number of participants in the entire event, not including the audience. They are, on average, the youngest among respondents with an average of 16.5 years and are mostly pupils and students. The second largest group were the judges, who have an average of 43 years and are mostly employed. The oldest among the respondents are coaches with an average of 50.4 years. The survey also included the supervisor of the competition and the doctor on duty. The surveyed participants in the regional round of Šumadija in Boxing are 35.95 years old on average and their working statuses are as follows: 8 employees, 1 private entrepreneur, 4 pensioners, 3 students, 4 pupils and only one unemployed person.

Table 1. *Characteristics of respondents*

	PARTICIPANT	GENDER	AGE	EMPLOYMENT STATUS
1.	Competition supervisor	male	66	Pensioner
2.	Doctor	male	35	Employed
3.	Judge	male	69	Pensioner
4.	Judge	male	61	Employed
5.	Judge	male	37	Employed
6.	Judge	male	37	Employed
7.	Judge	male	33	Employed
8.	Judge	male	21	Student
9.	Coach	male	71	Pensioner
10.	Coach	male	58	Pensioner
11.	Coach	male	50	Employed
12.	Coach	male	39	Entrepreneur
13.	Coach	male	34	Employed
14.	Contestant	male	26	Employed
15.	Contestant	female	24	Student
16.	Contestant	male	19	Student
17.	Contestant	male	18	Unemployed
18.	Contestant	male	18	Pupil
19.	Contestant	female	14	Pupil
20.	Contestant	male	13	Pupil
21.	Contestant	male	12	Pupil

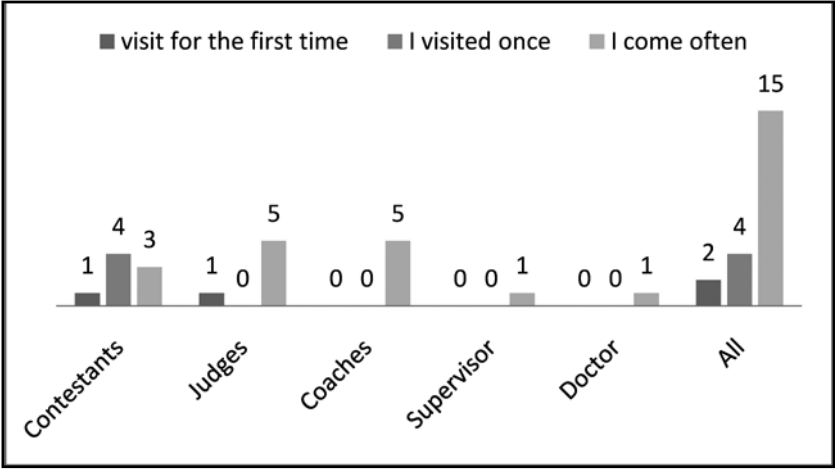
Source: Author's own research work

All respondents are participants of this competition and form its integral part, so it can be said that they represent the minimum number of participants in a boxing event.

4. Results

When asked whether they were visiting Vrnjačka Banja for the first time, 15 respondents answered that they often came, 4 respondents had visited it once before, and only 2 of them were visiting this tourist place for the first time. The supervisor, the doctor, all the examined coaches and most of the judges often visit Vrnjačka Banja, only the competitors said that they had visited it once before.

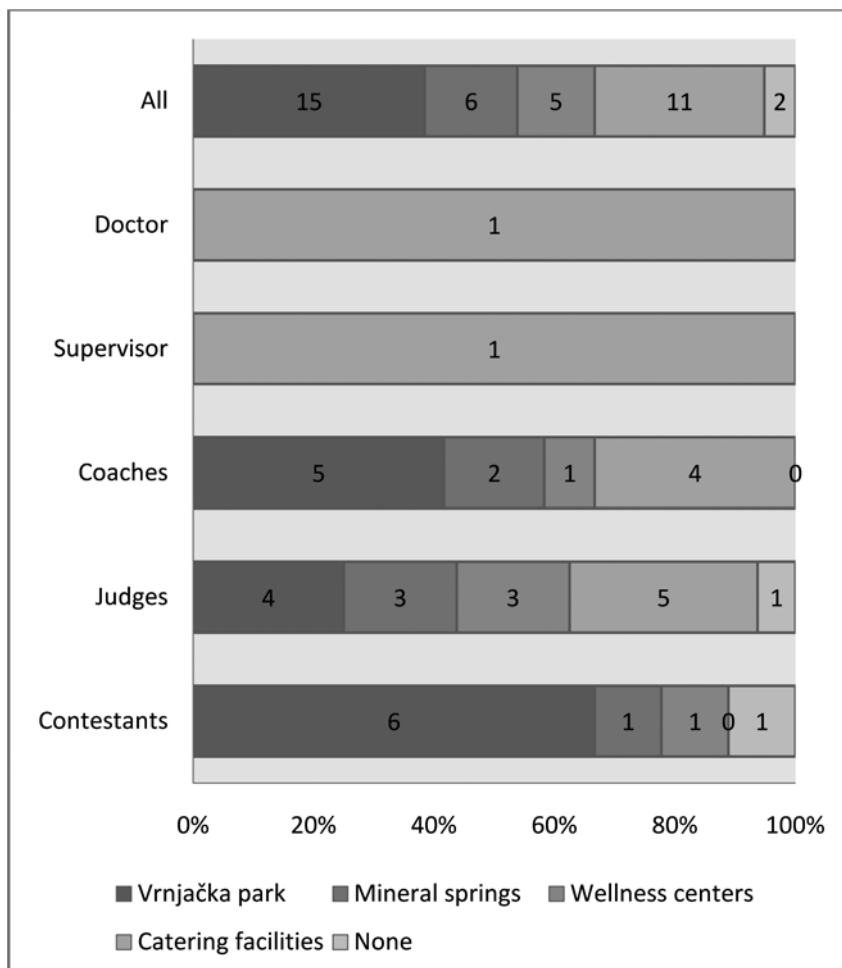
Chart 1. Structure of the answer to the question “Is this the first time you have visited Vrnjačka Banja?” presented as the bar chart.



Source: Author’s own research work

When asked whether they had visited other places in Vrnjačka Banja, 15 respondents answered that they had had a walk through the park of Vrnjačka Banja, 6 respondents visited mineral springs, 5 visited the Wellness centers, 11 visited the catering facilities, while 2 respondents answered that they have only stayed in the sports hall. The Vrnjačka Banja Park was mostly visited by competitors, coaches and judges. The catering facilities were mostly visited by judges and coaches.

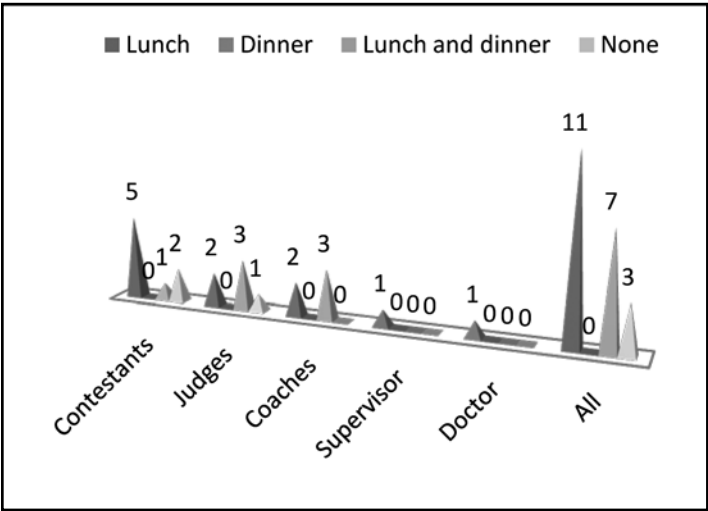
Chart 2. The structure of the response about a visit to a place other than the sports hall is represented as the bar chart.



Source: Author's own research work

When asked whether they had lunch or dinner in Vrnjačka Banja, 11 respondent participants answered that they did have lunch, 7 had two meals, while 3 of them did not have any meals in Vrnjačka Banja. The competitors, the supervisor and the doctor answered that they had lunch, while the coaches and judges had lunch and dinner. Two competitors and one judge did not have any meals in Vrnjačka Banja. No one of the respondents had dinner as the only meal.

Chart 3. The structure of the answer to the question about lunch and dinner during the stay is presented as the bar chart.



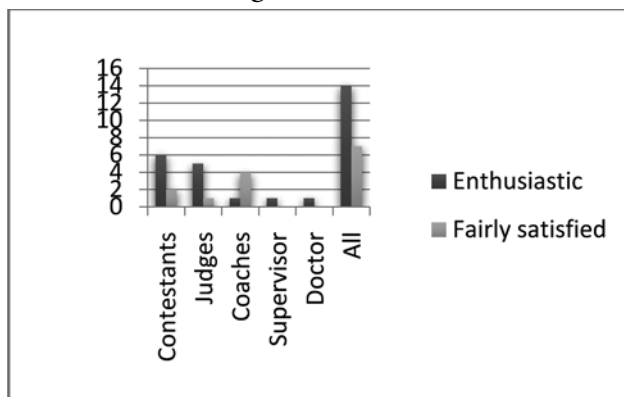
Source: Author's own research work

When asked whether they visited cafes or restaurants in Vrnjačka Banja, one contestant and one judge gave a negative answer, the remaining 19 responded positively.

When asked whether they bought something during the stay in Vrnjačka Banja, 9 respondents answered that they did not buy anything; the other 12 bought one or more products. Most of them bought a souvenir, clothing articles (shoes, clothes, sports equipment...) two of them had bought something else, while jewelry (gold, costume jewelry, a watch...) was bought only by one person. The contestants generally did not buy anything, and only one of them bought a souvenir. The judges bought clothes and souvenirs, while two of them did not buy anything and one replied that he had bought something else. As far as the coaches are concerned, each of them bought something, and most of them bought souvenirs. The supervisor of the competition bought a souvenir and the doctor bought clothes.

When asked whether they liked Vrnjačka Banja, none of the respondents answered negatively, 14 were delighted with Vrnjačka Banja, while 7 were quite satisfied. 6 competitors were delighted by this tourist destination, as well as 5 judges, a coach, the supervisor and the doctor. 4 coaches, 2 competitors and 1 referee were quite satisfied.

Chart 4. *Structure of the answers to the question «Did you like Vrnjačka Banja?» is presented as the bar diagram.*



Source: Author's own research work

The conducted analyses confirm that Vrnjačka Banja is a well-known and visited tourist place, i.e. that a greater number of respondents have already been to the most visited spa in Serbia. A small number of respondents visited it for the first time, precisely due to this sports event. Most enjoyed the natural beauties of Vrnjačka Banja, walking along the spa park and the promenade, and using catering services. The conducted survey confirms that sports events can attract a certain number of visitors, which is very important if events are organized out of season so that the tourist demand during all the months throughout the year is evenly distributed. A more professional approach to organizing events is needed in order for a particular community to create its identity, attract visitors and make significant revenues.

When asked whether the current stay would affect visiting Vrnjačka Banja again, all respondents replied that they would come to visit the spa privately next time. Furthermore, they will also recommend Vrnjačka Banja to their relatives, friends and neighbors which will create a positive image with potential tourists about «the queen of spa tourism» in Serbia.

5. Conclusion

Holding sports events has an evident impact on Vrnjačka Banja. The obtained data of the survey, which was processed for the purposes of this paper, shows on participants of the boxing competition that the majority of the respondents, apart from participating in the organization of the competition, use their time to visit Vrnjačka Banja Park and catering facilities, while making certain tourist expenditures. However, given the fact that the capacity of the sports center

Vrnjačka Banja, the capacity of the sports hall "Vlade Divac" is 1300 seats, it can be said that 60 spectators at the regional boxing round of Šumadija are a very 'poor' audience.

We can conclude that a strategic approach is needed for this activity, because of the positive effects of events that tourists bring by visiting exceed their economic benefits, leading to the strengthening of social capital, the development of the region and a significant improvement in the quality of life of people in these areas. Due to the lack of other tourist attractions in the off-season, events represent the fastest and most cost-effective way of building image and creating demand in these areas. However, the reliance of many municipalities on manifestation tourism as the main source of income has conditioned the emergence of numerous events and festivals. Still, enormous competition and saturation of the market have led to failure, with the key factors of it being: lack of financial resources, inadequate promotion, inadequate strategic planning and incompetence of personnel for this tourist product. For this reason, it is necessary to improve the quality of the events in terms of originality, attractiveness and content with the aim of achieving a competitive advantage.

The conducted analysis shows that the local tourist communities have realized that they cannot rely solely on what nature has given them, but that the specifics of their region should be presented with interesting events. However, the most common role of organizers of events in our country belong to local communities whose members are often not qualified, leading to numerous problems at all stages of development of the events. Therefore, it is necessary to deal with the management and development of the events while preserving the authentic characteristics of the site.

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ULOGA SPORTSKOG DOGAĐAJA U KREIRANJU TURISTIČKE PONUDE VRNJAČKE BANJE

Turizam ima veliki i rastući značaj za globalnu ekonomiju, naročito za ekonomije država u razvoju. On predstavlja vodeću privrednu granu u mnogim zemljama i to potvrđuju prihodi koje one ostvaruju. Međutim, sve se više ističe turizam događaja i veoma veliki broj putovanja proisteklih iz zadovoljstva, a koja su povezana sa određenim događajem. Turizmu se pridaje veliki značaj, ali i očekivanja turista su sve veća, kao i njihova želja za specifičnim doživljajima. Na taj način doprinose atraktivnosti i privlačenju turista u određena mesta koja možda nikada ne bi posetili. Takođe, utiču na produžetak boravka u destinaciji i doprinose kreiranju imidža određenog mesta čime obogaćuju turistički doživljaj. Značajnost održavanja sportskih manifestacija ogleda se u činjenici da one mogu uticati na turističku ponudu destinacije. Predmet rada je sagledavanje doprinosa pri organizovanju i održavanju manifestacije borilačkih veština na turističku ponudu lokalne zajednice. Cilj rada jeste da ukaže da domaća potrošnja koja se ostvaruje pri organizovanju jednog ovakvog događaja predstavlja sigurne prihode destinacije.

Ključne reči: turizam, događaji, sportske manifestacije, posetilac, destinacija.

CORRUPTION AS A JEOPARDIZING FACTOR OF HEALTH CARE SYSTEM DEVELOPMENT IN THE REPUBLIC OF SERBIA***

The main problem of the research in this paper is the corruption in the health care system of Republic of Serbia, with a focus on criminal offenses against official duty, viz. criminal offenses under Article 367 and 368 of the Criminal Code of Republic of Serbia: bribery committed by health workers. The subject of the paper is the research of the corruption as a jeopardizing factor for the development of the health care system. The objective of the paper is to acquire adequate, scientific and social knowledge of various forms of corruption and mechanisms that the state authorities should use in the combat against this type of threat to society as a whole. Health care refers to the organized and comprehensive activity of the society whose aim is to achieve the highest level of preserving the health of citizens and families. Therefore, the main hypothesis in this study is that a higher level of corruption in the health sector means a lower level of health care in society. In other words: the poorer the quality of the health care, the slower the economic development of society will be. What is particularly emphasized in the paper is that the combat against corruption in the health care system is one of the conditions for the EU Accession. The data in this paper have been obtained through content analysis of the documents by associations of patients, judicial bodies and other organizations related to corruption in the health care system of the Republic of Serbia.

Keywords: Corruption, Health care system, Economic development, receiving Bribes, giving Bribes, a Patient.

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1. Introduction

Corruption as a negative social reality has been present throughout the history of human society. It has always been the subject of study from a sociological, philosophical and legal aspect. From Ancient Greece to the present day, many thinkers have considered corruption as the deterioration of governments and social values, as well as the decline of the moral values.

Contemporary definitions of corruption can be classified as¹:

- Administrative definition of corruption – corruption is a deviate behavior of an individual in relation to the formal role;
- Economic definition of corruption – corruption is getting maximum profit by violating laws and moral;
- Public – Interest definition of corruption – using public utilities for personal interests;
- From a criminological aspect, an acceptable definition might be: corruption is a criminal behavior in which the assigned authority is misused for the purpose of personal gain².

Particular weight in deviant behavior of an individual, from a moral point of view, is the corruption in the health care sector. Primarily because it additionally worsens the condition of patients and their families.

It is important to mention the aspirations of the Republic of Serbia for the EU membership, primarily for economic development that would be the basis for the development of the entire society. One of the most important conditions that Serbia needs to fulfill is to reduce corruption in all social systems, particularly in health care system. Undeveloped or underdeveloped countries are a fertile ground for the development of corrupt activities.

Therefore, it is very important to create social opportunities and intergovernmental relations that will contribute to the fulfillment of the conditions for the EU accession.

2. Health care system

Health care in the Republic of Serbia is regulated by the Law on Health protection³. Health care refers to the organized and comprehensive action of the society whose aim is to achieve the highest level of health preservation of citizens and families, and includes the implementation of measures to preserve

¹ Government of Republic of Serbia, Anti-Corruption Council, the official website.

² Ignjatovic, Dj. (2011): *Criminology*, Dosije studio, Belgrade, pg. 112.

³ Law on Health Care: „Official Gazette of RS“, no. 107/05, 72/09- state law, 88/10, 99/10, 57/11, 119 /12, 45/13- state law, 93/14, 96/15 and 106/15.

and improve citizens' health, control and early detection of diseases, injuries and other health disorders, along with timely and efficient treatment and rehabilitation.

Any citizen of the Republic of Serbia or any other person with domicile or residence status in the territory of the Republic of Serbia has the right to health care. Ensuring health care for the population is based on the principles of accessibility, fairness, comprehensiveness, continuity, and permanent improvement of health care quality and efficiency. Health care of the population is carried out at the national level, level of the autonomous region, municipality or city level, or at the level of an employer and an individual.

Health care institution can be established by the Republic, the autonomous region, the local government, natural or legal person, under the conditions stipulated by the Law. It can be established using public or private property resources, unless otherwise specified (institutions that perform emergency medical care, preservation and transplantation of organs and parts of the human body, institutes of blood transfusion and public health, etc. are established exclusively by the state).

Private practice may be established by an unemployed health care worker with professional practice exam and a health worker, the beneficiary of old-age pension. Private practice, as a form of health care service, can be set up as a health office, clinic, laboratory, pharmacy and infirmary. A founder of a private practice has the status of an entrepreneur and self-employed, and is allowed to set up only one form of private practice. Health workers may establish a private practice if they meet the conditions prescribed by the Law on Health care, such as general health ability, university degree or appropriate professional medical school, have passed the professional practice exam, are registered by the competent Chamber of Commerce, or have the appropriate license to operate. Private practice can also be set up and health care activities performed if the conditions in terms of personnel, equipment, facilities and the availability of appropriate types and quantities of medicines and medical devices are met.

Health industry in the Republic of Serbia is carried out at the primary, secondary and tertiary health care level. Management bodies of the health institutions are the Director, Steering and Supervisory Board.

3. Types of corruption in health care system

The most common types of corruption in the health care system in Serbia are:

- demanding money from the patients for the provision of health services, shortening the time on the waiting list for medical examination, diagnostic test and surgery;
- refusing to provide medical services without justifiable medical reasons;

- referring patients from state to private health institutions (the reason is usually inability of state institutions to provide adequate service to the patient);
- prescribing drugs of pharmaceutical companies from which doctors receive a fee or other material benefit;
- wrong doing in drug market and medical equipment market.

a) Receiving bribes

The doctors must not use their medical profession or position in order to acquire illegal material gain or benefit for themselves or for someone else⁴.

Receiving bribes is the most common form of corruption in the health care system in Serbia. Bribe is primarily given in cash, gifts or other benefits. It is a case of criminal offense under Article 367. Paragraph 1 "An official who directly or indirectly solicits or accepts a gift or other benefit, or a promise of a gift or other benefit for himself or another person to perform an official act within his competence, or in relation to his/her official powers that should not be performed, or not to perform an official act that should be performed, shall be punished by imprisonment of two to twelve years⁵."

Receiving bribes is usually done through unlawful mediation. Health workers who make such offenses usually do not personally ask for money, but do the act through another physician or medical personnel.

The best example for this is the final judgment of the High Court in which Z.G., employed as the official orthopedic specialist of the Institute for Orthopedic Surgery "Banjica", was sentenced to a term of imprisonment of 2 (two) years for accepting bribes. Z.G. directly demanded money for himself from the aggrieved party K.M. to perform an official act which he was obliged to do within his official mandate⁶. The mere fact that a long period of time passes from the moment of the offense commitment to the pronouncement of the final judgment (often the procedure is statute-barred) is an aggravating factor in the suppression of such a criminal work.

b) Giving bribes

The biggest problem in solving the problem of corruption in the health care system is caused by the patients themselves. A sick person sometimes does not choose a method and means to solve their health problems. The closest relatives also offer money to ensure successful treatment of their sick family members.

⁴ Code of Medical Ethics of the Medical Association of Serbia, "Official Gazette RS", nos. 104/2016, article 18.

⁵ Criminal code, "Official Gazette of RS", nos. 85/2005, 88/2005 - emendation, 107/2005 - emendation. 72/2009, 111/2009, 121/2012, 104/2013, 108/2014.

⁶ Republic of Serbia, High Court in Belgrade, K.no.760/12.

In that way, they enter into the cycle of corruption in health care, which authoritatively makes them a criminal offender.

Whoever makes or offers a gift or other benefits to an official or other within his official competence or in relation to his/her official powers, perform an official act that he is obliged to perform, or not to perform an official act that he may not perform, or who acts as intermediary in such bribing of an official, shall be punished by imprisonment up to three years⁷.

Analyzing the research results, it can be concluded that a bribe-giver lacks awareness that by giving a gift or doing a favor, they actually make a serious crime.

c) Refusal to provide health services

This is usually the first step that health workers take as a way to influence a patient to agree to some form of corruption, which is often an unavoidable situation for a patient. Refusal to provide medical services can have various forms, and one of them is putting a patient on a waiting list for a long period without any objective reasons, after which a patient decides to give money in order to be examined or medically treated in other way as soon as possible. Also, doctors very often refuse to provide medical services at the workplace in the state health care institutions, making a patient who is concerned about their health to accept a treatment in a private institution. In this case, there are elements of the offense of denying medical assistance, as well as malpractice.

d) Referring patients from state to private institution

This is one of the most prevalent forms of corruption in the health care system of Serbia and very difficult to prove in criminal proceedings. It can be undoubtedly concluded that in this way health workers have built a parallel system of health care. It is a "well-coordinated" system in which a doctor refers the patient to a private health institution run by his colleagues or doctors, who give him money for the "referral". It happens very often that the referred clinic is where the doctor works himself or even owns it. It is a fact that state health institutions are not always able to provide all kinds of services and health care. However, the same offense happens even when state health institutions have the capacity to provide the necessary service. In addition, it happens that physicians refuse to accept the results of laboratory analysis of some private laboratories, and therefore send patients to other laboratories from which they obviously receive money or other material benefits. For the patients, or the "victims" of this form of corruption, doctors have in advance prepared business cards of private health institutions they "cooperate" with. For this type of corruption, the major problem of argumentation in criminal proceedings is patients' consent to

⁷ Criminal Code, "Official Gazette of RS", nos. 85/2005, 88/2005 - emendation, 107/2005 - emendation. 72/2009, 111/2009, 121/2012, 104/2013, 108/2014.

the “recommendation”, when patients want to cure themselves or their family members in the first place, thus becoming part of a parallel health system.

e) Link between health care workers and the pharmaceutical industry

Actions of this type of corruption involve advertising, promotion and recommendations made by a doctor for a medication which is a product of certain pharmaceutical companies, while the doctor receive money or other benefits from that pharmaceutical company. The doctors who insist that patients use certain medications whether they are on the positive list or not make this type of corruption more difficult in particular. In addition, pharmaceutical companies pay conference fees for the doctors’ participation in scientific conferences.

This form of corruption, i.e. the link between health care workers and the pharmaceutical industry, is recognized in the National Anti-Corruption Strategy⁸.

f) Wrongdoing in drug market and medical equipment market

Additional difficulties are made by pharmaceutical companies and manufacturers and retailers of medical equipment. With the purpose of making a profit and achieving commercial interest, they commit a series of “frauds”. Perhaps the most prominent type is offering outdated medical equipment at a cost of modern equipment, with the aim of “emptying the warehouse” and reducing potential costs and losses that could be caused by the impossibility of placing products on the market. Very often, the failure to disclose the actual quality of drugs and their adverse effects makes the problem even more severe.

4. Safeguards against corruption in health care system

It is clear that there is a shortfall in the system. Cases of corruption in the health sector are numerous and daily, while the number of court judgments that condemn health workers is negligible. Therefore, what goes in favor of misuse is the lack of clear procedures and a list of standard services; criteria and procedures for performing additional work, whose cash income does not return to the budget, but is distributed to institutions and their employees (the existence of the so-called institution’s own revenues); imprecisely regulated relation of the pharmaceutical industry in terms of medical practice and training of health care employees; loosely regulated legal conditions that health care staff and associates in state institutions need to fulfill in order to provide health services in private institutions, etc⁹.

⁸ National Anti-Corruption Strategy for period 2013-2018, “Official Gazette of RS”, nos. 57/2013. 3.7. Health a) Description of situation.

⁹ National Anti-Corruption Strategy for period 2013-2018, “Official Gazette of RS”, nos. 57/2013. 3.7. Health a) Description of situation.

The issue of corruption needs to be observed from a security standpoint as well. Given that there is no institutional mechanism for its effective suppression, this phenomenon requires a coordinated and determined response of all security structures in society¹⁰. Additionally, an important mechanism for the combat against corruption in the health care system is the professional work of judicial bodies. However, that is not supported in practice, where justice can be seen as “disorganized box” that excludes the idea of an anti-corruption strategy that can be applied within its walls¹¹. Recognition of the health sector as the primary segment of society will contribute to the development of society as a whole, as well as better regulation of the relations of state bodies. Court proceedings must be resolved urgently in order to emphasize the state readiness to vigorously and decisively combat the problem of corruption in the society, particularly in health care system as its most sensitive part. The experiences of developed countries can be a good example to follow.

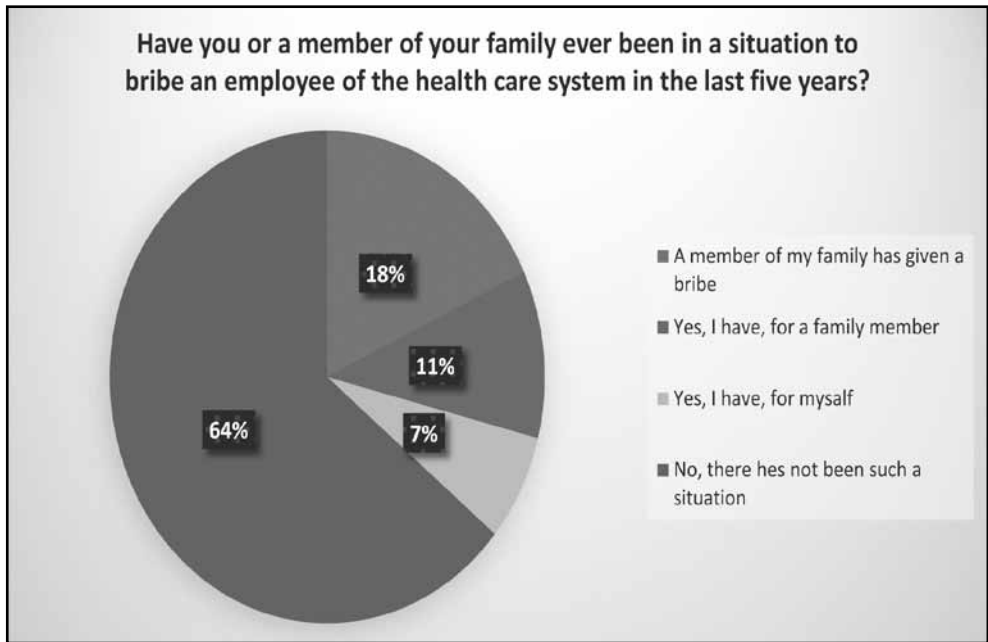
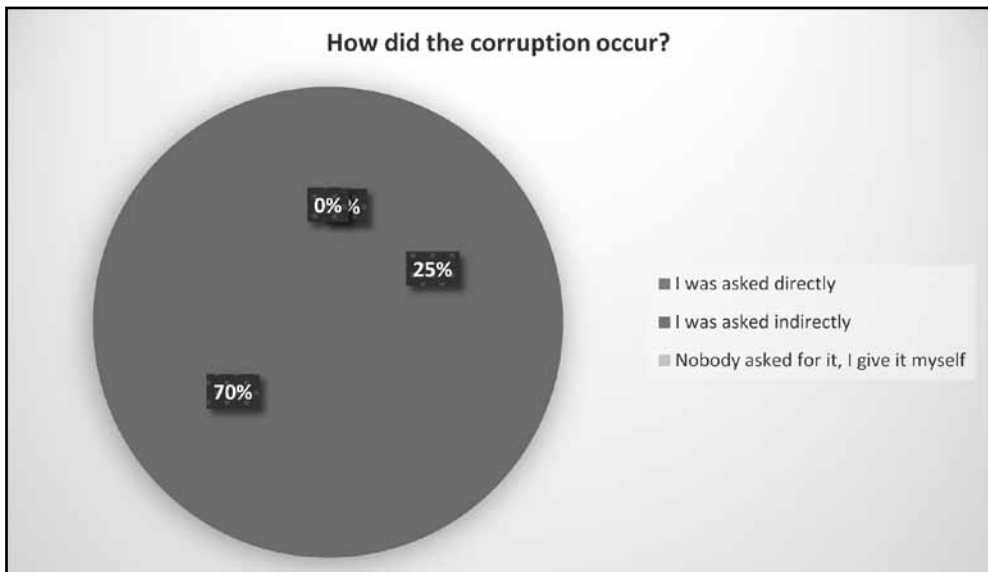
5. Evaluation of research results

Research on corruption in health care was conducted by the Center for Free Elections and Democracy in 2010 on the territory of the Republic of Serbia¹². The results that have been reached allow us to conclude that the existence of corruption is at the level of “rumours”, and that there are no significant direct knowledge and findings of the respondents. Also, a number of respondents who might have been involved in corrupt activities, do not literally consider corruption to be a criminal offense, but rather a symbolic gesture, particularly underlining that they were not under anyone’s, either direct or indirect, pressure. It is interesting that there are no significant differences in responses depending on the age, sex, level of education and material status of respondents. Majority of the respondents think that reporting corrupt activities to the competent authorities is the best way to combat corruption and contribute to its reduction while patients themselves have to report any type of corruption. In addition to customs officers, doctors make the profession which is generally believed to be the most corrupt. Health workers on the other side think that corruption in the health care system is not widespread, and that reasons why individuals resort to corrupt activities should be sought in poor working conditions, primarily in low-income, insufficient to meet basic human needs.

¹⁰ Danilovic, N. (2013): Contemporary security systems, Megatrend, Belgrade, pg. 51.

¹¹ Petrus C. van Duyne, Elena Stocco, Jelena Dimitrijević (2012): *From black box to a transparent public policy*, Victimology Society of Serbia, Belgrade.

¹² Center for Free Election and Democracy (2010): Corruption in Health care.

Chart 1¹³Chart 2¹⁴

¹³ Center for Free Election and Democracy (2010): Corruption in Health care.

¹⁴ Center for Free Election and Democracy (2010): Corruption in Health care.

Chart 3¹⁵

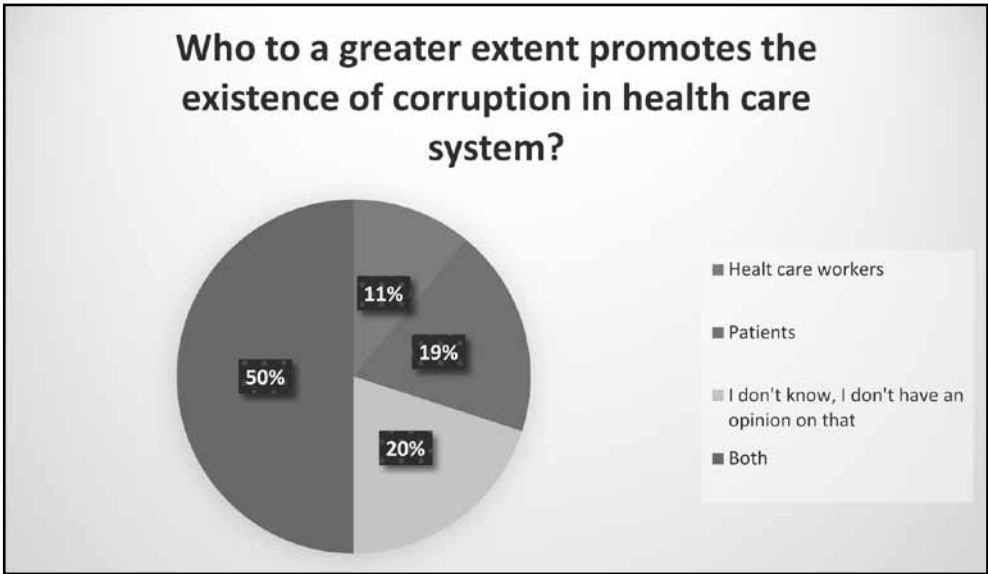
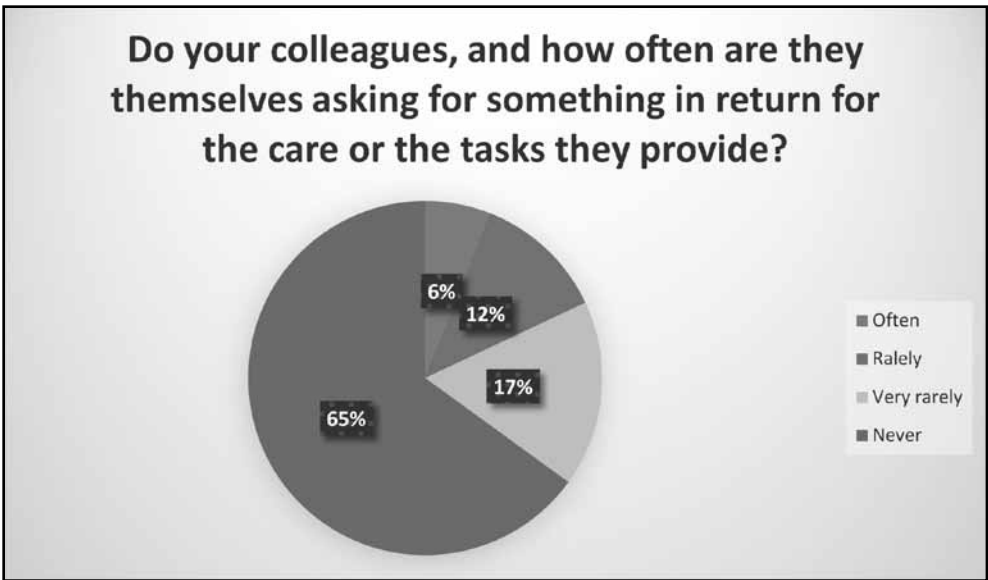


Chart 4¹⁶



¹⁵ Center for Free Election and Democracy (2010): Corruption in Health care.

¹⁶ Center for Free Election and Democracy (2010): Corruption in Health care.

6. Conclusion

Being a health care worker has always been considered to be the most humane profession in the society. Based on numerous indicators, it can be concluded that medical profession in Serbia is for a number of health workers, an opportunity for acquiring material gain, violating basic human values, principles of humanity and above all the law. The consequences of such actions are not only reflected on causing damage to individuals, but also to the society as a whole. In the first place, system corruption in health care makes the path for Serbia into the EU more difficult. The accession of Serbia to the EU would solve the pressing economic problems and enhance the development of the whole society, including the health care system. Further on, it can be concluded that specific types of corruption in the health care system harm the budget of Serbia. Particular damage is reflected in the “takeover” of patients from state health institutions into the private ones. As a consequence, the money that could be used for the development of the health care system is spent for the development of private health care institutions whose owners are mainly corrupt doctors. Finally, poorer level of health care slows down the economic development of the society.

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KORUPCIJA KAO FAKTOR UGROŽAVANJA RAZVOJA ZDRAVSTVENOG SISTEMA U REPUBLICI SRBIJI

Osnovni problem istraživanja u ovom radu je korupcija u zdravstvenom sistemu Republike Srbije, sa težištem na krivična dela protiv službene dužnosti, odnosno krivična dela iz člana 367. i 368. KZ Republike Srbije, primanje i davanje mita počinjena od strane zdravstvenih radnika. Predmet rada istražuje korupciju kao faktor ugrožavanja razvoja zdravstvenog sistema. Cilj rada je sticanje odgovarajućeg, naučnog i društvenog saznanja o pojavnim oblicima korupcije i mehanizmima koje državni organi treba da preduzmu u borbi protiv ovog oblika ugrožavanja društva u celini. Zdravstvena zaštita predstavlja organizovanu i sveobuhvatnu delatnost društva čiji je cilj postizanje najvišeg mogućeg nivoa očuvanja zdravlja građana i porodice. Prema tome, veći nivo korupcije u zdravstvu, znači manji nivo zdravstvene zaštite u društvu. Odnosno, ukoliko je stepen zdravstvene zaštite lošiji, utoliko je ekonomski razvoj društva usporeniji. Posebno je važno istaći da je borba protiv korupcije u zdravstvenom sistemu jedan od uslova za pridruženje EU. Podaci u istraživanju su prikupljeni od strane udruženja pacijenata, pravosudnih organa i drugih organizacija.

Ključne reči: korupcija, zdravstveni sistem, ekonomski razvoj, primanje mita, davanje mita, pacijent.

LINK BETWEEN BOARD STRUCTURE AND NATIONAL CULTURE: A COMPARATIVE ANALYSIS

As a result of the separation of ownership from control and relationship between the owners as principals and managers as agents, the so-called agency problem arises. In order to alleviate the agency problem in transition economies, internal corporate governance mechanisms are applied. Culture is considered as one of the most important factors within an informal institutional framework that is often associated with the effectiveness of corporate governance mechanisms. Starting from the fact that the board is an important internal mechanism, this paper examines the national culture as a determinant of the board structure based on a widely accepted cultural framework developed by Geert Hofstede. The aim of the research is to obtain relevant scientific knowledge on whether the board structure, analyzed through board composition and size, differs in countries that have similar dimensions of national culture. The research is carried out on a sample of 60 companies in Serbia and Montenegro. Relying on the T-test, the research showed that the boards composition in these countries differs, while their average size is the same. This pilot study mitigates the research gap that exists in domestic literature and represents the basis for future research in this area.

Keywords: corporate governance, corporate governance mechanisms, national culture, board structure

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1. Introduction

Along with the development of corporations, there is a separation of ownership from control due to delegation of management rights from owners to managers. When managers make decisions in the interests of the owners, the latter will benefit. Otherwise, when there is opportunistic behavior of managers, a conflict of interest between owners (principals) and managers (agents) arises.¹ In order to resolve this conflict, different corporate governance mechanisms are applied, which are classified in the literature in two basic groups of mechanisms: internal mechanisms, which refer to the ownership structure and the board of directors, and the corporate control market and institutional framework as external mechanisms.² Due to the insufficiently developed corporate control market, the internal mechanisms of corporate governance are particularly important for transition countries. According to the agency theory, the basic role of the board as an internal mechanism is to monitor and control the managers in order to protect the interests of the owners. Thus, it is one of the basic research issues on which the board effectiveness depends.

Although there is a body of empirical research, partial research on the board effectiveness does not generally include the institutional context in which the research is conducted. Starting from the need to reduce this gap, the paper focuses on the board as an internal mechanism that depends on the institutional framework. The theoretical basis of research is institutional theory as one of the contemporary theories of corporate governance. From the perspective of institutional theory, companies are seen as social entities integrated into an institutional framework that identifies formal and informal standards on the organizational structure, including board structure³ that reflects the national culture in which the organization operates.⁴

Culture is considered to be an important factor within the informal institutional framework and for that reason it can be assumed that the board structure is related to the dimensions of national culture. The corporate governance system analyzed through the board structure varies from country to country, from the two-tier board model in the Continental-European

¹ Nikolić Jelena, Babić Verica (2016): "Zaštita interesa investitora kao faktor unapređenja konkurentnosti privrede", *Zbornik radova Unapređenje konkurentnosti privrede Republike Srbije*, 206.

² Babić Verica, Nikolić Jelena, Stanisavljević Milena (2016): "Corporate governance mechanisms effectiveness: the case of transition countries", *Facta Universitatis*, 13/2, 4.

³ Li Jitao, Harrison J. Richard (2008a): "National Culture and the Composition and Leadership Structure of Boards of Directors", *Corporate Governance: An International Review*, 16 /5, 377.

⁴ Humphries A. Sarah, Whelan Catherine (2017): "National Culture and Corporate Governance Codes", *Corporate Governance: The International Journal of Business in Society*, 17/1, 152.

countries to the one-tier board model in the Anglo-Saxon countries. Mark Roe (1994) considers these variations as a result of differences in national culture⁵. Nevertheless, in literature emphasis is placed on the analysis of the impact of the legal and political framework on the ownership and control, while little attention is paid to the analysis of the influence of national culture and its dimensions on the board structure. Therefore, because research in transitional economies related to this problem field is limited, and in Serbia in particular, where to the best of the authors' knowledge no such research has yet been conducted, this study fills the gap in the literature.

Starting from the above mentioned, a pilot study was conducted to examine the impact of the dimensions of national culture on the board structure in Serbia and Montenegro. In fact, the aim of the research is to examine whether the board structure is the same in the countries that have the same dimensions of national culture. The research starts from the widely accepted cultural framework developed by Geert Hofstede, in which he identified four dimensions of culture: uncertainty avoidance, individualism/collectivism, power distance and masculinity/femininity.⁶ The obtained results concerning the link between the national culture and the board structure are the basis for carrying out comprehensive research in order to draw conclusions about the impact of dimensions of national culture on the board structure. In line with the purpose of the research, the work consists of the following parts: in the first part of the paper, an overview of previous research is carried out which examines the impact of the dimensions of national culture on the board structure; the second part describes the methodology used in the research; based on the secondary data and by using descriptive statistics and the T test, research results are presented in the third part of the paper; the final part of the paper presents concluding remarks, points to the research limitations and gives directions for future research.

2. Literature review

Scott states that every organization, as a social system, operates as part of an institutional environment that determines social reality.⁷ Institutional environment viewed as a set of formal and informal institutions is variable and consists of many different factors that have a significant impact on the characteristics of the organization. A formal institutional framework, through the definition of norms related to the board structure, shapes a corporate governance

⁵ According to: Lubetsky H. Michael (2008): "Cultural difference and corporate governance", *17 Transnat'l L. & Contemp. Probs*, 187/2008, 189.

⁶ Hofstede Geert (1983a): "National cultures in four dimensions: A research-based theory of cultural differences among nations", *International Studies of Management & Organization*, 13/1-2, 46.

⁷ Scott W. Richard (1987): "The adolescence of institutional theory", *Administrative science quarterly*, 32/4, 507.

system. An informal institutional framework also plays a significant role through cultural elements such as symbols, cognitive systems and normative beliefs. Based on the above, the corporate governance system is influenced not only by formal institutions, but also by national culture, as an informal institutional framework.⁸

The notion of culture has been widely studied in the literature and defined in different ways. The generally accepted definition of culture was given by Geert Hofstede, who defines culture as 'a collective programming of the mind that distinguishes members of one group of people from others.'⁹ Different frameworks have been developed for the study and understanding of national culture, but it is certainly the most widely used framework defined by Hofstede, which includes four dimensions: uncertainty avoidance, individualism/collectivism, power distance and masculinity/femininity.¹⁰ To this model Hofstede added two more dimensions - short-term/long-term orientation and indulgence/restraint.¹¹ In this research, the first four dimensions are analyzed.

Uncertainty avoidance refers to the extent to which a society feels fearful about uncertain situations and in which it tries to avoid such situations by setting formal rules without tolerating different ideas or behaviors and believing in absolute truth.¹² According to this dimension, societies can be characterized as those with a low degree of uncertainty avoidance, in which individuals prefer to take risks, tolerate differences, do not feel upset about the existence of uncertainty and have a natural tendency to feel safe, whereas those with a high degree of uncertainty avoidance in which individuals try to win the future, feel anxiety and nervousness, as well as trying to create security and avoid risk.¹³

The power distance shows the degree to which society accepts the fact that power in institutions and organizations is unequally distributed.^{14,15} Societies can have a high power distance when they allow inequalities in society to grow

⁸ Li Jitao, Harrison J. Richard (2008b): "Corporate governance and national culture: a multi-country study", *Corporate Governance: The international journal of business in society*, 8/5, 612.

⁹ Hofstede Geert (1994): "The business of international business is culture", *International business review*, 3/1, 1.

¹⁰ Hofstede Geert (1983a), 46.

¹¹ Hofstede Geert (2011): "Dimensionalizing cultures: The Hofstede model in context", *Online readings in psychology and culture*, 2/1, 8.

¹² Hofstede Geert (1980): "Motivation, leadership, and organization: do American theories apply abroad?", *Organizational dynamics*, 9/1, 45.

¹³ Hofstede Geert (1983b): "The cultural relativity of organizational practices and theories", *Journal of international business studies*, 14/2, 81-83.

¹⁴ Hofstede Geert (1980), 45.

¹⁵ Mintz M. Steven (2005): "Corporate governance in an international context: Legal systems, financing patterns and cultural variables", *Corporate governance: an international review*, 13/5, 587.

in terms of power and wealth, and when they tend to reduce these differences as much as possible, they are characterized by a low power distance. Individualism/collectivism is a dimension that explains the relationship between individuals and groups and refers to the degree of integration of individuals into groups.¹⁶ In fact, differentist cultures are distinguished in which individuals strive for autonomy and independence, and collectivist cultures in which individuals maintain strong ties to their primary groups. Masculinity/femininity refers to the dimension of culture that shows the distribution of dominant values in a society among the sexes.^{17 18} In societies where there is a dominance of masculinity, the emphasis is on the existence of gender differences, ambition, the acquisition of wealth, aggressiveness, while societies with dominant femininity emphasize the importance of establishing good relationships, caring for harmony and quality of life, modesty.

A particularly important aspect in research dealing with the board effectiveness is to examine the impact of different dimensions of national culture on the board structure. The board role is to ensure that managers act in the interests of owners and key stakeholders, and their key responsibility is to provide strategic orientation of the corporation and supervise and control the management.¹⁹ Numerous studies of corporate governance have studied the role and structure of the board of directors from different perspectives, resulting in the development of a number of theories concerning corporate governance.²⁰ The board structure is analyzed through the following key characteristics: board composition, leadership structure and board size. Board composition shows the relationship between the number of non-executive, independent directors, and the number of executive directors. Leadership structure is defined as the duality position of the board chairman and CEO (chief executive officer).²¹

The above structural characteristics of the board vary depending on the corporate governance model. A unitary board or one-tier board is the form of board structure common in the UK and the USA. This means that the functions

¹⁶ Hofstede Geert (2011),11

¹⁷ Hofstede Geert (1980), 46.

¹⁸ Hofstede Geert (2011), 12.

¹⁹ Babić Verica, Slavković Marko (2016): "Kompetencije i dinamičke sposobnosti upravnih odbora kao faktora razvoja inovativnosti", *Zbornik radova Šestog interkaderskog skupa katedri za menadžment zemlja Jugoistočne Evrope i naučne konferencije: Savremeni preduzetnički menadžment i organizacija u digitalnoj eri u zemljama u tranziciji: prepreke i mogućnosti*,237.

²⁰ Kiel C. Geoffrey, Nicholson J. Gavin (2003): "Board Composition and Corporate Performance: how the Australian experience informs contrasting theories of corporate governance", *Corporate Governance: An International Review*, 11/3, 3.

²¹ Babić Verica, Nikolić Jelena, Erić Jelena (2013): "Board Structure and Corporate Performance: Traditional vs. Contemporary Approach",52, in: Babić Verica (ed.): *Contemporary Issues in Economics, Business and Management*, Kragujevac.

of management and control are unified and assigned to one single board, which is composed of both executive and non-executive, independent members. The board is elected by the shareholders, and board members play a key role in corporate governance. Although the board size is not legally limited, according to the Corporate Governance Code, large companies should have at least half of the non-executive, independent directors, while small companies must have at least two non-executive directors.²² The Anglo-Saxon unitary board model is characterized by a dual leadership structure, which implies the duality position of the board chairman and CEO.

Unlike the Anglo-Saxon board model, a dual or two-tier board implies the separation of management and control functions, which is typical of the Continental Europe.²³ The two-tier or dual board consists of two separate boards - the supervisory board and the management board. The main characteristic is that members of the management board are not allowed to be members of the supervisory board at the same time.²⁴ The supervisory board is composed of external, non-executive members. It has the task of monitoring the managers and taking care of the long-term development of the company. Its responsibilities include the appointment and dismissal of the members of the management board, advising, supervising and controlling the management board, as well as the ratification of strategic decisions. The management board consists of executive members, which has no right to become involved in the work of the supervisory board. The members of the management board are appointed by the supervisory board. The management board is responsible for conducting business and representing companies. In line with above mentioned, the roles and responsibilities of supervisory and management boards are separated - the management board manages the company, and the supervisory board oversees the direction of the business. With this model, the duality leadership structure is not allowed, which means that the general manager can not be the chairman of the board at the same time.²⁵

Although there are differences in the board models, the board composition, the board size and the leadership structure are the basic structural characteristics which determine their effectiveness. Considering the board importance, numerous researches have been studying the board characteristics depending on the dimensions of the national culture. Many of them point to the importance of the independence of directors, gender, education, ethnic origin. The heterogeneity of the board can be viewed as a consequence of the influence of Hofstede's dimensions of national culture. Cimerova et al. found that differences

²² A. Christine (2012): *Corporate Governance*. Oxford University Press Inc., New York, 162-163.

²³ Mallin A. Christine, 15.

²⁴ Babić Verica, Nikolić Jelena (2016): "Key factors of corporate governance model development in transition economies", *Teme*, 2, 751.

²⁵ Mallin A. Christine, 216-217.

in individualism and collectivism, as well as the dominance of masculinity, had a negative impact on the board effectiveness.²⁶ Oostveen et al. have proven that power distance, masculinity and uncertainty avoidance, as a dimension of national culture, affect gender representation on board.²⁷ Therefore, gender-based behavioral differences between males and females may lead to differences in board effectiveness.

In a survey on a sample of 399 multinational companies from 15 countries of a different cultural environment, Li and Harrison have confirmed that all dimensions of national culture have a significant impact on the board composition and leadership structure.²⁸ The research is based on the results of earlier conducted studies, such as Hill, which emphasize that group performances are quantitatively and qualitatively superior to the performance of individuals.²⁹ In favor of this we can emphasize that different individuals have different learning capacities and cognitive influence on other team members, which makes the groups more capable of solving complex problems. On the basis of the obtained results, the authors assume that a larger number of external members with different knowledge and experience will contribute to the board effectiveness. Also, starting from research conducted by Boyd³⁰, Li and Harrison point to significant positive influence of the CEO duality on performance. They concluded that uncertainty avoidance and individualism positively influence the board structure with a larger number of external members and CEO duality, as well. Therefore, they state that masculinity and high power distance are associated with a smaller number of external members, but they also affect the CEO duality.

The same authors investigate the influence of dimensions of national culture on the board size and leadership structure on the same sample as in the previous survey. The results of this study are consistent with the previous ones in terms of the impact of high power distance, individualism and masculinity on CEO duality, but differ regarding uncertainty avoidance impact.³¹ They show that this dimension positively affects the separation of chairman and CEO roles. Concerning the board size, research shows that a high degree of individualism

²⁶ Cimerova Helena, Dodd Olga, Frijns Bart (2014): "The impact of cultural diversity in corporate boards on firm performance", <http://www.nzfc.ac.nz/archives/2015/papers/programme/132.pdf> (16.05.2017).

²⁷ Oostveen van Boris, Dam Lammertjan, Niels Hermes (2014): "Women on Boards of Directors and Firm Performance: Does Culture Matter?", *EFMA23rd Annual Conference*, Tor Vergata – School of Economics, University of Rome, 22-23.

²⁸ Li Jitao, Harrison J. Richard (2008a), 381.

²⁹ Hill W. Gayle (1982): "Group versus individual performance: Are N+1 heads better than one?", *Psychological bulletin*, 91/3, 533.

³⁰ Boyd K. Brian (1995): "CEO duality and firm performance: A contingency model", *Strategic Management Journal*, 16/4, 301-312.

³¹ Li Jitao, Harrison J. Richard (2008b), 618.

encourages small boards with fewer members, while the dominance of masculinity influences bigger boards. However, their starting assumptions that the power distance is linked to smaller boards have not been proven.

Humphries and Whelan point to the significant relationship between Hofstede's dimensions of culture and leadership structure, the board composition by gender, the board independence, and the frequency of board meetings.³² Based on secondary data on corporate governance codes in 55 countries, these authors grouped countries into following groups: the first group, formed by the countries in which corporate governance codes require the boards with a balanced gender structure and diversification, a greater number of independent members, a separate CEO and chairman position, and a regular number of board meetings during the year; and the second group, consisting of the countries that do not regulate the board structure or the frequency of meetings, whose boards have sufficient but not the majority of independent members, and where the separation of the CEO and the board chairman is not required. For both groups, a score was determined for each dimension of national culture, and their impact on corporate governance variables was observed. The results showed that high power distance, masculinity and uncertainty avoidance affect the existence of codes related to board structure, and that all four dimensions influence the requirements for the independent boards. As far as the leadership structure is concerned, only power distance dimension stimulates the duality of positions.

Starting from the results of the above research, and having in mind that corporate governance in transition countries is insufficiently explored, the paper starts from the dimensions of national culture in Serbia and Montenegro characterized by collectivism, high power distance, femininity and uncertainty avoidance^{33 34 35 36} as determinants that shape the board structure. Drawing on the literature review, the starting point is that countries that have the same dimension of national culture also have boards with similar structural characteristics. In accordance with the above, and starting from the fact that the national culture in Serbia and Montenegro is characterized by similar dimensions of national culture, the following research hypotheses have been tested:

H1: There are no statistically significant differences between the board composition in Serbia and Montenegro.

³² Humphries A. Sarah, Whelan Catherine, 161.

³³ Janićijević Nebojša (2003): "Uticaj nacionalne kulture na organizacionu strukturu preduzeća u Srbiji", *Ekonomski anali*, 44/156, 54.

³⁴ Obradović Saša, Rakić Biljana, Šapić Srđan (2011): "Kulturološke razlike kao faktor ekonomskog uspeha", *Ekonomске teme*, 4, 621-622.

³⁵ Krivokapić Nataša, Čeranić Goran (2014): "Dominant Value Patterns in the Montenegrin Society", *Mediterranean Journal of Social Sciences*, 5/13, 205.

³⁶ Jovanović Violeta, Paunković Jane, Stevanović Marija (2017): "Organizational learning for sustainable development – correlation with the national culture dimensions framework", *Megatrend Review*, 14/3, 7.

H2: There are no statistically significant differences between the board size in Serbia and Montenegro.

3. Research Methodology

This pilot survey is based on secondary data on the board structure collected from 30 companies in Serbia listed on the Belgrade Stock Exchange and 30 companies in Montenegro listed on the Montenegro Stock Exchange. Thus, the whole sample includes a total of 60 companies, which fulfilled the requirement regarding the minimum size of the sample for conducting the statistical analysis. In order to achieve the sample diversity and ensure comparability of data collected, the sample included companies in various industries. It is also important to note that, in order to harmonize the sample, only companies with unitary board are studied, given the fact that there can be unitary and dual boards in companies in Serbia,³⁷ but that in companies in Montenegro the governance bodies can only be the board of directors and the executive director,³⁸ which means that there are no supervisory boards and therefore neither a dual board model.

In order to empirically test the hypotheses, descriptive statistical analysis and the T test for two independent samples were applied (SPSS 20.0). According to the sample, the number of non-executive members is generally higher than the number of executive members (86.67% of the sample) in boards in Serbia. The boards have most often two non-executive members (70% of the sample), followed by four non-executive members (16.7% of the sample), while a small percentage of the sample is the boards which have three, five and ten non-executive members. Therefore, based on previously explained results, it can be concluded that the boards make a greater number of non-executive, external members.

Another examined characteristic is the board size. When it comes to the number of board members, it has about three members in the majority of companies in Serbia (60% of the sample), followed by boards with five members (20% of the sample), then with seven members (10% of the sample), and finally there are companies with six members or even eleven members. In companies in Montenegro, it can be concluded that there are a large number of external board members in relation to internal ones. Most often there are four (26.7% of the sample), five (33.3% of the sample) and seven external members (16.7% of the sample). Therefore, based on these results, it can be concluded that the boards

³⁷ Zakon o privrednim društvima Republike Srbije, *Službeni glasnik RS*, br. 36/2011, 99/2011, 83/2014 - dr. zakon i 5/2015, čl. 326.

³⁸ Zakon o privrednim društvima Crne Gore, *Službeni list Republike Crne Gore*, br. 006/02 od 08.02.2002, *Službeni list Crne Gore*, br. 017/07 od 31.12.2007, 080/08 od 26.12.2008, 040/10 od 22.07.2010, 036/11 od 27.07.2011, 040/11 od 08.08.2011, čl. 34.

in Montenegro consist of a greater number of non-executive, external members. Regarding the board size, research results show that in most companies, the boards consist of five members (53.3% of the sample), three members (23.3% of the sample) and seven members (23.3% of the sample).

4. Results and discussion

In Table 1, results of descriptive statistical analysis for analyzed companies in Serbia and Montenegro are given. In this table, number 1 signifies Serbia, while number 2 denotes Montenegro. According to the obtained mean values, the average number of external board members in Serbia is 2.76 and in Montenegro is 4.63. Regarding the board size, the values show that the average number of board members in Serbia is 4.36 and 5 in Montenegro.

Table 1. *Descriptive statistics for composition and size of board of directors*

Board characteristics	Country	N	Mean	Std. Deviation	Std. Error Mean
Non-executive	1	30	2,7667	1,63335	,29821
	2	30	4,6333	1,40156	,25589
Size	1	30	4,3667	2,07586	,37900
	2	30	5,0000	1,38962	,25371

Source: author's survey data

Following, T-test for two independent samples was carried out showing whether there are statistically significant differences between the board composition and the board size in Serbia and in Montenegro. The results of the T-test are shown in the Table 2.

Table 2. *T test results*

Board characteristics	F	Sig.	t	Sig. (2-tailed)	Mean Difference	Std. Error Difference
Non-executive	0,037	,849	-4,750	,000	-1,86667	,39295
Size	5,860	,019	-1,389	,171	-,63333	,45608

Source: author's survey data

According to the results obtained, we can conclude that there is a statistically significant difference in the board composition, because $p < 0,01$. In fact, the mean values for the board composition significantly differ ($M=2.76$ and $M=4.63$). The results show that the boards in Serbia and Montenegro differ regarding their

composition. Accordingly, it can be concluded that the hypothesis H_1 has not been confirmed. The results are incompatible with the theoretical assumptions, which makes them important for determining the cause of the observed deviation.

The results demonstrate that there is no statistically significant difference in the board size. In fact, the mean values indicate how the boards differ in regard to the observed characteristics. Based on these values, it can be seen that the boards do not differ significantly when it comes to their size ($M=4.36$ and $M=5.00$). It means that the hypothesis H_2 is confirmed, which is in line with the theoretical assumption that the size as the board structural dimension should be similar to the size of those companies that operate in the same or similar national culture.

5. Conclusion

The study of the national culture, especially research addressing the link between the national culture and corporate governance, has increased along with the globalization. This trend emerged as a response to the need to examine the correlation between corporate governance models and the institutional framework. In accordance with the fact that corporate governance models vary depending on the corporate control mechanisms, one of the relevant issues is the connection between national culture and the corporate control mechanisms. A central theme in economic research is to examine the influence of national culture on the board structure, as an important internal mechanism of corporate control. However, the empirical results in this research area are still modest, which is why the conducted research has a significant implications for institutional reform in transition economies.

In this pilot research addressing the national culture as a determinant of the board structure, we started from the following key dimensions of the national culture in Serbia and Montenegro: a high degree of uncertainty avoidance, a high power distance, collectivism and the dominance of masculinity. In accordance with the similarity of national culture in Serbia and Montenegro, it is assumed that the research results should confirm the similar board structure. However, the results obtained from the comparative analysis based on the T-test show that there is no statistically significant difference in the board size, but that the board composition differs. The observed difference identified using the T-test shows that, compared to board composition in Serbia, boards in Montenegro have a larger number of external members than internal ones. Given that there are no similar studies carried out in this area, it is of great importance that the analysis be deepened in order to examine the causes of the above deviation. The findings are significant because they indicate that the mechanisms of corporate control should be analyzed depending on the institutional framework.

In fact, these results open a new research question why there are deviations from the presumed interdependence of national culture and board structure. The above points to the need for further research on a larger sample that will include more countries with a similar national culture dimensions in order to make general conclusions. In fact, future research should deal with the study of the impact of Hofstede's cultural dimensions on the board structure. This analysis could help to detect the cause of the observed deviation. In this way, it would be possible to draw conclusions about the specific impact of each of the Hofstede's cultural dimensions. Although the four dimensions are used in research on the impact of national culture, it is also important to include the two dimensions added and to examine whether there are differences in these dimensions.

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VEZA IZMEĐU STRUKTURE UPRAVNOG ODBORA I NACIONALNE KULTURE: KOMPARATIVNA ANALIZA

Kao posledica razdvajanja vlasništva od kontrole i uspostavljanja odnosa između vlasnika kao principala i menadžera kao agenata, dolazi do pojave tzv. agencijskog problema. Za ublažavanje agencijskog problema u tranzicionim ekonomijama primenjuju se interni mehanizmi korporativnog upravljanja. Kultura se smatra jednim od značajnih faktora u okviru neformalnog institucionalnog okvira koji se često dovodi u vezu sa efektivnošću mehanizama korporativnog upravljanja. Polazeći od stava da je upravni odbor važan interni mehanizam, u radu se istražuje nacionalna kultura kao determinanta strukture upravnog odbora. Istraživanje je zasnovano na široko prihvaćenom kulturalnom okviru koji je razvio Gert Hofstede. Cilj istraživanja je da se dođe do relevantnih naučnih saznanja o tome da li se struktura upravnih odbora, posmatrana kroz kompoziciju i veličinu, razlikuje u zemljama koje odlikuju slične dimenzije nacionalne kulture. Istraživanje je sprovedeno na uzorku od 60 preduzeća u Srbiji i Crnoj Gori. Koristeći T test, rezultati istraživanja su pokazali da se kompozicija upravnih odbora u analiziranim zemljama razlikuje, dok je prosečna veličina ista. Rezultati sprovedenog pilot istraživanja ublažavaju istraživački gep koji postoji u domaćoj literaturi i predstavljaju osnovu za buduća istraživanja u ovoj oblasti.

Ključne reči: korporativno upravljanje, mehanizmi korporativnog upravljanja, nacionalna kultura, struktura upravnog odbora

POLITIČKO KOMUNICIRANJE I CIVILNO DRUŠTVO – DOBA CYBER DRUŠTVA I POSTPOLITIKE

Cilj ovog rada jeste da ukaže na međusobni odnos političkog komuniciranja i civilnog društva u vreme razvoja novih tehnologija i globalnih promena koje su uticale na krizu građanskog društva i pojavu postcivilnog društva i postpolitike. Sa razvojem novih tehnologija, političko komuniciranje u zavisnosti od stepena razvoja društva, počelo je da zauzima virtuelni prostor društvenih medija. Zaključuje se da u uslovima kada su organizacije civilnog društva oslabljene, teško funkcionišu, kada gube bitku sa vlašću, problemi u društvu se umnožavaju, politička komunikacija posustaje, a građansko društvo se transformiše u cyber društvo u kome vlada komunikaciona bliskost, zajedništvo i solidarnost. Iako postoje mišljenja da se bliži kraj civilnog društva, afirmacija on line zajednica u cyber prostoru, njihova postignuća u oblasti političke komunikacije i participacije teže da u potpunosti zamene aktivnosti civilnog društva.

Ključne reči: civilno društvo, postpolitika, politička komunikacija, mediji, javnost.

1. Uvod

Zauzimajući sferu van politike, civilno društvo u kontekstu razvoja političkog komuniciranja podrazumeva aktivnosti građana u smislu stalnog nadgledanja rada političara na vlasti, jer političke partije kao uslov postojanja demokratije nisu dokaz da ona u društvu i funkcioniše. Zato je potrebno razviti sve segmente civilnog društva kao što su institucije u oblasti kulture, nauke, obrazovanja, razna udruženja građana, sindikati, univerziteti, javnost. Na primer, odnos sindikata i politike uvek je bio područje stalnih konflikata, neslaganja i ideoloških trvenja. Dok se politika trudi da marginalizuje ulogu sindikata sa obrazloženjem da ona remeti stabilnost društva, sindikati ukazuju na svoje pravo angažovanja u političkom životu, naročito u uslovima tranzicije, odnosno velikih društvenih promena kada je potrebno izboriti se za nova pravila koja će pomiriti i zadovoljiti suprotstavljene interese socijalnih partnera. Zbog toga su komuniciranje i javnost u radu svih segmenata civilnog društva osnovni preduslovi za zaštitu i

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zastupanje interesa građana. U suprotnom, tajnost i odlučivanje male grupe ljudi stvara atmosferu nepoverenja, a komunikacija dobija formu glasina, rumornog komuniciranja¹ koje se odvija u privatnom socijalnom prostoru na nivou interpersonalnog komuniciranja, kao mehanizma za prenos poruka. Društveni mediji, mogućnosti interakcije i multimedije u okviru novog komunikacionog *on line* prostor/vremena olakšavaju protok informacija i nepresušni su izvori podataka, pružajući mogućnost internet korisnicima da učestvuju u političkom komuniciranju. Prisutnost organizacija, preduzeća, udruženja na Internetu, kao i formiranje *web* zajednica znači praćenje svetskih trendova u oblasti komunikacije i marketinga. Na nivou globalnog komuniciranja uspostavljaju se veze između sindikalnih pokreta na nacionalnom nivou sa srodnim međunarodnim organizacijama i na taj način omogućava se pravilno razumevanje i globalno sagledavanje problema dominantnog neoliberalizma u svetu.

Funkcionišući pod uticajem raznih segmenata javnosti (mediji, lokalna zajednica, vlada, poslodavci, zaposleni, razna udruženja), svi činioci građanskog društva podložni su stalnim promenama, naročito u uslovima krize, kada država iznalazi i postavlja nova rešenja u vidu reformi sistema socijalne sigurnosti čiju cenu plaćaju građani u vidu masovne nezaposlenosti, siromaštva, socijalne nesigurnosti, produbljivanja socijalnih razlika. Dolazi do preusmeravanja uloge države i povećanja odgovornosti pojedinca za sopstveni socijalni položaj, zatim teškoća u prihvatanju novih rešenja i zahteva za državnim intervencijom. Izgradnja autonomnog civilnog društva zavisi od ekonomskog razvoja, postojanja pravne regulative i razvijene političke sfere. U takvim uslovima pred aktuelnom politikom i civilnim sektorom nalaze se pitanja kao što su privatizacija, kolektivni ugovori, uspostavljanje socijalnog dijaloga, stanje u medijima, položaj zaposlenih, zaštita sloboda i prava, povećanje zarada i kvaliteta života građana.

2. Osnovne teorijske pretpostavke pojma civilnog društva

Povezanost države, civilnog društva i tržišta može se posmatrati kao odnos u kome nema potpune podvojenosti, u kome civilno društvo bez koga nema stabilnosti ne može da bude samoodržavano, već ga moraju zajedno razvijati ostala dva činioca modernog društva. Društveni interes zahteva postojanje razvijenih kulturnih, naučnih i biznis elita, jer to predstavlja uslov za formiranje sposobnog političkog establišmenta, što znači i uspostavljanje ravnopravnog dijaloga u političkoj komunikaciji. Tamo gde je društvo nerazvijeno, civilno društvo može zatražiti pomoć i od međunarodnih fondacija. Međutim, ako akteri građanskog društva nemaju viziju demokratskog razvoja i nisu sposobni da budu kritički balans državi, biće samo deo marginalizovanog civilnog društva. Dok Haber-

¹ Radojković Mirosljub, Miletić Mirko, (2008): *Komuniciranje, mediji i društvo*, Učiteljski fakultet, Beograd, 67.

mas (Jürgen Habermas)² smatra da je kao zajednički imenitelj za razumevanje tržišta potreban novac, u sferi države moć, a u civilnom društvu solidarnost, u smislu delovanja ljudi, udruživanja u polju građanskog društva u okviru ideje o civilnom društvu kao o samoodržavanom činiocu, prema Hobsu (Thomas Hobbes)³, građansko društvo je prostor u kome se ugovaraju različiti interesi, odnosno u kome građansko društvo ima posredničku ulogu između društvene, političke i ekonomske dimenzije. Društvena dimenzija definiše civilno društvo kao prostor u kome članovi ispoljavaju specifičnu slobodu ponašanja. Civilno društvo sa stanovišta političke dimenzije predstavlja prostor u kome se intimna sfera prepliće sa politizovanim domenom države “koji navodi čoveka da uđe u arenu javne političke debate u kojoj neograničeni kapacitet privatnog domena stupa u interakciju sa političko-pravnim aparatom (državom) čija je funkcija da ograniči kapacitet kako bi održao red u civilnom društvu”⁴; u tom smislu, Habermas civilno društvo u obliku javne sfere naziva ‘racionalno-kritična funkcija javnosti’⁵. Treća, ekonomska dimenzija, civilno društvo poistovećuje sa slobodnim tržištem u kome vladaju principi konkurencije i pregovaranja o zajedničkim interesima konkurenata.

Za razliku od građanskog društva koje postoji i koga čine građani države, zajednice, prostora, ali koje nema formu vlastitosti, nije slobodno i podsticajno, civilno društvo nije ‘po sebi dato’ već se mora izboriti da građanima pruži sigurnost, izvesnost, slobodu, prostor za kreaciju i napredovanje.⁶ Istorijski posmatrano, pojam civilnog društva izveden iz sinteze *societas civilis* latinskog prevoda grčkog pojma *koinonia politike*, kretao se od poistovećivanja sa državom, do potpune distinkcije pojmova. U okviru različitih relevantnih političkih teorija nailazi se na transformaciju koncepta civilnog društva i države kao političkog aparata. Poistovećujući građansko i političko društvo, odnosno državu, Aristotel je ta dva pojma definisao kao *polis*. Dok je Bruni (Leonardo Bruni)⁷ početkom XV veka starogrčki pojam *polis* označio kao *civitas* i prvi upotrebio taj termin prevodeći Aristotelovo delo ‘Nikomahova etika’, Ridel (Manfred Riedel) je pojam civilnog društva po antičkom shvatanju razlikovao od modernog shvatanja građanskog društva i političke države po kome su to dva razdvojena pojma. ‘Prvi obrisi dihotomije između ‘građanskog’ u smislu *civilis* i ‘političkog’ u smislu *poli-*

² Habermas Jürgen (1969): *Javno mnjenje*, Biblioteka misao i dileme, Beograd.

³ Hobbes Thomas prema Breslow Harris (2001): “Civilno društvo, politička ekonomija i Internet”, u: *Virtuelna kultura – Identitet i komunikacija u kiber društvu*, Stiven Džouns (prir), Biblioteka XX vek, Beograd, 332.

⁴ Breslow Harris (2001), 333.

⁵ Habermas Jürgen (1969), 35.

⁶ Šijaković Ivan (2008): *Sociologija - uvod u razumevanje globalnog društva*, Univerzitet u Banja Luci, Ekonomski fakultet, Banja Luka, 56.

⁷ Pavlović Vukašin (2006): *Civilno društvo i demokratija*, drugo izmenjeno izdanje, Službeni glasnik, Beograd, 12.

ticus” javljaju se u prvoj deceniji XVIII veka, a šire se zahvaljujući Monteskejue (*Ch. Montesquieu*)⁸. Civilno društvo kao „specifičan skup društvenih komunikacija i socijalnih veza, socijalnih institucija i društvenih vrednosti, čija je polazna tačka i glavni akter ličnost kao građanin”⁹ počiva na principima autonomije, građanske inicijative, nepolitičnosti, kontrakulturalnosti, pluralizma, solidarnosti, individualnosti, javnosti, humanosti...

Klasični koncept civilnog društva bazira se na različitim istorijskim korenima kao preovlađujućim političkim kulturama, od evromediteranske struje koju karakterišu tzv. sinjorije, italijanski gradovi-republike u vreme renesanse u kojima se pojavljuju začeci građanskog društva (Bruni iz Firence, Makijaveli /*N. Macchiavelli*/), preko kontinentalno-evropske, specifične za novonastale nacionalne evropske države koje prednost daju državi, iako uvažavaju postojanje civilnog društva (od Monteskeja do Hegela /*G.W. Friedrich Hegel*/), do anglo-američke tradicije koja favorizuje individualna prava, a građansko društvo posmatra kao autonomno u odnosu na državu (od Loka /*John Locke*/, do Pejna /*Tomas Paine*/ i Tokvila /*Alexis de Tocqueville*/). Devetnaesti vek označio je razvoj ideja odvajanja države od civilnog društva, pa pritom treba razlikovati dva ključna istorijsko-kulturna uticaja, kao što su germansko mišljenje o civilnom društvu koje daje prednost u rešavanju društvenih pitanja državi i zastupa kolektivističku orijentaciju i liberalna anglo-američka politička kultura koja se zalaže za društveno rešavanje važnih pitanja u građanskom društvu ističući važnost individualističke vrednosne orijentacije. Iako koristeći termin civilno društvo misli na političko, Lok¹⁰ društvo sagledava van političke stvarnosti¹¹, a Monteskje postavlja osnov za sagledavanje razlike između države i civilnog društva smatrajući da se ono nalazi između vlasti i prava koja su garantovana zakonima. Razmišljanja ova dva teoretičara koja ukazuju na to da civilno društvo predstavlja zasebnu, ali ne i samostalnu sferu u odnosu na državu, ukazuju na činjenicu da društvo ne treba poistovećivati sa državom kao političkom organizacijom. Opisujući relaciju države i civilnog društva Kin (*John Keane*) polazi od modela države sigurnosti (*The Security State*) i civilnog društva koje je izjednačeno sa državom u kojoj, po Hobsu¹² vlada rat svih protiv svih; zatim opisuje konstitucionalnu državu (*The Constitutional State*) karakterističnu po shvatanju demokratski orijentisanog Loka¹³ koji se zalaže za očuvanje privatne svojine kao temelja građanskog društva, ali nije sasvim jasan u pogledu razgraničenja države i civilnog društva; o modelu minimalne države (*The Minimum State*) govori

⁸ Riedel Manfred prema Pavlović Vukašin (2006), 13.

⁹ Isto, 57.

¹⁰ Locke John (1978): *Dve rasprave o vladi*, knjiga II, Mladost, Beograd, 2.

¹¹ Isto, 53.

¹² Hobbes Thomas (1962): *Leviathan*, Macmillan, New York.

¹³ Locke John (1978): *Dve rasprave o vladi*, knjiga II, Mladost, Beograd.

Pejn¹⁴, a o univerzalnoj državi (*The Universal State*) promišlja Hegel¹⁵ smatrajući da država mora da sačuva nezavisnost civilnog društva koje „istovremeno zahteva i obezbeđuje preduslove za institucionalno odvajanje suverene i apsolutne države”¹⁶; model liberalno-demokratske države (*The Liberal-Democratic State*) zastupali su Stjuat Mil (*John Stuart Mill*)¹⁷ koji je isticao građansku individualnu slobodu i Tokvil¹⁸ koji je upozoravao na mogućnosti tiranije većine nad manjinom¹⁹. U okviru germanske kulturne tradicije, kao teorijski utemeljivač dihotomne paradigme o odnosu države i civilnog društva, Hegel je pokušao da ujedini liberalizam i viziju svemoćne univerzalne države, smatrajući da je jedino država u stanju da zastupa opšte interese. Marks je nedovoljno jasno kritikovao njegovu koncepciju tvrdeći da treba ukinuti razliku između civilnog društva i države, tako što će se insistirati na područjavanju države i politike. Takođe se zalagao za izjednačavanje pojmova buržoaskog i građanskog društva i isticao njegovu klasnu osnovu.

U okviru savremenog koncepta civilnog društva u prošlom veku pojavljuju se potpuno novi koncepti. Gramšijevo (*Antonio Gramsci*) shvatanje o autonomiji civilnog društva podrazumeva dva principa buržoaskog klasnog društva: princip hegemonije koji predstavlja „pristanak nad onima nad kojima se vlada” i ostvaruje se putem kulturnih sadržaja u okviru civilnog društva i princip dominacije koji se stiče uz podršku prisile, a ostvaruje se putem prava, policijskog i vojnog aparata države. Ističući da je civilno društvo uslov za izvođenje društvenih i političkih promena, Gramši je smatrao da se civilno društvo sastoji iz „kulturno-vrednosnih sadržaja, normi i značenja, s jedne, kao i mreže institucija i građanskih asocijacija, s druge strane”²⁰. Sledeći koncept građanskog društva promovišu teoretičari evropskih društvenih pokreta (Turen /*Alen Touraine*/, Ofe /*Claus Offe*/, Kin) koji civilno društvo posmatraju kao neformalnu mrežu društvenih pokreta i građanskih inicijativa. Habermasovo istraživanje nastanka javnog mnjenja u okviru studije „Strukturna transformacija javne sfere”²¹ predstavlja doprinos konceptu proučavanja javne sfere i javnosti građanskog društva.

Pojmovi „javnost” i „javno mnjenje” jesu istorijske kategorije građansko-liberalnog porekla i razlikuju se od antičkog doba koje javnost definiše kao javni život u polis, feudalnog shvatanja po kome „reprezentativna javnost znači status, atribut ličnosti, na primer grb i oružje, manire i utvrđenu retoriku i javnosti građanskog društva koje predstavlja sferu privatnih ljudi koji okupljeni čine

¹⁴ U svojoj knjizi *Prava čoveka* iz 1791. godine.

¹⁵ U knjizi *Osnovne crte filozofije prava* iz 1821. godine.

¹⁶ Hegel G.W. Friedrich prema Pavlović Vukašin (2006), 23.

¹⁷ U delu *O slobodi* iz 1859. godine.

¹⁸ U knjizi *O demokratiji u Americi* iz 1835.

¹⁹ Habermas Jürgen (1969), 174.

²⁰ Gramši Antonio prema Pavlović Vukašin (2006), 36.

²¹ Kod nas je prevedena 1969. godine pod nazivom *Javno mnjenje*.

publiku”.²² Prema Habermasu, građanska javnost, nastala u XVIII veku, podeljena je na dve sfere: na privatnu u smislu građanskog društva kome odgovara politička javnost, porodična sfera i građanska inteligencija sa literarnom javnošću i sfera javne vlasti koja se nalazi naspram građanskog društva i političke javnosti.²³ Pojam „javnosti” podrazumeva dva značenja; jedno je javna vlast i odnosi se na državu, a drugo je javno mnjenje čije je značenje upućeno društvu. Građanska javnost kojoj je potrebna javnost regulisana propisima vlasti, teži da u okviru političkog obračuna, odnosno u okviru javnog rezonovanja usmerenog protiv vlasti, uspostavi opšta pravila u komunikaciji koja se odnose na javnu sferu robnog prometa ili društvenog rada.²⁴ Dakle, moderno shvatanje pojma civilnog društva koje je zamišljeno kao protivteža državi podrazumeva delovanje građana, autonomiju u javnoj sferi u odnosu na državu u okviru koje se postavljaju zakoni i u kojoj građani mogu da izražavaju svoje interese, ideje i prioritete.

3. Političko komuniciranje i razvoj novih tehnologija – kriza civilnog društva i politike

Koncentracija kapitala, širenje tržišta, podela vlasničkih i upravljačkih funkcija, prelazak proizvodnje iz privatne u javnu sferu i pojava masovnih medija ukazuju na procese koji su uticali na srastanje privatne i javne sfere, što dovodi do povlačenja građanske javnosti pred vlašću koja posredstvom medija nameće publici teme i načine razmišljanja. Tako kritička javnost, smatra Habermas, umesto rezonovanja dobija funkciju aklamacije, a javno mnjenje zamenjuje proizvedenim, manipulativnim mnijenjem²⁵. Nema više publike privatnih građana; pojavljuju se grupe, udruženja, organizacije, partije povezane zajedničkim interesima. “Komunikacioni kompleks publike privatnih ljudi koji rezonuju sada je razbijen”²⁶, a zahvaljujući medijima, grupe koje učestvuju u vršenju vlasti trude se da u okviru političke komunikacije postignu saglasnost posredovane publike. Poštujući Habermasovo mišljenje o tome da je publicitet masmedijski proizveden, može se reći da ne treba zanemariti ni postojanje individualnog mišljenja o različitim političkim pitanjima i težnji da se ti stavovi iskažu u komunikaciji. Za prerastanje ovih razmišljanja u preovlađujuća mišljenja u okviru javnog mnjenja, važna je mogućnost njihovog ostvarivanja u kontekstu demokratskih društvenih odnosa. Odsustvo političke demokratije kao norme javnog života i političkih sloboda vezuje se za nepostojanje javnog mnjenja u smislu dva modaliteta: kri-

²² Habermas Jürgen (1969), 38.

²³ Tadić Ljubomir (1998): *Ogled o javnosti*, Fakultet političkih nauka, Čigoja štampa, Beograd, 47.

²⁴ Habermas Jürgen (1969), 38.

²⁵ *Isto*, 275.

²⁶ *Isto*, 311.

tičkih normi i manipulativnog publiciteta (činjenica), a zatim i suspendovanje slobodnog protoka informacija koje su glavni izvor demokratske javnosti, kao i pojava cenzure. Sloboda izražavanja kao i sva ostala društvena prava i slobode moraju imati realne mogućnosti potvrđivanja u masmedijskom kompleksu kao javnom prostoru društvenog dijaloga. Mediji koji predstavlja jednu od ustanova civilnog društva treba da budu tribine na kojima se sučeljavaju različita mišljenja i interesi građana upućeni državi; prostori u okviru kojih birači pozivaju na odgovornost vlast za koju su glasali, dajući im mandat da ostvare na izborima odobrene političke aktivnosti.

Sa razvojem novih tehnologija, političko komuniciranje u zavisnosti od stepena razvoja društva, počelo je da zauzima virtuelni prostor društvenih medija. *On line* politička komunikacija za razliku od komunikacije u industrijskom društvu, odnosa sukoba i nerazumevanja, pružila je mogućnost građanima da povrate poverenje u modernu demokratiju i politiku, jer komunikacija u postmodernom svetu društvenih medija podrazumeva prostor interaktivnog komuniciranja, mesto na kome se neposredno usmerava volja građana, omogućava transparentnost, podstiče diskusiju i unapređuje demokratičnost. Novom sagledavanju realnosti i okviru postmodernog društva doprinela je popularnost *web* sajtova, blogova, društvenih mreža kao nezaobilaznih sredstava političke komunikacije u novom prostor/vremenu u kome se na nov način tretiraju procesi političke participacije. U postcivilnom društvu, Internet pospešuje osećaj društvenosti i komunikacijske bliskosti zahvaljujući interaktivnosti i multimedijalnosti. To čini osnovnu razliku između komunikacije putem tradicionalnih masovnih medija koju je karakterisao odnos između političkih komunikatora i civilnog društva u kome nije bilo *feedback-a*, u kome su se umesto dijaloga izdavala saopštenja i dobijali odloženi odgovori. U situaciji kada počinje da gubi bitku sa vlašću dolazi do povlačenja civilnog društva, javljaju se pokreti i organizacije koje svoje pozicije stižu netolerantnim i diskriminativnim ponašanjem, iako se javno zalažu za slobodu i prava svih građana, koristeći slobodan prostor koji je pripadao sferi civilnog društva. Zbog toga se javljaju mišljenja da se bliži kraj civilnog društva.²⁷ Transformacija civilnog u postcivilno društvo izazvana je globalnim promenama u poslovanju, u jačanju industrijskih korporacija, u oblasti političke ekonomije, internet komunikacije i ljudskih resursa²⁸. Afirmacija *on line* zajednica u *cyber* prostoru, njihova postignuća u oblasti komunikacije i participacije zamenila je aktivnosti civilnog društva. U postcivilnom, odnosno *cyber* društvu, vlada komunikaciona bliskost, zajedništvo i solidarnost među umreženim pojedincima koji se umesto na trgovima, ulicama sastaju u virtuelnom prostoru na Internetu. Iako zagovara osećaj društvenosti "ostaje da se vidi da li će se ova društvenost pretvoriti u solidarnost".²⁹

²⁷ Breslow Harris (2001), 360.

²⁸ *Isto*, 354.

²⁹ *Isto*, 359.

Pojavom novih medija u okviru globalnih procesa promenili su se tradicionalni oblici političke komunikacije, tako što su građani postali subjekti međunarodnog/globalnog komuniciranja dobivši mogućnost da se uključe u interakcijske procese i javne diskusije, da iniciraju važne teme i prikupljaju saglasnost globalne javnosti za rešavanje problema u duhu saradnje, dogovora, zajedničkih interesa. Često se u okviru zajednica na Internetu građani organizuju tako što se stvara mogućnost preliivanja javnog nezadovoljstva iz virtuelnog u realni prostor i dolazi do konkretnih političkih i ekonomskih posledica (npr. 'arapsko proleće'³⁰). U takvim uslovima, političke stranke u okviru tzv. nove postpolitičke, okreću se aktivnostima na Mreži da bi svojim prisustvom pokazali razumevanje za potrebe civilnog društva, odnosno virtuelne javnosti i da bi ukazali svoju spremnost da se uključe u moderne tokove političkog komuniciranja u *on line* prostoru. Brzina, mobilnost, dostupnost sveta informacija u postcivilnom društvu uticala je na promene u sferi političke komunikacije u smislu izmene sadržaja i forme izražavanja. Utičući na nove načine pristupa politike građanima bez obzira na to za koju se političku opciju zalažu, nove tehnologije su omogućile pojavu 'nove politike' koja koristi virtuelni prostor da bi se distancirala od negativnih konotacija koje je povezuju sa manipulacijom i propagandom. Digitalni mediji ustupaju svoj komunikacioni prostor za dijalog van medijskih sadržaja koje plasiraju političke spin centrale, pa internet korisnici mogu da prenose svoje informacije, proveravaju medijske poruke i razne glasine, ali i da ih komentarišu, kritikuju u okviru svojih zajednica na Mreži.

Proces centralizacije u političkim partijama, uloga 'spin doktora', nezadovoljstvo javnosti politikom pozicije, dovodi do osporavanja njihove legitimnosti u okviru alternativnih oblika komunikacije. Napetost između 'nove civilne javnosti' i politike kod građana izaziva apatiju, nepoverenje, otuđenje, jer se čini da politička komunikacija nema nikakve svrhe i da izlazak na izbore ne rešava problem. Zato javnost sve češće apstinira ne želeći da učestvuje u izbornom procesu u koji ne veruje, jer smatra da politička komunikacija nije u stanju da se izbori za istinu sa manipulacijom i propagandom. Ono što ovu situaciju čini ozbiljnom jeste činjenica da se zbog ovakvog nezadovoljstva javlja destabilizacija društva u kome se politika trudi da spinuje medijske sadržaje. Pokušavajući da rad političkih struktura učine javnim, dostupnim kontroli i ograničavanju, građani putem pokretanja svojih inicijativa i organizovanja protesta teže da civilno društvo dobije kritičku, kontrolnu, edukativnu, solidarnu, integrativnu, stabilizirajuću, pokretačku i civilizirajuću ulogu.

³⁰ Iran – protesti opozicije tokom predsedničkih izbora 2009. godine nazvani 'Twitter revolucija'; delovi Severne Afrike – protesti krajem 2010; 'Jasmin revolucija', u Tunisu i kasnije u Egiptu početkom 2011. U Evropi: Belgija, Grčka, Španija, Velika Britanija, Nemačka.

4. Zaključak

Komunikacija kao jedan od važnih principa civilnog društva podrazumeva interakciju između javnosti, medija i političkih aktera bez koje nema pravilnog funkcionisanja civilnog društva. Ako se pođe od definicije demokratije kao vladavine naroda u kojoj javnost treba da donosi sudove i kontroliše rad političara na vlasti, onda je sasvim jasno da mišljenja publike zavise od raspoloživih informacija plasiranih putem medija. Propaganda kao planski organizovano širenje političkih, ekonomskih, religijskih ideja radi uticaja na javno mnjenje, manipulacija kao organizovana neprimetna laž koja se infiltrira u tuđa mišljenja³¹, ili spinovanje informacija, utiču na promene nastale u okviru političke komunikacije koja promoviše medijatizovanu estetizovanu političku aktivnost u okviru nove političke kulture. Političko komuniciranje posmatrano kao sastavni deo političkog procesa, njegovog razvoja, funkcija, karakteristika, strategija i sredstava, može biti sagledano kroz odnos sa strukturom društvene i političke moći, sa političkom propagandom kao presuazivnom funkcijom političkog komuniciranja, kao i kroz sagledavanje značaja političkog komuniciranja za razvoj civilnog društva. Sadržaj političkog komuniciranja odnosi se na poruke koje direktno ili indirektno ukazuju na konstituisanje i vršenje vlasti.³² S tim u vezi, kao funkcija političkog komuniciranja pojavljuje se politička persuazija koja direktno utiče na političku propagandu, politički marketing, odnose s javnošću i političko oglašavanje. Sledeće dve funkcije komuniciranja jesu političko informisanje koje se odnosi na razmenu informacija između političkih subjekata i politička edukacija i socijalizacija u smislu obrazovanja građana radi uključivanja u političku komunikaciju i participaciju.

Koliko su za civilno društvo značajne komunikacijske i medijske strukture ukazuje i Habermasovo mišljenje koje komunikacioni proces označava kao 'kamen temeljac' civilnog društva. Ako se u okviru civilnog društva ne može uspostaviti otvorena društveno konstruktivna komunikacija onda dolazi do 'disfunkcionalnog političkog poretka' koji vodi ka nemogućnosti artikulisanja zajedničkih vrednosti i interesa.³³ U svetu masovnih medija u okviru jednosmerne komunikacije, nezavisna javnost ne može postojati van masmedijskog prostora, koji zahvaljujući svojoj tehničko-tehnološkoj strukturi nije uvek u mogućnosti da utiče na formiranje ovog fenomena civilnog društva, osim ako se ne postigne sprega individualnih i zajedničkih, komercijalnih interesa koji će različitim političkim, ekonomskim i kulturnim opcijama dozvoliti pristup medijima. Sa razvojem novih tehnologija i postcivilnog društva, sa pojavom

³¹ Jevtović Zoran (2003): *Javno mnjenje i politika*, Akademija lepih umetnosti i Centar za savremenu žurnalistiku, Beograd, 25.

³² Slavujević Zoran (2009): *Političko komuniciranje, politička propaganda i politički marketing*, Grafocard, Beograd.

³³ Breslow Harris (2001): 336.

društvenih medija i mogućnosti dvosmerne političke komunikacije, došlo je do ubrzanja prenosa velikog broja informacija i formiranja novog mesta za okupljanje civilne javnosti. Web sajtovi i blogovi postali su vremenom sve korišćenija sredstva političke komunikacije u svakodnevnom političkim aktivnostima. Informatika je na mreži razvila predznak društvenosti i postala nova disciplina - politička informatika, koja se definiše kao proces upravljanja zasnovanih na protoku informacija u digitalnim svetu.³⁴ Komunikacioni centri više nisu isključivi 'gospodari' informacija, jer tu ulogu počinju da dele sa internet aktivistima u okviru participativnog, javnog novinarstva. Komuniciranje i javnost u radu svih segmenata civilnog društva osnovni su preduslovi za zaštitu i zastupanje interesa građana, jer tajnost i odlučivanje male grupe ljudi stvara atmosferu nepoverenja, a komunikacija dobija formu. Društveni mediji u okviru novog komunikacionog on line prostor/vremena olakšavaju protok informacija i nepresušni su izvori podataka, pružajući mogućnost internet korisnicima da učestvuju u političkom komuniciranju.

Cilj ovog rada jeste da ukaže na međusobni odnos političkog komuniciranja i civilnog društva u vreme razvoja novih tehnologija i globalnih promena koje su uticale na krizu građanskog društva i pojavu postcivilnog društva i postpolitike. Sa razvojem novih tehnologija, političko komuniciranje u zavisnosti od stepena razvoja društva počelo je da zauzima virtuelni prostor društvenih medija. Nastojeći da zaštiti građane pružajući im slobodu, samostalnost, pluralizam, afirmišući njihovu kreativnost, civilno društvo u moderno doba pokazuje određene slabosti i svoju nemoć da se izbori sa krizom i kontrolom države. Zaključuje se da u uslovima kada su organizacije civilnog društva oslabljene, teško funkcionišu, kada gube bitku sa vlašću, problemi u društvu se umnožavaju, politička komunikacija posustaje, a građansko društvo se transformiše u *cyber* društvo u kome vlada komunikaciona bliskost, zajedništvo i solidarnost. Iako postoje mišljenja da se bliži kraj civilnog društva, afirmacija *on line* zajednica u *cyber* prostoru, njihova postignuća u oblasti političke komunikacije i participacije teže da u potpunosti zamene aktivnosti civilnog društva.

³⁴ Štambuk Vladimir (2008): "Politička informatika", *Godišnjak Fakulteta političkih nauka* 2 (2), 289-305, Beograd, 295.

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POLITICAL COMMUNICATION AND CIVIL SOCIETY - AGE OF CYBER SOCIETY AND POSTPOLITICS

Communication and the public, in the operation of all segments of civil society, are the essential prerequisites for the interests of citizens to be protected and represented, because on one hand, the secrecy in decision-making of a small group of people creates an atmosphere of mistrust, and on the other, communication gets the form of rumour and takes place in a private social space at the level of interpersonal communication. Social media, as a part of a new communication online space/time, not only facilitates the flow of information but, at the same time, they are inexhaustible sources of data which provide the opportunity for internet users to participate in political communication. The aim of this paper is both to point out the mutual relationship between political communication and civil society at the time of the development of new technologies, and also the global changes that have affected the crisis of civil society and the emergence of post-civil society and post-politics. With the development of new technologies, political communication, depending on the level that society has achieved in its development, began to occupy the virtual space of social media. It is concluded that in conditions when civil society organizations are weakened and therefore are hardly operating, when the struggle with the authorities is being lost, then the problems in the society are being multiplied, political communication is lagging behind, and consequently the civil society is being transformed into a cyber-society in which communication closeness, communion and solidarity are dominant. In spite of the certain opinions that the end of the civil society is approaching, the affirmation of the online communities in the cyberspace, their achievements both in the field of political communication and participation, tend to entirely replace the activities of civil society.

Keywords: civil society, post-politics, political communication, media, public.

XI JINPING'S AUTHORITARIANISM, CHINESE FOREIGN POLICY AND INDIA

China's President Xi Jinping has placed great emphasis on power consolidation, focusing on domestic restructuring to enhance the centrality of the Chinese Communist Party (CCP) and its communist ideology. This has compelled political pundits to mull over the bearing of a strong authoritarian Chinese regime on Xi Jinping's foreign policy. China is already casting strong regional maritime advances and leveraging its economic might over its continental periphery. In this regard, tensions are rising in the Indo-Pacific region with countries like India and Japan coalescing to negate China's assertiveness. Nonetheless, the new security architecture of Asia demands balanced strategic manoeuvring, exemplified by China and India pushing their bilateral ties forward while striking new deals with other like-minded countries.

Keywords: Xi Jinping, authoritarianism, Chinese foreign policy, Xi's presidency, Indian foreign policy, India-China relations

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1. Introduction

At the 19th National Congress of the Communist Party of China (CPC) convened in October 2017, the CPC's Constitution conferred on Xi Jinping an astounding measure of ideological authority by revising the constitution and imbibing "Xi Jinping Thought on Socialism with Chinese Characteristics for a New Era" as the CPC's new guidebook.¹ In October 2016, he was given the special stature of being a "Core Leader" of China, already setting him apart from his predecessors.² It was Deng Xiaoping who had coined the term "core" leader for himself, Mao Zedong and Jiang Zemin, meaning that their authority was almost absolute and unquestionable. So, now in 2018, with the revision of the President's and the Vice President's term limits while bestowing complete control of all the key pillars of the Chinese nation — the government, party and the army — to the President, there can be no better time than now for Xi Jinping, allegedly the most powerful leader after Mao in Chinese political history, to occupy office for as many terms as he cherishes after his coming term officially concludes in 2023. This will be a pivotal moment in China's history — Xi will become the longest serving leader after Mao.³ Moreover, with no strong opposition from the elite, one can only expect him to reinforce his authority to the optimum.

Ever since he came to rule in 2012, there has been rapid consolidation of Xi's power, starting from 2013, when he began heading the Special Leading Group taking care of economic reforms⁴, to appointing himself the commander-in-chief of the Chinese military, even though as the Central Military Commission head, he was already in charge of the armed forces.⁵

¹ Full text of Xi Jinping's report at the 19th CPC National Congress: "Secure a Decisive Victory in Building a Moderately Prosperous Society in All Respects and Strive for the Great Success of Socialism with Chinese Characteristics for a New Era", 10/2017; "Incorporation of Xi Jinping Thought into Constitution Conducive to National Rejuvenation", *People's Daily*, 2/2018, <http://en.people.cn/n3/2018/0226/c90000-9430280.html> (27.5.2018).

² "China's Xi appointed 'core' leader, on par with Mao, Deng", *Reuters*, 10/2016, <https://www.reuters.com/article/us-china-politics/chinas-xi-anointed-core-leader-on-par-with-mao-deng-idUSKCN12RICK>, (27.5.2018).

³ Li Ruohan, Bai Yunyi: "China adopts Constitutional amendment", *Global Times*, 3/2018, <http://www.globaltimes.cn/content/1092805.shtml>, (27.5.2018); "Amendments proposed for Constitution", *China Daily*, 2/2018, <http://www.chinadaily.com.cn/a/201802/25/WS5a927386a3106e7dcc13dece.html> (27.5.2018).

⁴ "China Reform Pledges Show Xi Assuming Deng Mantle, Analysts Say", *South China Morning Post*, 11/ 2013, <https://www.rappler.com/world/regions/asia-pacific/44091-china-economy-policy-reform-xi-jinping-analysis>, (27.5.18)

⁵ "Xi Jinping named as "commander in chief" by Chinese state media", *The Guardian*, 4/2016, <https://www.theguardian.com/world/2016/apr/21/xi-jinping-named-commander-in-chief-chinese-state-media>, (27.5.2018).

Understanding various domestic changes in China is crucial. Being the number two power globally and much keen on becoming number one, China shapes its policies in an integral way for securing world peace and security. Its foreign policy relevance as well is much consequential, most significantly, the development of Xi's most important master project - the Belt and Road Initiative (BRI). For the BRI's success, China has aligned itself with numerous countries for matters of economy, defence and security. The "new era" strategy - to re-establish China in the world order and make it a powerful state to reckon with - exemplifies this. In its pursuit, Beijing has been engaging in a multipronged foreign policy, juxtaposing "bringing-in" and "going-out" policies.⁶ While "bringing-in" involves hosting grand affairs and holding meetings with foreign delegates, the "going-out" strategy involves the leadership and bureaucrats making overseas visits through outreach programmes comprising signing of multifarious agreements and deals, engaging in cooperative programmes and fostering investment abroad.

This paper will first focus on the various domestic developmental reforms taking place in China which are strengthening Xi's rule and hence, the existing authoritarian regime.⁷ Secondly, it will seek to unearth what took place in China domestically from Hu Jintao's period to Xi Jinping's, to bring forth such rapid transformations. Revisiting the past helps in uncovering the ambiguities of the present. Thirdly, there will be an attempt to comprehend the consequences of China's assertive stance on neighbouring middle powers, particularly India, and how most of their positions are hinged on China's political manoeuvres. An in-depth analysis of these issues will give a deeper understanding of how middle powers like India can position themselves more progressively to deal with a seemingly insatiable China.

2. Domestic Restructuring – Implications of authoritarianism in China

The last time the constitution was amended was in March 2004 at the Second Session of the Tenth National People's Congress; the current amendment is the fifth occasion that the constitution is being amended.⁸ It has been referred to as an "important" development in China's political functioning, played safely by Xi

⁶ Xie Tao: "Chinese Foreign Policy with Xi Jinping Characteristics", Carnegie Endowment for International Peace, 11/2017, <http://carnegieendowment.org/2017/11/20/chinese-foreign-policy-with-xi-j>. (27.5.2018).

⁷ This paper is an extension of the issue brief published by Jagannath P. Panda in IDSA. Please see, Panda Jagannath, "Xi Jinping's Extended Presidency and India-China Relations", *IDSA Issue Brief*, 3/2018, https://idsa.in/issuebrief/xi-jinping-extended-presidency-india-china-relations_jppanda_270318, (27.5.2018).

⁸ "Constitution of the People's Republic of China" The State Council PRC http://english.gov.cn/archive/laws_regulations/2014/08/23/content_281474982987458.htm, (27.5.2018).

by not contravening any laws around age but still retaining his personal allies in the Politburo.⁹ The focus of the Chinese state media is mostly directed towards the idea that the amendment has not changed the retirement age of the party officials, but represents an extremely progressive move fortifying Xi's rise as the leader of the CPC.

He has already manifested Xi Jinping's Thought on "Socialism with Chinese Characteristics for an Era"¹⁰ into the party's constitution, which basically entails China establishing a "moderately prosperous society" by 2020, becoming a great modern socialist country by 2035 and, eventually, restoring its strength by the middle of the 21st century.¹¹ The ideological tightening of the amendment has been reflected in the charter of the Chinese People's Political Consultative Conference (CPPCC) as well – an advisory structure of the party.¹² Thus, it has ramifications for all of China's political, economic, diplomatic, social and military reforms.

According to Cheng Enfu, a deputy to the 13th NPC and a professor at the Chinese Academy of Social Sciences, "China has unfinished economic, political, diplomatic and military reforms, and the country needs a determined and innovative State leader to accomplish such goals".¹³ Before delving any further, it is important to question what authoritarian regimes fundamentally mean and how they actually function.

Authoritarian regimes in their broadest sense include all patterns of undemocratic rule where the institutions of political competition, control and monitoring of power and participation do not exist. Individuals do not have fundamental rights or constitutional accountability and their freedom is always subordinate to the state.¹⁴ These are however different from totalitarian regimes, which involve rule over everything - from political to apolitical aspects

⁹ Stanzel Angela et al: "China's New Era with Xi Jinping's characteristics", *European Council on Foreign Relations*, 12/2017, http://www.ecfr.eu/publications/summary/chinas_new_era_with_xi_jinping_characteristics7243, (27.5.2018); Zhao Yusha: "Communique notes China at 'new historical starting point' for China" *Global Times*, 10/ 2017, <http://www.globaltimes.cn/content/1070429.shtml>, (27.5.2018).

¹⁰ "Compilation of Xi Jinping's remarks on youth and the work of the Communist Youth League", Beijing, Central Party Literature Press, 2017.

¹¹ An Baijie: "Xi pledges 'new era' in building moderately prosperous society", *China Daily*, 10/2017, http://www.chinadaily.com.cn/china/2017-10/19/content_33428169.htm, (27.5.2018).

¹² "Proposed Amendment to CPPCC Charter Unveiled", *Xinhua*, 3/2018, http://www.xinhuanet.com/english/2018-03/08/c_137025376.htm, (27.5.2018).

¹³ Li Ruohan, Bai Yunyi: "China Adopts Constitutional Amendment", *Global Times*, 3/2018, <http://www.globaltimes.cn/content/1092805.shtml>, (27.5.2018).

¹⁴ Ginsburg Tom, Simpsen Alberto (2014): "Introduction, Chapter 1 of Constitutions in Authoritarian Regimes", *University of Chicago Public Law & Legal Theory Working Paper* No. 468/ 9-11.

of life.¹⁵ An authoritarian regime may hold an election but citizens do not have any say in its outcome. The state apparatus is usually coercive, especially when faced with external or internal threats.¹⁶ How the threat is calculated depends on the resilience of the state's political institutions and civil-military relations. In regimes characterised by weak political institutions and conflict-prone civil-military relations, threats are perceived more gravely and military organisational practices are adopted.¹⁷ Such militaries maximise their capabilities by conducting rigorous trainings, by capitalising on improving capacity and military specialisations, ensuring that command is unified and decentralised.¹⁸ To evoke Charles Tilly's dictum, for an authoritarian regime "war made the state and the state made war".

Since regime stability is the most important for the sustenance of the leader's rule and security, external threats are considered more severely than internal ones. Occurrences like rural insurgencies or street protests are usually not perceived to be as perilous as an external threat assessment or a military coup. Moreover, as social protests may take several years to garner support, while offering opportunities for making peace through negotiations, their occurrence is not considered much dangerous for regime stability. The case of China, more or less, validates all of these arguments of what makes a country hard authoritarian. Nothing is more important for China than maintaining regime stability - it not only prohibits social protests but strictly controls the circulation of data too, except for state-sponsored media. Too much liberty or access to information is seen as a potential destabiliser of the regime.¹⁹

Xi's present rule points towards a unified, much consolidated leadership in times to come. Since he joined office, Xi has slowly but successfully consolidated his power by not only exercising power in the party and the military but also heading other Leading Groups and commissions. While previously economic and financial affairs were controlled by Premier Li Keqiang, the state of the current political structure witnesses Xi Jinping exercising leadership in almost all sectors.²⁰

¹⁵ Friedrich Carl J, Brzezinski, Zbigniew K. (1956): *Totalitarian Dictatorship and Autocracy*, New York, 367-368.

¹⁶ For a theoretical discussion of authoritarian military regimes, see Talmadge Caitlin (2016): "Different Threats, Different Militaries: Explaining organizational practices in authoritarian regimes", *Security Studies*, 25:111-141.

¹⁷ Huntington Samuel P. (1957): *The Soldier and the State: The Theory and Politics of Civil-Military Relations*, Cambridge, 80-98, MA: Harvard University Press, the United States.

¹⁸ Talmadge Caitlin, 4.

¹⁹ Ginsburg Tom, Simpser Alberto, 4.

²⁰ Huang Zheping: "China's President Xi Jinping Now Has a Dozen Titles, and Counting", *Quartz*, 1/ 2017, <https://qz.com/892208/chinas-president-xi-jinping-now-has-a-dozen-titles-and-counting/>, (27.5.2018).

As the head of state, this offers Xi a free hand to focus on fortifying his leadership and also the party's authority without letting anyone hamper the development of both. By appointing Wang Qishan - a retired Politburo Standing Committee member - as the new Vice President of China, and also removing the two-term limit for the Vice-President, Xi has allowed Wang to conduct presidential responsibilities on his behalf.²¹ Wang, also known as Xi's "American hand", owing to his vast knowledge and experience in dealing with the US's politics and economy, has been constantly with Xi in his anti-corruption drive.²² As for the role of the vice president, according to Article 82 of China's constitution²³:

The Vice-President of the People's Republic of China assists the President in his work.

The Vice-President of the People's Republic of China may exercise such functions and powers of the President as the President may entrust to him.

Although the role of the Vice President is usually ceremonial, Wang yields more power and influence than his predecessors. Xi too appears determined to empower him, especially in his anti-corruption drive and foreign policy dealings.

Another shot at power consolidation is the setting up of the new National Supervision Commission (NSC) - an important domestic administrative anti-corruption agency which will merge all important elements of the Communist Party, government, judiciary and police into one powerful agency. It is China's latest discipline-enforcement body ranked with the central government, which will work closely with courts to interrogate and detain not only members of the CCP but also corrupt officials of various state-owned enterprises, municipal and village bodies and educational, sports and cultural institutions.²⁴ Such intense consolidation of decision-making power is seen with caution, as the Party Politburo's Standing Committee as well as all the other leaders of provinces are of President Xi's choosing. However, notwithstanding the claims that a robust all-encompassing Supervision Commission will strengthen China's rule of law, it might actually be detrimental and make the system vulnerable to political manipulation.

Moreover, such centralisation of power in one individual is the antithesis of what Deng Xiaoping did in the 1980s to make the governance system more systematic. He had set in place a new mechanisms, which included the

²¹ "Wang Qishan Elected Vice-President of China", *Xinhuanet*, 3/2018, http://www.xinhuanet.com/english/2018-03/17/c_137045280.htm, (27.5.2018).

²² "Wang Qichan returns as Vice President", *China Digital Times*, 3/2018, <https://chinadigitaltimes.net/2018/03/wang-qishan-returns-as-vice-president/>, (27.5.2018).

²³ "Constitution of the People's Republic of China" The State Council PRC, http://www.npc.gov.cn/englishnpc/Constitution/2007-11/15/content_1372966.htm, (27.5.2018).

²⁴ Gueorguiev Dimitar, Stromseth Jonathan: "New Chinese agency could undercut other anti-corruption efforts", *Brookings*, 3/2018, <https://www.brookings.edu/blog/order-from-chaos/2018/03/06/new-chinese-agency-could-undercut-other-anti-corruption-efforts/>, (27.5.2018).

reinstitution of the posts of President and Vice-President but with a term limit of two years and mandatory retirement ages. This was to prevent over-concentration of power and one-man shows from happening again like in Mao's era.²⁵ Having "collective leadership" was more important. By breaking this pattern, Xi has now created doubt and insecurity in the minds of many, making them reminisce China's old days of personality cults and chaotic domestic politics.

According to many experts however, these amendments are necessary considering the domestic shifts China is undergoing. Its economy is under stress, experiencing a growth rate of about 6.7 in 2016, which is now called the "new normal". It was the lowest rate since 1990.²⁶ Moreover, achieving a high growth rate is important to push Xi's flagship – BRI – forward. Currently, it requires long-term planning and utmost engagement with international bodies. Under these circumstances, it is crucial to have a stable, forward-thinking leadership. Besides, even the anti-corruption drive needs a long-term action plan which only a strong leadership under Xi can implement.

When scrutinised, the government restructuring that China is undergoing now is the biggest since Zhu Rongji, a former Premier who initiated the liberalising economic reforms in the 1990s.²⁷ The current government reorganisation involved creating seven new ministries – ecological environment; natural resources; emergency management; agriculture and rural affairs; culture and tourism; veterans affairs; and the National Health Commission.²⁸ China's different administrative controls have been tightened and constricted under special centrally operating agencies. For instance, the banking and insurance agencies have been merged and special central agencies have been formed to manage immigration issues and those of military veterans.²⁹ While these administrative changes are meant to streamline the work done by the different ministries and improve their efficiency and ensure accountability, there are

²⁵ Yan Jun: "Reported in Decrypting the 1982 Constitution: Abolishing the Tenure of Leading Officials", *PLA Daily Client*, 12/2014, http://www.81.cn/jsdj/2014-12/03/content_6253829_2.htm, (27.5.2018); Zhifei Wu: "Deng Xiaoping: My last role is to take the lead in establishing a retirement system", *People's Daily- CCP news*, 8/2014, <http://dangshi.people.com.cn/n/2014/0812/c85037-25452561.html> (27.5.2018).

²⁶ Allen Katie: "Chinese Growth Slips to Slowest Pace for 26 Years", *The Guardian*, 1/2017, [https://www.theguardian.com/business/2017/jan/20/chinese-economic-growth ...](https://www.theguardian.com/business/2017/jan/20/chinese-economic-growth-...), (27.5.2018).

²⁷ Kui-wai Li (2001): "The Two Decades of Chinese Economic Reform compared", APEC Study Centre City, University of Hong Kong, *China and World Economy*, No. 2.

²⁸ Zhang Shu, Lee Se Young: "China to merge regulators, create new ministries in biggest overhaul in years", *Reuters*, 3/ 2018, <https://www.reuters.com/article/us-china-parliament/china-to-merge-regulators-create-new-ministries-in-biggest-overhaul-in-years-idUSKCN1GP003>, (27.5.2018); "An overhaul of China's bureaucracy enhances the party's authority", *The Economist*, 3/ 2018, <https://www.economist.com/china/2018/03/15/an-overhaul-of-chinas-bureaucracy-enhances-the-partys-authority>, (27.5.2018).

²⁹ Ibid.

opposing views which find such tightening of governmental administrative bodies to be draconian.

However, it would be unfair to argue that these changes have not been long cherished. The pitfalls of the Chinese economy and polity were lamented by the previous leaders as well. For Wen Jiabao in 2007, China was characterised by “four ‘uns’” – unbalanced, unstable, uncoordinated and unsustainable.³⁰ His successor, Li Keqiang, shared similar thoughts. Until now, maintaining the economy and other domestic issues were overseen by the Premier and Leading Small Groups (LSGs). But since the Third Plenum in 2013, the economy has come a lot under Xi Jinping’s radar, who from time to time has been recorded arguing that only massive reforms and developmental changes can help China become a superpower by 2049.³¹

3. Historical Underpinning

According to political pundits, the likely course China will take in the future will depend on the developmental path Xi Jinping undertakes. A very clear delineation is given by David Shambaugh in his book *China’s Future*.³² Shambaugh projects four possible trajectories for China –hard authoritarianism, neo-totalitarianism, soft authoritarianism and semi-democracy. Since Xi Jinping entered office, he argues, China has been adopting policies seen as more and more authoritarian. Shambaugh contends that such concentration of power suggests weak internal dynamics, which is bound to stagnate China’s economic progress and lead to acute social discomforts.

In the past, China’s other leaders had time and again emphasised on China attaining the status of a great power but within a more democratic setting. Hu Jintao, for example, said that the Chinese people were to become the “masters of the country” with the right “to be informed, to participate, to be heard, and to oversee”.³³ In this regard, even the CPC would not be spared from scrutiny of its decision-making and exercise of power. Likewise, the then Premier Wen Jiabao, in a meeting at the Brookings Institution in Beijing in 2006, discussed the significance of democracy, arguing that “democracy is a universal value that

³⁰ “China Confident in Maintaining Economic Growth: Premier”, *Xinhua News Agency*, 3/2007, <http://www.china.org.cn/english/2007lh/203252.htm>, (27.5.2018).

³¹ “Decision of the Chinese Communist Party Central Committee on Several Major Questions about Deepening Reform”, Third Plenary Session of the 18th Central Committee of the CPC , 11/ 2013, http://www.china.org.cn/china/third_plenary_session/2014-01/16/content_31212602.htm, (27.5.2018).

³² Shambaugh David (2016) :*China’s Future*, Malden, MA: Polity Press, UK, 2-6.

³³ Fook Liang Lye (2008): “China’s Measured Media Liberalization: Gearing up for the Beijing Olympics”, *EAI Background* brief no. 392.

includes the three important components: elections, judicial independence, and supervision based on checks and balances”.

Until 2009, CCP was known amongst foreign policy analysts to be following a system of “resilient authoritarianism” which involved loosening of political controls and reforming the political institutions, especially during the last four years of Jiang Zemin’s tenure and in Hu Jintao’s first six years in office.³⁴ Such reforms were characterised by “consultative democracy”³⁵ and “multiparty cooperation”,³⁶ which implied that party consultation was expanded to include non-party elements such as civil society and intellectuals. Retirement ages and term limits were enforced on the leaders. To forestall collapse like that of the Soviet Union, the CCP thought it was absolutely necessary to liberalise Chinese political reforms as a softer form of authoritarianism.³⁷

However, quivering the pitch were the riots in Lhasa in 2008 and Urumqi in 2009. The unnerved party tightened the political security apparatus. Bureaucracies consolidated their power, and according to Shambaugh they coalesced into an “Iron Quadrangle” comprising the party propaganda apparatus, the state-owned-enterprise sector, internal security organ (the Ministry of State and Public Security) and the People’s Liberation Army (PLA) forces. They not only reversed all the previous political reforms, but also tightened party control and security, using Hu Jintao as a susceptible puppet, manipulating him to gain massive financial gains as well.

In 2012, with the 18th Party Congress, a new leadership led by Xi Jinping signalled the coming of more systematic planning. It became even clearer in the Third Plenum held in November 2013 that Xi was going to change the functioning of China’s economic foundation, with the communiqué titled “Decision on Major Issues Concerning Comprehensively Deepening Reforms”.³⁸

But in the third quarter of 2012 when real GDP growth fell to 7.4 per cent - the seventh consecutive quarter of falling growth³⁹ - again to be followed

³⁴ Ibid.

³⁵ “Consultative democracy” was first included in political reforms in China in 2012 in a report given by President Hu Jintao at the 18th CPC National Congress. CPPCC is China’s main platform for consultative democracy, and involves representatives from CPC and non-CPC parties, those without any affiliation, civil societies and ethnic minorities, fn1.

³⁶ CPC is the main party exercising political leadership on a political ideology and policy decisions but there are other parties, subject to CPC’s leadership. A consensus on socialism with Chinese characteristics is the foundation of this multi-party cooperation system, fn2.

³⁷ Shambaugh David, 8.

³⁸ “The Decision on Major Issues Concerning Comprehensively Deepening Reforms in brief”, Third Plenary Session of the 18th Central Committee of the CPC 11/2013, http://www.china.org.cn/china/third_plenary_session/2013-11/16/content_30620736.htm, (27.5.2018).

³⁹ “Economic and Monetary Developments – The external environment of the euro area”, *ECB Monthly Bulletin*, 1/2013, 11-12.

by a downfall of 6.9 percent and 6.6 per cent in 2015 and 2016 respectively - a 25-year low - the government itself lowered its annual target growth rate to a “normal 6.5 percent” for the next five years.⁴⁰ So, this new juncture that China is at, with hardened political reforms and an unstable economy, is being looked at as destabilising the Xi regime by many political scientists. In 2006, Minxin Pei described China’s economic condition as a “trapped transition”, where it is constrained by the repressive political structure as a superstructure. Ian Bremmer predicted that even though China has embraced globalisation to some extent, lack of transparency in government functioning is bound to make the economy, and concomitantly the regime, unstable.⁴¹ Zbigniew Brzezinski in *The Grand Failure* (1989) also makes akin arguments, though in the context of the Soviet Union. A moribund economy when combined with a political system marked by deep-seated insecurity, only leads to more hollowing out of power, control and mobilisation of the regime.

What is surprising is that Xi’s consolidation of unrestricted power has become emblematic of not just his supremacy, but also his perceived fragility.⁴² In the process of making himself the most powerful in China since Mao, he has earned himself a significant number of enemies. Xi is aware that his power stays as long as he wields the apparatus of the state and the party. Consequently, he has ruthlessly eliminated any group or individual that could pose a threat to his authority. He has jailed and purged numerous generals and tycoons on corruption charges, belonging even to the powerful PLA.⁴³ His approach is based on the guiding themes of controlled and fervent nationalism, focusing on the state being in control of everyday public lives.

If not deftly managed, such intense consolidation can become risky for Xi. Targeting the elites or purging them incessantly will undermine the elite support and weaken Xi’s support within the elite groupings. This might motivate rival domestic groups or competitors to fortify their stance against Xi. Though this seems far-fetched, a string of policy failures can very well destabilise the current regime.⁴⁴ Moreover, to realize the “Chinese Dream” today, China must tackle

⁴⁰ Yao Y. (2014): “A New Normal, but with Robust Growth: China’s Growth Prospects in the Next 10 Years”, 77–82.

⁴¹ Bremmer Ian, “China’s rising influence ‘inevitable’”, CCTN, 11/ 2017, https://news.cgtn.com/news/7863444d35597a6333566d54/share_p.html, (27.5.2018).

⁴² Svobik Milan (2009), “Power Sharing and Leadership Dynamics in Authoritarian Regimes,” *American Journal of Political Science* 53, no. 2, 477–494.

⁴³ Chellaney Brahma, “Xi’s new strength obscures China’s internal risks”, 10/2017, *The Japan Times*, <https://www.japantimes.co.jp/opinion/2017/10/29/commentary/world-commentary/xis-new-strength-obscures-chinas-internal-risks/>, (27.5.2018).

⁴⁴ Pikner Stephan: “Fewer Checks, More Balancing: How Xi Jinping’s Consolidation of Power Changes the Risk of War”, *The Bridge*, 3/2018, https://www.realcleardefense.com/articles/2018/03/29/fewer_checks_more_balancing_how_xi_jinpings_consolidation_of_power_changes_the_risk_of_war_113257.html, (27.5.2018).

a number of critical issues like environmental pollution, poverty, corruption, abuses of power, demographic imbalance, food safety and energy consumption inefficiency among others. While Xi has demonstrated good accountability and a better appetite for risk-taking, domestic turmoil resulting from such problems could raise the stakes for him. Considered together, Xi's centralization of power and elimination of rivals is moving the CCP regime towards a situation, which in its generic form, is prone to instability. That is all the more reason why China needs to have a stable neighbourhood and maintain the regional balance of power while rapidly modernising its PLA. Other Asian democracies like Taiwan, Japan, South Korea and India are not taking well to China using instruments of coercive diplomacy while also breaching international rules to secure its interest in the region.

4. Juggernauting Foreign Policy

Just as Deng Xiaoping had steered China's economic rise in the 1970s and made its presence felt globally,⁴⁵ Xi too is striving relentlessly through an assertive foreign policy to raise China's stature in international geopolitics.⁴⁶ Most recently, through BRI, the grandest strategy so far, China has launched colossal infrastructure programmes worth trillions of dollars to improve connectivity, trade and investment between Asia, Africa and Europe.⁴⁷ While over 70 countries have agreed to partake in the various developments, there are several nuances that have to be taken care of, such as building basic infrastructure in the poorly connected regions of Asia and Africa, attracting global investors to participate, ensuring large-scale participation from emerging markets, capitalising on those markets while taking care of environmental concerns and, most importantly, ensuring that China does not end up hegemonising the smaller powers.⁴⁸ Xi has

⁴⁵ Chow G.C (2004): "Economic reform and growth in China. *Annals of Economics and Finance*", 152; "From Deng to Xi – Economic reform, the Silk Road and the return of the Middle Kingdom, Special Report", *LSE Ideas*, 5/ 2017; Morrison W.M. (2013): "China's Economic Rise: History, trends, challenges, and implications for the United States", Library of Congress, *Congressional Research Service*, 2–37.

⁴⁶ J.A. Bader: "How Xi Jinping Sees the World ... and Why", *Asia Working Group*, Foreign Policy, Brookings, 2/2016; Zhang Jian (2015): "China's New Foreign Policy under Xi Jinping: Towards 'Peaceful Rise 2.0'?", *Global Change, Peace & Security*, 1, 5-19; Hass R. et al. (2017): "The Trajectory of Chinese Foreign Policy: From reactive assertiveness to opportunistic activism", *Center for East Asia Policy Studies*, Brookings Institute.

⁴⁷ Miller Tom (2017): *China's Asian Dream: Empire Building along the New Silk Road*, Zed Books, London, 5-9.

⁴⁸ Cai Pete (2017): "Understanding China's Belt and Road Initiative", *Lowy Institute for International Policy*, https://www.lowyinstitute.org/sites/default/files/documents/Understanding%20China%E2%80%99s%20Belt%20and%20Road%20Initiative_WEB_1.pdf, (27.5.2018).

already revealed China's hegemonic goals of becoming a global superpower and a modern socialist industrial state by the time it is the centenary of China, i.e. 2049.⁴⁹ For such grandiose goals to bear fruit it is important to lay a strong and resilient foundation now. An unlimited term limit hence gives President Xi more elbow room and continuity to manoeuvre in materialising his economic and political reforms.

This visualisation also includes upgrading China's military and defence capabilities for it to become an indestructible fighting force by 2035. Massive defence outlays are being initiated by various means like expansion of naval bases, investments in strategic ports, development of cutting-edge technologies, cooperation with likeminded countries, etc. In fact, as informed by the state media, China is going to spend US\$175 billion across all the divisions of the PLA. The military spending got incremented by 8 percent this year compared to 7 percent in 2017. However, if one sees China's aspirations of satiating its 'China dream', one will realise that having a 'strong military dream' is a very crucial component of that dream. President Xi's grand strategy of making 'China great again' too is intrinsically connected to that yearning. China already has the world's second-largest military budget, largest navy and maritime militia, and is experiencing the fastest and biggest shipbuilding expansion.⁵⁰ Undoubtedly, all of this is buttressing its profile as a great power and establishing popular support domestically, especially amongst those sections fervent about national rejuvenation and restoring China's historical statute.

Not just in the military sphere, China has cast its pre-eminence worldwide. It has extended its definition of "core interests" to even include the South China Sea and has asserted sovereignty rights over it, contrary to international law, i.e. United Nations Convention on the Law of the Sea (UNCLOS).⁵¹ China has always rejected, or rather challenged, the idea of a Western model of growth and development, western values like the idea of democracy being most suitable for

⁴⁹ Callahan William (2016): "China 2035: from the China Dream to the World Dream", *Global Affairs*, 2:3, 247-258.

⁵⁰ "China Modernizing Military by Increasing Spending by 8 Percent", *Special Operations*, 3/2018, <http://specialoperations.com/32630/china-modernizing-military-increasing-spending-8-percent/>, (27.5.2018).; "China boosts military spending 8% amidst ambitious modernization drive", *CNN* 3/2018, <https://edition.cnn.com/2018/03/04/asia/chinese-military-budget-intl/index.html> (27.5.2018); "China boosts defense budget in quest for 'world class' military but tells neighbors not to worry", *The Washington Post*, 3/2018, https://www.washingtonpost.com/world/asia_pacific/china-boosts-defense-budget-seeking-world-class-military-but-tells-neighbors-not-to-worry/2018/03/05/17a27efb-2a9d-4508-a06e-f3129bd1ea45_story.html?noredirect=on&utm_term=.aae5259ed0ca, (27.5.2018).

⁵¹ T. James: "The South China Sea Dispute: China's Polygonal Defence of Core Interests", *RUSI*, 7/2016, <https://rusi.org/commentary/south-china-sea-dispute-chinas-polygonal-defence-core-interests>, (27.5.2018); "Chinese South China Sea Claims" *Global Security* <https://www.globalsecurity.org/military/world/china/south-china-sea.htm>, (27.5.2018).

economic progress. For instance, by creating an alternative global governance structure through cooperative mechanisms like BRICS (Brazil, Russia, India, China and South Africa), the Asian Development Bank (ADB) and the Shanghai Cooperation Organisation (SCO), China is seeking to have a far-reaching bearing on the liberal global order previously led by the West.⁵²

In fact, China has gone as far as to set up firewalls to control its internet and prevent Chinese citizens from getting exposed to western ideas. However, this is where China lags. By controlling the media, it manifests a certain level of vulnerability and coyness. The general perception around the world is that not much has changed in China since Mao Zedong's time, who created self-destructing policies, which resulted in mayhem and led to thousands of deaths. His authoritarian regime had cost China heavily. Though Xi is exercising his power prudently and recent developments suggest that under his rule China cannot be considered as a traditional totalitarian state, his assertive foreign policies and bold domestic reforms are spewing much concern.

When it comes to asserting China's foreign policy, Xi is coalescing "bringing-in" and "going-out" initiatives, actively pursuing it through these foreign policy propositions:

- "a new type of major-power relationships";
- "major-country diplomacy with Chinese characteristics";
- "a community of common destiny";
- "a new type of international relations".

All of these propositions have different connotations when engaging with countries across the world - juxtaposed between win-win cooperation and zero-sum rivalry. The main strategic ambition however is twofold: (a) As a staunch advocate of economic globalisation, China seeks to enhance its position as a global leader equal at par with the US; and (b) China wants to lead international affairs by pursuing shared benefits through collaboration and consultation between various countries and organizations, particularly focusing on Asia-Pacific.

Sino-US relations figure broadly in China's proposition of this "new type of major-power relations".⁵³ As Wang Qishan, the most experienced politician on the US, is already positioned as Xi's right hand, Xi foreign administrative strategy will without doubt be more US-centric than before.⁵⁴ China views

⁵² Haibin Niu (2013): "BRICS in Global Governance a Progressive and Cooperative Force?" Friedrich Ebert Stiftung, 9/2013; Rewizorski M. (2015): "The European Union and the BRICS: Complex Relations in the Era of Global Governance, 1-180.

⁵³ Lampton David: "A New Type of Major-power Relationship: Seeking a Durable Foundation for U.S.-China Ties", *China & US Focus*, 9/ 2013, <https://www.chinausfocus.com/foreign-policy/a-new-type-of-major-power-re...>, (27.5.2018).

⁵⁴ Mitchell Tom: "Xi Jinping Ally Wang Qishan Confirmed as New China Vice-President", *Financial Times*, 3/2018, <https://www.ft.com/content/aa260008-28d3-11e8-b27e-cc62a39d57a0>, (27.5.2018).

President Donald Trump's retreating from the TPP - the Asia-Pacific multilateral trade grouping - as a strategic opportunity to spread its influence all across Asia. Whether it is in South Asia, Southeast Asia or East Asia, China's key foreign policy goal as stated by the government is to ensure regional stability, fostering the principles of good state-to-state relations in international relations through mutual respect, win-win cooperation and promoting fairness and justice.

Committed to the "bringing-in" initiative, Xi has so far hosted a number of seminars and conferences ranging from the May 2014 Conference on Interaction and Confidence Building Measures in Asia (CICA), the November 2014 Asia-Pacific Economic Cooperation (APEC) summit, September 2016 Group of Twenty (G20) summit, the May 2017 BRI forum, the September 2017 BRICS summit, the Shanghai Cooperation Organisation (SCO) summit etc. Likewise, for his "going-out" campaign, Xi has travelled extensively to over fifty countries in his first term, paid visits to the headquarters of different regional and global organisations and has delivered multiple speeches overseas. For the BRI, China has engaged in interactions with 16 Central and Eastern European Countries (CEEC), signing Memorandum of Understanding with most of them to work on priority areas of cooperation like trade and investment, logistics, financial and technological cooperation and promoting tourism, sport and culture.

Thus, it can be seen that China is extending its interests and influence much beyond Asia-Pacific to Europe and Africa as well. Strengthening bilateral and multilateral links, enhancing maritime security, pursuing economic cooperation through free trade agreements (FTAs) in addition to consolidating regional integration and connectivity are some of the key features of China's foreign policy outreach. It has been highlighted well in the January 2017 Chinese White Paper, titled *China's Policies on Asia-Pacific Security*.⁵⁵ To secure his grand Asia-Pacific propositions, Xi has intensified work on the New Development Bank (NDB) under BRICS, the Asian Infrastructure Investment Bank (AIIB) and the new Silk Road Fund (SRF) under BRI. Pointed out by Trump to be revisionist in nature, these initiatives definitely reflect the changing nature of the status quo of the landscape through rapid infrastructure developments and effectual trading strategies.⁵⁶

It is certain that China does not trust the US, India, Australia and Japan forming the Quadrilateral initiative. It might in fact buttress China's attention more on the Asia-Pacific. Moreover, Trump's vague Asia policy does not provide any assurance to the smaller countries, thus egging them to hold on to China's

⁵⁵ China's Policies on Asia-Pacific Security Cooperation, State Council Information Office of the People's Republic of China, 1/2017, http://www.xinhuanet.com/english/2017-01/11/c_135974121.htm, (27.5.2018).

⁵⁶ National Security Strategy of the United States of America, White House, 12/2017, <https://www.whitehouse.gov/wp-content/uploads/2017/12/NSS-Final-12-18-20...>, (27.5.2018).

support and use it as an opportunity.⁵⁷ South Asian countries as well are drawn towards China's initiatives there, often known as China's "infrastructure-led investment policy".⁵⁸ Through Special Economic Zones (SEZs) and the US\$57 billion China-Pakistan Economic Corridor China is tilting more towards the Central and Middle Eastern markets.⁵⁹

Lastly, the coming years will see Xi intensifying the stature of BRI across the world, marked by Beijing signing multilateral and bilateral deals, boosting connectivity through economic corridors and forging stronger political contacts. It will not only provide an impetus to China's economic development but also address issues of poverty, economic inequality etc.⁶⁰ However, it is certain that testing times are arriving for immediate neighbours like India who are not completely in sync with China's connectivity projects.

5. India Playing Catch-up

With Xi Jinping assiduously assuring his tenure while incorporating all the said "lost territories" of China, it has become quite understandable that there is no stopping China from pursuing expansionist activities.⁶¹ In essence, since he has come to power, China has assertively begun to secure territories in its periphery, be it the East China Sea, South China Sea or strategic ports in the Indian Ocean. Such incremental acts of territorial occupation are now being commonly referred to as China's grand strategy of salami slicing.⁶² China has in fact succeeded in conducting stealth military operations which when accumulated over time can actually result in large territorial gains from neighbouring territories. For

⁵⁷ Loh Dylan: "How Xi Jinping's 'Lifetime Presidency' Could Change China – For Better or Worse", *The Conversation*, 2/ 2018, <http://theconversation.com/how-xi-jinpings-lifetime-presidency-could-change-china-2018-02-15>, (27.5.2018).

⁵⁸ Hashmi Rehana: "China's ambitions abroad : The case of South Asia" IAPS Dialogue, 2/2018, <https://iapsdialogue.org/2018/02/15/chinas-ambitions-abroad-the-case-of-the-south-asian-region/>, (27.5.2018).

⁵⁹ Pant V. Harsh.: "China's clout grows in South Asia, but can India raise its game?" *South China Morning Post*, 1/ 2018, <http://www.scmp.com/comment/insight-opinion/article/2129480/chinas-clout-grows-south-asia-can-india-raise-its-game>, (27.5.2018).

⁶⁰ Full text of President Xi's speech at opening of Belt and Road forum, 5/2017, http://www.xinhuanet.com/english/2017-05/14/c_136282982.htm, (27.5.2018).

⁶¹ Fravel M. Taylor (2010): "International Relations Theory and China's Rise: Assessing China's Potential for Territorial Expansion", *International Studies Review*, 12, 505–532

⁶² Miller Tom (2017): *China's Asian Dream: Empire Building along the New Silk Road*, Zed Books, London, 41.

⁶³ It involves subtle piece-by-piece expansionism, where every new piece of occupation is not momentous enough to ignite a war but when considered together after a period of time is momentous enough to radically alter the balance of power, fn3.

instance even in the South China Sea, China's position is much tougher than it was a decade ago.⁶⁴

China's approach with India has more or less been the same in the past decade. Most recently, apart from the Doklam standoff between the two countries, there has been no dramatic difference in the way Xi or the previous leaders in China dealt with India. They have always shown the same proclivity in maintaining harmonious relations with India, at least on paper. During Deng Xiaoping's time, China was pursuing an "open-door" policy and relations with India were rather modest, normalised more when then Indian Foreign Minister A.B. Vajpayee's visited China in 1979 and then Prime Minister Rajiv Gandhi's visited it in 1988.⁶⁵ China under Jiang Zemin and Hu Jintao pursued "greater conservatism" where it was focusing majorly on domestic economic growth while keeping a low profile in the international scene.⁶⁶ China and India were also engaging in various confidence-building measures (CBMs) in 1993 and 1996 to thrust their then passive relationship forward. This got more institutionalised during Hu Jintao's leadership, with the signing of multiple agreements and memorandums of understanding (MoUs).

However, with Xi in power, strategists are claiming that China is expanding its claims on the Indian territory by making use of the poor infrastructure in border areas and the inability of the Indian armed forces to be stationed in every nook.⁶⁷ The connectivity of these bordering areas to the rest of the country is also deplorable. For instance, China is targeting some of the most strategic but difficult terrains of India, such as in the volatile regions of Ladakh's Deshang and Chumar areas.⁶⁸ The encroachment in the state of Arunachal Pradesh and more recently in a tri-junction in Bhutan which gives direct access to India is a grave threat through India's Chicken Neck, the narrow Siliguri corridor.⁶⁹

Now with Xi continuing his term, there are three options for India - it can mend its frosty ties with China, accede to their demands and get into their good books, it can pursue an antagonistic foreign policy and club with other major powers against China, or pursue a diplomatic and 'smart' foreign policy which while aligning with major powers also heeds China's sensitivities. The present

⁶⁴ Zhang Feng (2017): "Chinese Thinking on the South China Sea and the Future of Regional Security", *Political Science Quarterly*, 132:3.

⁶⁵ Gonsalves Eric: "The India-China Parleys (1979-1982)", *Indian Foreign Affairs Journal*, 10-12/2013.

⁶⁶ Lanteigne Marc (2009): "Who Makes Chinese Foreign Policy Today?", *Chinese Foreign Policy: An Introduction*, Routledge, London, 19.

⁶⁷ Goswami Namrata (2012): "China's Territorial Claim on Arunachal Pradesh", IDSA Occasional Paper no. 29.

⁶⁸ Chellaney Brahma: "China's Game Plan to Keep India on the Back Foot", *Livemint*, 7/2013, <https://www.livemint.com/Opinion/RQ477pBeAEWGgsbmQ2FaCL/New-Delhi-and-Chinas-game-plan.html>, (27.5.2018).

⁶⁹ Goswami Namrata, 15.

Indian Government seems to be pursuing the third option. Bigger risks exist for India now, with China lashing out strong headwinds if it feels its 'core interests' are at stake.⁷⁰

China has already improved military relations with Russia, India's oldest friend, and even made it a big player in the BRI, along with several other countries in India's neighbourhood. The trade deals China is seeking to secure with them is bound to lure them all into China's orbit. The United States too is no longer reliant on West Asia for oil, thus opening the road for China to be India's major competitor for these resources.

There are talks among Chinese officials of something called "oriental wisdom", mostly involving using the Five Principles of Peaceful Coexistence within the ambit of Panchsheel to settle political differences.⁷¹ This essentially requires 'political' understanding between the two countries at the highest political level. So, for now there are only dialogues taking place between the Special Representatives (SR) through boundary dispute negotiations, Disputed Areas Dialogue Group and Border Movement Management and Monitoring Group.

Yang Jiechi, the Chinese interlocutor for the SRs dialogue, was promoted to state council or at the 19th National Congress.⁷² As both Wang Yi and Yang Jiechi - two important officials in current Chinese political system - have rich experience in dealing with Asian affairs,⁷³ better cooperation and dispute settlement should be facilitated, despite unequal Gross Domestic Product (GDP) and asymmetrical military capabilities between the two countries.

Economic interdependence has usually been the pacifying effect on politically adversarial states. While India is more dependent on China than China is on India, both the countries' economies are export-driven. Being the largest countries in the region they cannot afford to ignore each other's presence, notably more because of the apprehensions of what the other power might do with any of their other rivals. What is required now is a 'smart-balancing' act

⁷⁰ Swaine Michael D., "China's Assertive Behavior Part One: On "Core Interests"", China Leadership Monitor, no. 34.

⁷¹ "Interview with Chinese Ambassador Le Yucheng by PT", *News from China*, 9/2014, 20-21; "Full Text of Li Keqiang's Speech at Opening Ceremony of Boao Forum", Ministry of Commerce, People's Republic of China, 4/2014, http://english.mofcom.gov.cn/article/zt_boaoforum2014/news/201404/201404..., (27.5.2018).

⁷² The National People's Congress of the PRC, http://www.npc.gov.cn/englishnpc/news/Appointments/node_2765.htm, (27.5.2018).

⁷³ "Yang Jiechi, border negotiator with India, promoted to elite CPC body", *The Times of India*, 10/ 2017, <https://timesofindia.indiatimes.com/world/china/yang-border-negotiator-with-india-promoted-to-elite-cpc-body/articleshow/61229050.cms>, (27.5.2018).; "Meet the team China expects to unknot ties with the United States", *South China Morning Post*, 3/2018, <http://www.scmp.com/news/china/diplomacy-defence/article/2137922/meet-team-china-expects-unknot-ties-united-states>, (27.5.2018).

with China.⁷⁴ Only informal meetings cannot be the ultimate barometer of measuring the effectiveness of having an active foreign policy. Especially for India in the face of an unpredictable Donald Trump, an insecure Japan and weak South Asian countries, not mending ties fast with China might constrict its diplomatic manoeuvres.

It is important for both India and China to reduce the tension points domestically and abroad. It is high time the relationship moves on from gunboat diplomacy to 'yacht diplomacy', implying a more relaxed and cooperative form of foreign policy manoeuvring which is not completely based on the principles of realism.⁷⁵ There is a larger context to India's relationship with China and that should not be wasted in vain. Although the relationship now is very personality driven – considering the hold Xi has on China and the temper President Narendra Modi has set for India – there is also a need to secure proper institutional backing.⁷⁶ The current bonhomie might not last long in the face of asymmetrical power capabilities, creating more space for confrontation than peace. Moreover, it is important for both countries to represent popular aspirations if long term goals are to be met. Settling frictions only based on the strong personalities representing the countries and the political ideologies they hold cannot suffice for good India-China relations.

Additionally, in order to bridge the gap between holding meetings and implementing policies, the backing of formal institutions is crucial. When it comes to India and China especially, meetings have not been able to be translated into concrete policies owing to several factors like political contentions, ego clashes, non-disclosure of information, deferred decisions etc. Therefore the onus should be more on settling the trust deficit between them as lately it has escalated due to an 'information deficit' as well.⁷⁷ Boosting mid-level political talks besides cultural exchanges and scholarly meets can prove beneficial.

Thus, Xi Jinping's extended leadership should be seen strategically, to manoeuvre enough elbow room to upgrade India-China relations. Abiding by the "developmental partnership" envisioned between the two countries during

⁷⁴ Jacob Happyman: "Smart-balancing China", *The Hindu*, 11/ 2017, <http://www.thehindu.com/todays-paper/tp-opinion/smart-balancing-china/article20946375.ece>, (27.5.2018).

⁷⁵ "China says it wants to stick to 'right path' of bilateral ties with India, explore new areas for cooperation", *First Post*, 5/2018, <https://www.firstpost.com/world/china-says-it-wants-to-stick-to-right-path-of-bilateral-ties-with-india-explore-new-areas-for-cooperation-4434095.html>, (27.5.2018).

⁷⁶ Thakker Aman: "Beyond Wuhan: India Should Establish A New Framework for Engagement With China" *The Diplomat*, 5/2018, <https://thediplomat.com/2018/05/beyond-wuhan-india-should-establish-a-new-framework-for-engagement-with-china/>, (27.5.2018).

⁷⁷ "Trust deficit led to Doklam standoff; Modi & Xi to bridge that gap", *The Times of India*, 4/2018, <https://timesofindia.indiatimes.com/india/trust-deficit-led-to-doklam-standoff-modi-xi-to-bridge-that-gap/articleshow/63902989.cms>, (27.5.2018).

Xi's visit to India in 2014⁷⁸ is consequential if close economic and political contacts are to be sustained. Post-Doklam, during the BRICS summit and the recent "informal" meet in Wuhan, China, Modi and Xi Jinping have articulated a stronger interest in pursuing a "forward looking constructive" relationship to further nurture their developmental partnership.⁷⁹ This forward thinking orientation of the two leaders should not be taken for granted, but translated into more meaningful engagements.

6. Conclusion

Xi's extension of power as the President of China implies a strong, institutionalised authoritarian regime having the full backing of the CPC and the PLA. The constitutional amendment bringing this forth provides a vital window into the working of Chinese domestic politics, offering a ground for a game of musical chairs – deciding who leaves and who stays. Additionally, to understand China's emerging precedence in global politics, it is important to juxtapose Beijing's bilateral and multilateral ties. Such precedence has several insinuations for neighbouring middle powers like India, Japan and South Korea. While China is securing stronger bilateral ties with them, multilaterally too there are testimonies of growing partnerships, especially through the Belt and Road Initiative. However, according to political pundits, the reason why Xi is pursuing such an active foreign policy is because he has to obscure China's internal risks in the face of domestic upheavals. Avoiding a political hard landing is important for Xi, especially after securing an unlimited term for himself.

It goes without saying that Beijing's foreign affairs have consequential bearing on its neighbouring powers. This is precisely why India should be well prepared to see more of China and Xi Jinping's influence in its foreign policies - economically, politically and militarily. India also needs to win back its old friends like Russia in the neighbourhood by timely implementation of existing agreements and proactively working towards newer areas of interest. However, when it comes to settling boundary disputes between India and China, continuity of Xi's leadership should not be treated negatively in its entirety. A change of China's government might have also changed its current foreign policy posture of strongly seeking to settle disputes. India should view this prudently and form a well-balanced outlook towards amending bilateral ties. It does not have to necessarily take place at the highest political level or at the bureaucratic level only, but

⁷⁸ Joint Statement between the Republic of India and the People's Republic of China on Building a Closer Developmental Partnership, Ministry of External Affairs (MEA), 9/ 2014

⁷⁹ India-China Informal Summit at Wuhan, MEA, 4/2018, [http://www.mea.gov.in/press-releases.htm?dtl/29853/IndiaChina+Informal+Summit+at+Wuhan\(27.5.2018\)](http://www.mea.gov.in/press-releases.htm?dtl/29853/IndiaChina+Informal+Summit+at+Wuhan(27.5.2018)).

can be opened to interactions between young scholars, businessmen, cultural enthusiasts etc.

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SI ĐINPINGOV AUTORITARIZAM, KINESKA SPOLJNA POLITIKA I INDIJA

Kineski predsjednik Si Đinping usredsredio se na konsolidaciju moći, fokusirajući se na domaće restrukturiranje kako bi učvrstio centralnost Komunističke partije Kine (KPK) i njenu komunističku ideologiju. Ovo je navelo političke analitičare da razmišljaju o tome da li je na snazi autoritarni kineski režim spoljne politike Si Đinpinga. Kina već pravi veliki regionalni pomorski napredak i koristi svoju ekonomsku moć nad svojom kontinentalnom periferijom. U tom smislu, rastu napetosti u indijsko-pacifičkom regionu sa zemljama poput Indije i Japana, koje se udružuju kako bi poništile dominaciju Kine. Bez obzira na to, nova sigurnosna arhitektura Azije zahteva uravnoteženo strateško manevrisanje, vidljivo na primeru Kine i Indije, koje unapređuju svoje bilateralne odnose, dok istovremeno sklapaju nove ugovore s drugim zemljama istog mišljenja.

Ključne reči: Si Đinping, autoritarnost, kineska spoljna politika, predsednički mandat Si Đinpinga, spoljna politika Indije, indijsko-kineski odnosi

CHINA'S ACCESSION TO THE WORLD TRADE ORGANIZATION: THE PROCESS AND THE EFFECTS**

The aim of the paper is to present and explain the changes that have arisen in China's trade and economy during the accession to the World Trade Organization (WTO) and during its membership in this organization. The article consists of four parts and a conclusion. At the beginning of the paper, China's negotiations with the GATT are briefly outlined, as well as the main obstacles for not accomplishing these negotiations successfully. The second part deals with the negotiations for the WTO membership and the most important changes China's economy has undergone to meet the membership requirements. This part of the paper also outlines the most important barriers to the membership, as well as economic reforms and the growth of the non-state economy in China. The third part explains how China, upon its accession to the WTO, has immediately involved in the Doha Development Round negotiations. This country became a member of several negotiating groups within the WTO and signed certain WTO agreements. Moreover, China has undergone a Trade Policy Review several times, which is a periodic obligation of every WTO member. The final section describes the most important changes in China's trade that have come out from full membership in the WTO. During the sixteen years of its membership in the WTO, China has achieved a never-before-seen rate of trade growth and took the leading position in the world trade. At the end of the paper, we conclude that China has fully integrated into the world economy and that becoming a member of the World Trade Organization has played a major role in this achievement.

Keywords: China, WTO, GATT, accession, economy, trade, Doha Development Agenda, negotiations.

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1. China and the General Agreement on Tariffs and Trade (GATT)

China was one of the 23 original signatories of the General Agreement on Tariffs and Trade (GATT) in 1948. After China's revolution in 1949, the government in Taiwan announced that China would leave the GATT system. Although the government in Beijing has never recognized this withdrawal decision, nearly 40 years later, in 1986, China notified the GATT of its wish to resume its status as a GATT contracting party.¹ The General Agreement on Tariffs and Trade formally received China's application on July 10, 1986. The GATT Accession Working Party was established by the Council on March 4, 1987.² The tasks of the Working Party on China's Status as a Contracting Party were to:

- examine the foreign trade regime of the People's Republic of China,
- develop a draft Protocol setting out the respective rights and obligations,
- provide a forum for the negotiation,
- address as appropriate other issues concerning the People's Republic of China and the GATT, including procedures for decision-making by the contracting parties,
- make recommendations to the Council.³

The Working Party on China's Status as a Contracting Party met on 20 occasions between 1987 and 1995. The strongest point of difference between China and the major GATT trading partners, even several of the Third World contracting parties who supported Chinese entry, was concentrated around some 'special safeguards' (emergency protective actions that an importing country could take) in relation to Chinese exports. The major industrial countries wanted China to agree to the application of 'selective safeguards' against its exports. In other words, to agree to the importing markets applying restrictions solely directed against China, with the aim to prevent what the importing countries consider to be a threat to their domestic producers by subsidized exports from China. The European Community, for example, sought to introduce concepts like 'surge in imports,' 'market disruption,' etc. - the terms used in the Multifibre Arrangement which will become GATT illegal under the Uruguay Round

¹ WTO, *WTO successfully concludes negotiations on China's entry*, https://www.wto.org/english/news_e/pres01_e/pr243_e.htm. (21.08.2017.)

² The members of the Working Party on China's Status as a Contracting Party were: Argentina, Australia, Austria, Bangladesh, Bolivia, Brazil, Canada, Chile, Colombia, Cuba, Czech, Republic, European, Communities, and, member, States, Finland, Hong, Kong, Hungary, India, Indonesia, Israel, Jamaica, Japan, Korea, Kuwait, Malaysia, Mexico, Myanmar, New, Zealand, Norway, Pakistan, Peru, Philippines, Poland, Romania, Singapore, Slovak, Republic, Sri, Lanka, Sweden, Switzerland, Thailand, Tunisia, Turkey, United, States, Uruguay, Zimbabwe.

³ GATT, "Working Party on China's Status as a Contracting Party", L/6191/Rev.7, <https://docs.wto.org/gattdocs/q/GG/L6199/6191R7.PDF> (01.07.2017.)

agreements. China also indicated its awareness of genuine concerns in some bilateral discussions, particularly from many of the developing countries, and expressed a desire to meet these concerns through other modalities rather than the 'selective safeguards' concepts. While China agreed that full market mechanisms did not operate in price formations of products on the domestic or export markets, they argued that considerable amount of changes and reforms were introduced and these would soon become effective. However, both the United States and the European Community advocated that the question of China acceptance to the GATT should be considered only after the Uruguay Round conclusion and establishment of its institutional arrangements.⁴

China has never formally completed its accession to the GATT. In the meantime, the 8th round (the last round) of multilateral trade negotiations, held under the auspices of GATT, ended in 1994. The Uruguay Round embraced 123 countries as "contracting parties." The Uruguay Round led to the creation of the World Trade Organization, with the GATT remaining an integral part of the WTO agreements.⁵ The broad mandate of the Uruguay Round was to extend the GATT trade rules to the areas previously exempted as too difficult to liberalize (agriculture, textiles) and to the increasingly important new areas previously not included (trade in services, intellectual property, investment policy, trade distortions).⁶

2. Economic changes during negotiations on the accession of China to the WTO

The Uruguay Round came into effect in 1995 with deadlines ending in 2000 (2004 in the case of developing country contracting parties) under the administrative direction of the newly created World Trade Organization. China decided to apply for the accession to the World Trade Organization under Article XII of the WTO Agreement. In a communication dated December 7, 1995, the Government of China applied for the accession to the Marrakesh Agreement establishing the World Trade Organization (WTO Agreement) pursuant to Article XII of the WTO Agreement. Following China's application and pursuant to the decision of the General Council on January 31, 1995, the existing Working Party on China's Status as a GATT 1947 Contracting Party was transformed into a WTO

⁴ GATT Working Party on China to resume in may (19 March 1993) <http://www.sunson-line.org/trade/process/during/03191093.htm>

⁵ Jelisavac Trošić Sanja (2015): *Pregovori u okviru GATT i STO*, Institut za međunarodnu politiku i privredu, Beograd, 31-32

⁶ Cline William (1995): "Evaluating the Uruguay Round", *The World Economy*, 18 (1): 1. doi:10.1111/j.1467-9701.1995.tb00198.x

Accession Working Party, effective from December 7, 1995.⁷ Finally, after almost 15 years of negotiations, China became a WTO member on December 11, 2001.

Initially, the Working Party on China's status was established under the GATT in 1987 and concerned only China's trade regime for goods. In 1995, it was converted to a WTO Working Party and its scope was broadened to include trade in services, new rules on non-tariff measures and rules relating to intellectual property rights. The chairperson of China's Accession Working Party was Ambassador Pierre-Louis Girard of Switzerland.⁸ The tasks of the Working Party were to examine the application of the People's Republic of China Government to accede to the World Trade Organization under Article XII and to submit to the General Council recommendations which may include a draft Protocol of Accession.⁹ The Working Party reviewed the foreign trade regime of China. The discussions and commitments resulting therefrom were contained in the Report of the Working Party on the Accession of China (paragraphs 15-342) and in the Draft Protocol of Accession (Draft Protocol), including the annexes.¹⁰ At the end of negotiations, the People's Republic of China acceded to the Marrakesh Agreement Establishing the World Trade Organization on the terms and conditions set out in the Draft Protocol on the Accession of the People's Republic of China.¹¹

Among other difficulties in the course of negotiations, the issue of customs valuation, for instance, came up during the accession process. The Report of the Working Party (November 1, 2001) reads: "Some members of the Working Party expressed concern regarding the methods used by China to determine the customs value of goods, in particular regarding the practice of using minimum or reference prices for certain goods, which would be inconsistent with the Agreement on Implementation of Article VII of the GATT 1994 (Customs Valuation Agreement)." In response, "The representative of China confirmed that, upon accession, China would apply fully the Customs Valuation Agreement

⁷ WTO, "Communication from China", WT/ACC/CHN/1, (07.12.1995), 1-2. The terms of reference and the membership of the Working Party are reproduced in document WT/ACC/CHN/2/Rev.11 and Corr.1.

⁸ The members of the Working Party on the Accession of China to the WTO were: Argentina, Australia, Bangladesh, Bolivia, Brazil, Canada, Chile, Colombia, Cuba, Czech, Republic, Ecuador, Egypt, European, Communities, and, Member, States, Hong, Kong, Hungary, India, Indonesia, Israel, Jamaica, Japan, Korea, Kuwait, Malaysia, Mexico, Myanmar, New, Zealand, Norway, Pakistan, Peru, Philippines, Poland, Romania, Singapore, Slovak, Republic, Slovenia, Sri, Lanka, Switzerland, Thailand, Tunisia, Turkey, United, States, Uruguay, Zimbabwe.

⁹ WTO, "Working Party on the Accession of China", WT/ACC/CHN/2, (2. April 1996.), 1

¹⁰ WTO, "Report of the Working party on the Accession of China", WT/MIN(01)/3, (10.11.2001.), Ministerial Conference Fourth Session, Doha, (9-13.11.2001.)

¹¹ Draft Protocol can be viewed on pages 155-176 of the Report of the Working party on the Accession of China.

(...).¹² This is just an example that illustrates the difficulties during China's negotiations on the WTO accession.

The admission of China to the WTO was preceded by a lengthy negotiation process and required significant changes in the Chinese economy. During the accession negotiations, China had to reform the trade regime in order to meet the WTO requirements. The pre-reform Chinese trade regime was dominated by between 10 and 16 Foreign Trade Corporations with effective monopolies in the import and export of their specified product ranges.¹³ The Chinese trade regime had the limited importance of conventional trade policy instruments such as tariffs, quotas and licenses that were absent or unimportant under the planning system. Price-based measures were unimportant since the imported quantities could be controlled through the monopoly trading corporations. The reform of China's trade regime during the WTO accession negotiations had four major dimensions: increasing the number and type of enterprises eligible to trade beyond the initial few centrally controlled foreign trade corporations; developing indirect trade policy instruments such as tariffs, licenses, quotas and duty exemption schemes; reducing and ultimately removing the exchange rate misalignments; and reforming prices so that they could play a role in guiding resource allocation. These reforms of the trading system were inextricably linked with the reform of the enterprise sector to allow indirect regulation through market-determined prices to replace direct regulation of enterprise outputs.¹⁴ The WTO accession process signified China's deeper integration into the contemporary world economy.

The biggest structural change in China's economy was the rapid growth of the non-state economy. Official figures, which are probably understated, show that employment in the non-state sector from 1989 to 1998, including individual entrepreneurs, private enterprises, foreign-invested enterprises, and enterprises established by investors from Taiwan, Hong Kong and Macao, have increased four-fold, from 21.51 million to 87.01 million, an average annual growth rate of just over 16% (see Table 1). Although the 17 million people added to the private sector between 1996 and 1998 cannot compensate completely for the 22 million workers dismissed from the state-owned enterprises in those years (much less than those dismissed from urban collectives, those newly added to the workforce and those switching from agricultural to non-agricultural employment), it

¹² Javorcika Beata S., Narciso Gaia (2017): "WTO accession and tariff evasion", *Journal of Development Economics* 125, 61-2.

¹³ Lardy Nicholas (1991): *Foreign Trade and Economic Reform in China, 1978-1990*, Cambridge: Cambridge University Press

¹⁴ Ianchovichina Elena, Will Martin (2001): "Trade liberalization in China's accession to WTO" *Journal of Economic Integration*, 424

nevertheless suggests the way China's economy is developing and where the new jobs will be created.¹⁵

Table 1. *Growth of the Non-State Economy, in million people*

Year	Private	Individual	Foreign	Taiwan, Hong Kong, Macao	Total	Percentage
1989	1.64	19.40	0.47	n/a	21.51	-
1990	1.70	21.00	0.66	n/a	23.35	8.60
1991	1.84	23.10	1.65	n/a	26.59	13.9
1992	2.23	24.70	2.21	n/a	29.14	9.60
1993	3.73	29.40	2.28	1.55	36.46	25.10
1994	6.48	37.80	4.06	2.11	50.45	38.40
1995	9.56	46.10	5.13	2.41	63.20	25.30
1996	11.70	50.20	5.40	2.65	69.95	10.70
1997	13.50	54.40	5.81	2.81	76.52	9.40
1998	17.10	61.10	5.87	2.94	87.01	13.70

Sources: Zhongguo siying qiye fazhan baogao (1999) (Beijing: Shehui kexue wenxian chubanshe, 2000), p. 33; and Zhongguo laodong tongji nianjian (Beijing: Zhongguo laodong chubanshe, various years); taken from Fewsmith Joseph (2001): "The political and social implications of China's accession to the WTO." *The China Quarterly* 167, p. 583.

During the negotiations, the most important and the most hotly debated topic in China was the anticipated accession to the World Trade Organization. After 13 years of efforts to achieve membership, the United States and China finally reached an agreement in November 1999. Shortly after that, the European Union and China came to an agreement. But as soon as a long-expected membership was on the verge of fulfillment, after years of presenting arguments with which the West kept trying to keep China out of the WTO, the prospect of actual joining set off a large number of speculations over the impact on China's economy. Many began questioning the benefits of membership. They were concerned that China's industries would be exposed to crippling competition, farmers would be hurt by the import of cheap and better quality foreign wheat and corn, while China as a nation would become entangled in a global capitalist network that would erode the country's sovereignty. In the worst-case scenario,

¹⁵ Fewsmith Joseph (2001): "The political and social implications of China's accession to the WTO" *The China Quarterly* 167, 582-3

China would become a servant to the United States.¹⁶ However, this scenario proved to be unrealistic.

The reforms in China during the negotiations (a 15-year period) included substantial tariff reductions and the dismantling of most nontariff barriers. Improved market access following the WTO accession was equally important. Few nations benefited from the participation in international trade as much as China did, or in such a brief period of time. In 1978, at the beginning of the reform era, China had about \$20 billion of foreign trade. In 2000 that figure rose to \$474 billion, which represented a 24-fold increase. This participation in global trade was critical for China's turning away from a pattern of nearly autarkic, capital-intensive growth to an export-led growth that exploits China's natural comparative advantage in cheap labor.¹⁷ However, the single most important impact of the WTO on China was the reinforcement of the directions in which China's economy and policy was moving during accession negotiations.

On November 11, 2001, the Government of the People's Republic of China accepted the Protocol on the accession of the People's Republic of China done at Doha on November 10, 2001. In terms of paragraph 2 of Part III of the Protocol, it entered into force on December 11, 2001.¹⁸ At the time of the accession, Chinese President Hu Jintao said that China's accession to the WTO was a milestone in China's reform and opening up, bringing them into a new era of further opening up. To join the WTO was a major strategic decision based on comprehensive analysis of the situation at home and abroad in order to push forward China's reform, opening up and socialist modernization drive.¹⁹ In the end, having undergone major structural reforms of her economy and becoming a member of the WTO, China made confident steps in the global marketplace, taking on one of the leading roles in the world trade.

3. China's sixteen years of WTO membership

The Working Party on the Accession of China to the WTO concluded almost 15 years of negotiations with China and agreed to forward some 900 pages of legal text for the formal acceptance by the 142 Member Governments

¹⁶ Fewsmith Joseph (2001): "The political and social implications of China's accession to the WTO" *The China Quarterly* 167, 573

¹⁷ Lardy Nicholas (1991). The figure for China's foreign trade in 2000 comes from Rongji Zhu (5. March 20001.): "Report on the outline of the Tenth Five-Year Plan for national economic and social development" at the Fourth session of the Ninth National People's Congress, China Central Television, trans, Foreign Broadcast Information Service, CPP20010305000112

¹⁸ WTO, "Protocol on accession of the People's Republic of China done at Doha" (10. November 2001), WLI/100, (20 November 2001.)

¹⁹ Permanent Mission of China to the WTO (2001): "China in the WTO: Past, Present and Future", The Tenth Anniversary of China's Accession to the WTO

of the WTO. Thirty days after China notified its acceptance of the agreement it legally became a member of the WTO.²⁰ China became the 143rd member of the World Trade Organization on December 11, 2001. Since 1995 China became the 15th economy that has joined the WTO pursuant to Article XII of the Marrakesh Agreement.

The World Trade Organization has a total of 164 members, of which 36 countries and customs territories became members in the period from 1996 to July 2016. Established in 1995, the World Trade Organization is the only global international organization that manages trade rules between countries. By providing a forum for governments to negotiate trade agreements and settle trade disputes, the organization aims to help governments solve their trade problems.

The Doha Development Round of negotiations began when China became a member of the WTO, so it actively participated in the negotiations from the first day. At the WTO Fourth Ministerial Conference held from November 9–13, 2001, ministers from all WTO members launched the Doha Development Agenda (DDA) and also approved China's accession to the WTO. Since the meeting took place just two months after the attack on the World Trade Center, some government officials called for greater political cohesion and saw the trade negotiations as a means to that end. Some even thought that a new round of multilateral trade negotiations could help the recovery of the world economy, which was weakened by recession and terrorism-related uncertainty.

The Doha Round was the first WTO trade round, which began in 2001 and remained unresolved after missing its official deadline of 2005. China was firmly devoted to the multilateral trading system and the successful conclusion of the Doha Round. China actively participated in all kinds of WTO activities, including regular Council and Committee activities and Doha Development Agenda negotiations. It also tried to help other developing countries, multilaterally, plurilaterally and bilaterally, in areas such as DDA and capacity building.²¹ Some viewpoints even suggest that China took over the leading role in WTO.²²

China is an observer to the Plurilateral Agreement on Government Procurement (GPA) and continues negotiating its accession thereto. It is also an observer to the Plurilateral Agreement on Trade in Civil Aircraft, and as a participant in the Information Technology Agreement (ITA) has agreed to its expansion. China submitted its notification of Category A commitments under the Agreement on Trade Facilitation and on November 4, 2015, it ratified the

²⁰ WTO, "Protocol on accession of the People's Republic of China done at Doha". More on China's negotiations to join the WTO can be found at https://www.wto.org/english/thewto_e/acc_e/a1_chine_e.htm.

²¹ Permanent Mission of China to the WTO (2001)

²² See Schlesinger Jacob M., (1 November 2017): "How China Swallowed the WTO", *The Wall Street Journal*, <https://www.wsj.com/articles/how-china-swallowed-the-wto-1509551308>

Agreement.²³ The Preferential trade arrangements (PTAs) that are being implemented by China as a WTO Member are the following ones:

- China is a provider of Duty-free treatment for the Least Developed Countries (LDC) (from July 1, 2010)
- China is a beneficiary of Generalized System of Preferences with Australia (from January 1, 1974), Japan (August 1, 1971), Kazakhstan (January 1, 2010), New Zealand (January 1, 1972), Norway (October 1, 1971), Russian Federation (January 1, 2010), Switzerland (March 1, 1972), Turkey (January 1, 2002).²⁴

Dispute cases initiated within the WTO dispute settlement mechanism involving China are as follows: 15 cases as a complainant, 39 cases as a respondent and 142 cases as the third party.²⁵

Regional Trade Agreements of China in force notified by the WTO are: ASEAN - China; Asia Pacific Trade Agreement (APTA); Asia Pacific Trade Agreement (APTA) - Accession of China; Australia - China; Chile - China; China - Costa Rica; China - Hong Kong, China; China - Republic of Korea; China - Macao, China; China - New Zealand; China - Singapore; Iceland - China; Pakistan - China; Peru - China; Switzerland - China.²⁶ Moreover, an early announcement has been made for two Regional Trade Agreements: The Cross-Straits Economic Cooperation Framework Agreement (ECFA) and China – Norway Bilateral Agreement.

Regarding the acceptance of the WTO multilateral instruments, China accepted the Protocol Amending the TRIPS Agreement (2005) on November 11, 2007. On September 4, 2015, China accepted the Protocol concerning the Trade Facilitation Agreement (2014).

Many countries formed coalitions within the WTO. These groups often spoke with one voice using a single coordinator or negotiating team. During the Doha Round of negotiations, China became a member of several groups in the negotiations:

- Asian developing members
- APEC (Asia-Pacific Economic Cooperation forum)
- Article XII Members²⁷

²³ WTO, www.wto.org.

²⁴ Details about Preferential trade arrangements of China can be found at: <http://ptadb.wto.org/Country.aspx?code=156>.

²⁵ Details about all cases can be found at: https://www.wto.org/english/thewto_e/countries_e/china_e.htm.

²⁶ Details about Regional Trade Agreements of China can be found at: <http://rtais.wto.org/UI/PublicSearchByMemberResult.aspx?MemberCode=156&lang=1&redirect=1>

²⁷ Article XII Members, or Recently Acceded Members (RAMs), i.e., countries that negotiated and joined the WTO after 1995, seeking lesser commitments in the negotiations because of the liberalization they have undertaken as part of their membership agreements.

- G-20²⁸
- G-33²⁹
- Paragraph 6 countries³⁰
- FANs (Friends of A-D Negotiations)³¹
- “W52” sponsors.³²

Upon the WTO accession, China became a party to the Agreement on Textiles and Clothing and was the subject to its rights and obligations. For all WTO members, quotas on textiles ended at December 31, 2004, but there was a safeguard mechanism in place until the end of 2008 permitting the WTO Member Governments to take action to curb imports in case of market disruptions caused by Chinese exports of textile products. China agreed to limit its subsidies for agricultural production to 8.5% of the value of farm output (according to Article 6.4 of the Agriculture Agreement). China also agreed to apply the same limit to subsidies covered by Article 6.2 of the Agriculture Agreement.³³

Also mandated in the WTO Agreement are Trade Policy Reviews, in which a member country's trade and related policies are examined and evaluated at regular intervals.³⁴ Significant developments that may have an impact on the global trading system are also monitored. For each review, two documents are prepared: a policy statement by the government of the member under the review, and a detailed report written independently by the WTO Secretariat. These

Excludes least-developed countries because they will make no new commitments, and EU members.

²⁸ Coalition of developing countries pressing for ambitious reforms of agriculture in developed countries with some flexibility for developing countries (not to be confused with the G-20 group of finance ministers and central bank governors, and its recent summit meetings).

²⁹ Also called “Friends of Special Products” in agriculture. Coalition of developing countries pressing for flexibility for developing countries to undertake limited market opening in agriculture.

³⁰ Group of countries with less than 35% of non-agricultural products covered by legally bound tariff ceilings. They have agreed to increase their binding coverage substantially, but want to exempt some products. (In paragraph 6 of the first version of the NAMA text, later paragraph 8.).

³¹ Coalition seeks more disciplines on the use of anti-dumping measures.

³² Sponsors of TN/C/W/52, a proposal for “modalities” in negotiations on geographical indications (the multilateral register for wines and spirits, and extending the higher level of protection beyond wines and spirits) and “disclosure” (patent applicants to disclose the origin of genetic resources and traditional knowledge used in the inventions). The list includes as groups: the EU, ACP and African Group.

³³ WTO, *WTO successfully concludes negotiations on China's entry*. More about mutually agreed terms and timetables for services, specified in an annex to the Protocol of Accession, can also be found on this page.

³⁴ For full access to reports and all communication regarding Trade Policy Reviews follow this path: www.wto.org > trade topics > trade policy reviews.

two documents are then discussed by the WTO's full membership in the Trade Policy Review Body. The last report prepared for the sixth Trade Policy Review of China was discussed during 2016.

According to the WTO rules, China is still considered a developing country. It is under opposed pressures – from outside to make larger contributions and from inside to protect and develop.³⁵ In the first ten years after the accession, China achieved a win-win outcome with the rest of the world. In terms of trade, China has been the largest destination for the export of LDCs since 2009. China is the only WTO member not requesting market access for LDC acceding countries and the largest trading partner for major economies. China has been a contributor to the Aid for Trade initiative since 2008 and the largest developing country in terms of outward FDI.³⁶ China's Protocol of Accession to the WTO allowed other country members to consider China as a Non-Market Economy (NME) until the end of 2016. The Chinese government has been straggling to gain Market Economy Status (MES) in order to reduce the number of antidumping investigations against Chinese products. One research article showed that 14 out of 16 countries in the sample that recognized Chinese MES reduced their antidumping investigations thereafter.³⁷ This trend will correspond with China's intentions because it does not want to be recognized as a country that enters into foreign markets through dumping measures. Sixteen years after China's entry into the World Trade Organization, the trade policy is still a major issue for China's relations with other countries. It is especially true when it comes to China-US bilateral relations. The USA President Donald Trump has called out China for its trade policies, accusing the country of conducting unfair trade with the USA. Also, other countries argue that China is the only country that has benefited from international trade.³⁸

So far, China has fulfilled its WTO commitments. Continued implementation of the WTO commitments in the coming years will further facilitate China's ongoing integration with the global economy and generate benefits for most partner countries. However, it may also pose significant challenges to the authorities in China, and the extensive safeguard provisions under the WTO agreement represent a downside risk that could constrain China's export growth in the future.³⁹ In the 13th Five-Year Plan (2016-2020) China focused

³⁵ Permanent Mission of China to the WTO (2001)

³⁶ Permanent Mission of China to the WTO (2001)

³⁷ For more details look at the research: Urdinez Francisco, Masiero Gilmar (2015): "China and the WTO: Will the Market Economy Status Make Any Difference after 2016? ", *The Chinese Economy*, 48: 169

³⁸ See Zhang Yu, Zou Yun, "China Footprint: Who benefits from China's trade policy?", https://news.cgtn.com/news/3451444d34557a6333566d54/share_p.html (21.11.2017.)

³⁹ Rumbaugh Thomas, Blancher Nicolas (2004): "China: International Trade and WTO Accession", IMF Working Paper, No. 4-36, International Monetary Fund. 3

on continuing the process of structural economic reform, which includes the promotion of private sector participation in the economy, as well as the reform of state-owned enterprises. The Plan contains the promotion of competition, fiscal reform, financial sector reform to increase private capital participation in banking and expand the provision of financial services, and making the exchange rate and interest rate more market-oriented. How much of the planned will be achieved remains to be seen.

4. Trade changes China experienced after the WTO accession

China's experience as a WTO member is unique. Presumably, the WTO accession has not demonstrated such a profound impact on the economic, legal and political changes in any other country as it had in China.⁴⁰ For our research, we are focusing on the most important changes in the foreign trade. In 2000 China was the 7th leading exporter and the 8th largest importer of merchandise trade - exports 249.2 billion dollars (3.9% share), imports 225.1 billion dollars (3.4% share). For commercial services, China was the 12th leading exporter and the 10th largest importer - exports 29.7 billion dollars (2.1% share), imports 34.8 billion dollars (2.5% share).⁴¹ China's contribution to the international economy has grown since it has joined the WTO.

With the entry into the WTO China has been given the necessary impetus for accelerating the growth and development of its economy. In the first 6 years after joining the WTO, imports increased by over 30% each year, which is a 100-billion-dollar increase annually. Trade volume from 2001 to 2016 has jumped from 510 billion US dollars to 3686 billion US dollars. That is a more than seven-fold increase from 2001 to 2016 (see Table 2). These are unprecedented results of an economy on a world scale. China has also become the biggest export country moving up from the sixth-place ranking in 2001. China cut its import tariffs from an average of 15.3% in 2001 to 9.8% in 2010, in accordance with the WTO rules. For some products, tariffs have been dramatically dropping. For example, the car tariff used to be as high as 100% and now it is reduced to 25%. Average wine tariffs fell from 120% to 14%. China's commitment to promoting free and fair multilateral trade has never wavered since 2001.⁴² These results would be sufficient to conclude that China has made huge benefits from the WTO membership. An interesting research paper about a link between the reduction in trade policy uncertainty and companies' innovation incentives implies that trade

⁴⁰ More about economic, legal, and political change in: Halverson Karen (2004): "China's WTO accession: economic, legal, and political implications." *BC Int'l & Comp. L. Rev.* 27, 319

⁴¹ WTO, *WTO successfully concludes negotiations on China's entry*

⁴² Zhang Yu, Zou Yun, *China Footprint*

liberalization may promote economic growth by removing policy uncertainties and consequently encouraging innovation.⁴³ China is a successful example of this.

Table 2. China's Foreign Trade 2001-2016, in billion US dollars

Year	Export	Import	Balance
2001	266.10	243.55	22.55
2002	325.60	295.17	30.43
2003	438.23	412.76	25.47
2004	593.33	561.23	32.10
2005	761.95	659.95	102.00
2006	968.94	791.46	177.48
2007	1220.06	956.12	263.94
2008	1430.70	1132.56	298.14
2009	1201.65	1005.56	196.09
2010	1577.76	1396.00	181.76
2011	1898.39	1743.39	155.00
2012	2048.78	1818.20	230.58
2013	2209.01	1949.99	259.02
2014	2342.29	1959.23	383.06
2015	2273.47	1679.56	593.91
2016	2097.64	1587.92	509.72

Source: Compiled by the author using data from the Trade Map – International Trade Statistics, <http://www.trademap.org/>

In China, many expressed worries that its trade would face strong competition from developed countries, and that especially agricultural and infant industries would be vulnerable to the new conditions under the WTO. Others were hoping that accession would promote the rule of law in China and reduce the interference of the state. Also, there were hopes that China would accelerate trade and become the leading player in the world economy.⁴⁴ In one of the most interesting researches, the results show that “the major efficiency gains from WTO accession would accrue to China itself, but rest of the world, especially developed countries and Asian newly industrialized economies, as well

⁴³ Qing Liu, Hong Ma (2016): “Trade Policy Uncertainty and Innovation: Firm Level Evidence from China's WTO Accession”, <http://economics.ucdavis.edu/events/papers/1026Ma.pdf>, (8. June 2017.)

⁴⁴ Hasan Md Mehedi (2016): “China's WTO Accession: Impacts on Trade policy and Legal system”, *Quarterly Journal of Chinese Studies*, Xiamen 4(3), 54

as the least developed countries, also benefit. However, integrating China into the global trading system could induce more competition on labor-intensive products and reduce their prices. The expansion of labor-intensive sectors in China could increase its net imports on agricultural and capital-intensive products, drive up their price, thus improving industrial and land abundant countries' terms of trade. China also increases its land-intensive agricultural imports dramatically, and its share in total world imports more than doubled. However, its impact on food import least developed countries is very limited because of the expansion of agricultural production worldwide and the improvement of international terms of trade for those countries".⁴⁵ In any case, the impact of China on the world market and overall on the world economy is extremely large.

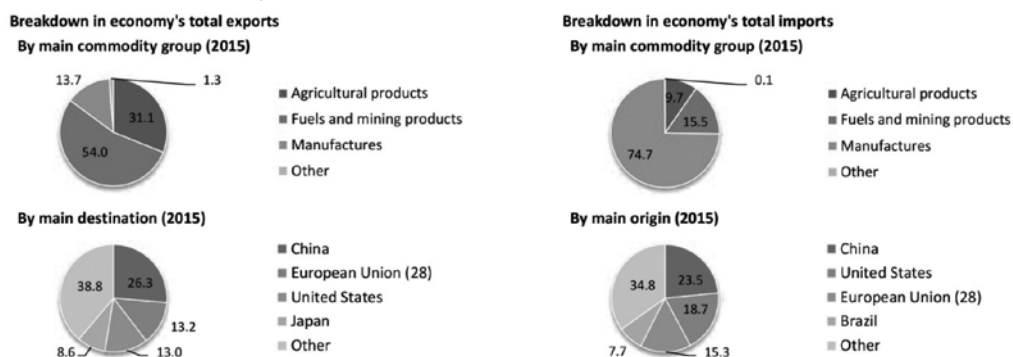
There has been much debate regarding the impact of China's economic rise on the world economy. The world economy has doubled in size since 1990. It is its biggest expansion in history, despite the post-2007 Great Recession. China, India and other emerging giants – representing one-third of humanity – are rapidly catching up with the developed world.⁴⁶ China's integration with the global economy has contributed to sustained growth in international trade. Both its exports and imports have grown faster than the world trade for more than twenty years. As China's trade with the rest of the world has deepened, its composition and geographical pattern have also shifted. Its overall share of exports to industrial economies has increased and become more diversified. China has also become increasingly important within the Asian regional economy. With vertical specialization of production within Asia, China is now among the most important export destinations for other Asian countries.⁴⁷

Today it is hard to find a place in the world that does not have "made in China (PRC)" products. China emerged as the new "workshop of the world." It could not have done that without the integration into global production networks. According to the WTO Trade Profiles data, China's GDP was 10.87 trillion US dollars in 2015 and GDP per capita was 7503 US dollars (2013-2015). China is the first world trade merchandise exporter and the second largest merchandise importer in the world. As regards Commercial services, China is the third largest exporter in the world and the second largest importer. Trade per capita was 1677 US dollars (2013-2015), accounting for 22.3 % of GDP (2013-2015). The breakdown in China economy's total merchandise exports and imports can be seen in Graph 1.

⁴⁵ Wang, Z. (2001): "The Impact of China's WTO Accession on the World Economy", GTAP Resource No.670 and Conference Paper, 18-9

⁴⁶ WTO, World Trade Report 2017 Trade Technology and Jobs

⁴⁷ Rumbaugh Thomas, Blancher Nicolas (2004): "China: International Trade and WTO Accession", IMF Working Paper, No. 4-36, International Monetary Fund. 3

Graph 1. Structure of China's Merchandise Trade (2015) in %

Source: WTO, Trade Profiles 2016, p. 78.

As recently as the 1980s, China's economy was still overwhelmingly comprised of poor agrarian workers. Today, agriculture accounts for just 28% of Chinese employment structure, while manufacturing accounts for 29% and services – its fastest growing sector – account for 43%.⁴⁸

China's current account surplus totaled 330.6 billion US dollars in 2015 and was equivalent to 3% of GDP. China's traditional external current account surplus reflects the excess of national savings over investment, which, after narrowing up to 2014, widened again in 2015 to 3.4% of GDP.⁴⁹ This high surplus mostly comes from a large increase in the merchandise trade surplus. The merchandise trade surplus increased sharply in 2014 and 2015 when it reached 567 billion US\$ or the equivalent of 5.2% of GDP. This mainly reflected the decline in imports. Imports as a share of GDP declined to 14.5% in 2015, down from 17.5% in 2014 and 21.1% in 2011. In 2015, both exports and imports of goods declined, with exports totaling 2.28 trillion US dollars, down from 2.34 trillion US dollars in 2014, and imports amounting to 1.68 trillion US dollars, down from 1.96 trillion US dollars in 2014. Import contraction in value terms reflects, first of all, lower oil and other commodity prices. Manufactured products remained the dominant component of exports, accounting for slightly over 94% of the total exports. Among manufactured products, office machines, telecommunication equipment, textiles and clothing continued to be China's main exports. The main destinations for Chinese merchandise exports are the United States, the EU, Hong Kong, Japan, the Republic of Korea, and ASEAN countries, which combined represent about 70% of exports. The main import countries are the EU, the Republic of Korea, the United States, Chinese Taipei, Japan, Australia and ASEAN countries.

⁴⁸ WTO, World Trade Report 2017 Trade Technology and Jobs, 15

⁴⁹ WTO, www.wto.org.

The latest data show the weakness of trade in 2015 was due to a number of factors, including an economic slowdown in China. Also, the appreciation of the yuan may have contributed to the economic slowdown in China to the extent that it made Chinese exports more expensive in foreign markets. Meanwhile, even though output slowed in China, indicators of business and consumer sentiment suggested that growth would remain stable at a lower but more sustainable rate.⁵⁰

In recent years China has also been a very active player in the global economy, a country that is leading in economic policy and brings new trends in the world market. It became the one that makes important decisions affecting a large number of countries. Since that suits its goals, China now firmly supports globalization and is against trade protectionism. On the other hand, China has been an important member of the BRICS emerging economies mechanism. Also, the “One Belt, One Road” Initiative is the latest in China’s global integration efforts. More than 60 countries have signed up to be part of the development strategy in the three continents: Asia, Africa and Europe. Opening new trade routes should help China with overcapacity in sectors like manufacturing. The slowing down of China’s economy could simultaneously give a boost to it. If this effort becomes a success story, China will consolidate its position as a global power.

5. Conclusion

China was one of the 23 original signatories of the GATT. After withdrawal, China wanted to resume its position and applied to the GATT but never completed the accession. China applied and finally become a WTO member in 2001, after 15 years of negotiation. Trade reforms and accepted commitments as part of China’s accession to the WTO have been crucial in promoting its integration with the global trading system. The integration into the global production networks made Chinese products accessible worldwide. During the accession negotiations, as well as during its membership in the WTO, China has undergone major structural changes in its economy. The largest of them is accelerated growth of the non-state economy, substantial tariff reductions and the elimination of most nontariff barriers.

China’s integration with the global economy has contributed to sustained growth in international trade. Both its exports and imports have grown faster than world trade for more than twenty years. China is now the first world trade merchandise exporter and the second largest merchandise importer in the world. Besides, China becomes a very active player in the World Trade Organization. China actively supports the Doha Development Agenda and participates in the negotiations rounds, especially in the goods negotiations, agriculture and non-agricultural market access negotiations and in the services and rules negotiations.

⁵⁰ WTO, World Trade Statistical Review 2016

However, despite some expectations, China has not taken a leading role in the Doha negotiations and in the WTO as a whole.

There is a firm belief that in the future China will continue its breakthrough and integration into the world trade relying on an already accomplished strong role in the world economy.

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PRISTUPANJE KINE SVETSKOJ TRGOVINSKOJ ORGANIZACIJI: PROCES I EFEKTI

Cilj rada je da predstavi i pokuša da objasni promene koje su nastale u trgovini i privredi Kine tokom pristupanja i tokom članstva u Svetskoj trgovinskoj organizaciji. Rad čine četiri celine i zaključak. Na početku su ukratko predstavljani pregovori Kine sa GATT, kao i glavne prepreke zbog kojih ovi pregovori nisu dovedeni do kraja. Drugi deo je posvećen pregovorima za članstvo u STO i najvažnijim promenama kroz koje je privreda Kine prošla da bi ispunila uslove za članstvo. Ovde su pomenute najvažnije prepreke članstvu kao i privredne reforme i porast privatnog sektora u Kini. Treći deo je posvećen tome kako se Kina po pristupanju u STO uključila odmah i u Doha razvojnu rundu pregovora. Ova zemlja je postala i članica više pregovaračkih grupa u okviru STO, a u međuvremenu potpisala i pojedine STO sporazume. Takođe, Kina je i više puta prošla kroz reviziju svoje trgovinske politike, što je periodična obaveza svake članice STO. U poslednjem delu su opisane najvažnije promene u trgovini Kine koje su nastupile po punopravnom članstvu u STO koristeći sve prednosti ovoga članstva. Kina je tokom šesnaest godina svoga članstva u STO postigla nikada do tada viđenu brzinu trgovinskog rasta, što ju je dovelo po vodećih pozicija u svetskoj trgovini. Na kraju zaključujemo da se Kina u potpunosti integrisala u svetku privredu i da je pristupanje Svetskoj trgovinskoj organizaciji imalo veliku ulogu u tome.

Ključne reči: Kina, STO, GATT, pristupanje, ekonomija, trgovina, Doha razvojna agenda, pregovori.

MACAU'S BRIDGING ROLE BETWEEN CHINA AND LATIN AMERICA

Since the beginning of the 21st century, sustained and rapid growth in relations between China and the Latin American and Caribbean countries has been witnessed. It is widely believed that a stronger tie with a promising future can be envisaged.

Historically, Macau has been a Portuguese trading post in the Far East for over 442 years. After the Handover in 1999, Macau was officially returned to China as a Special Administrative Region. At present, Macau is the "world's top gaming capital" and a part of the Greater Bay Area of national strategic importance in southern China. By capitalizing on her core strengths and special privileges, Macau can go much further, not only as a gaming and tourism city but also an effective and efficient platform between China and Latin America.

Furthermore, with the new mega structure, the vast logistic network and the endorsed Greater Bay Area initiative, Macau can serve as an effective soft-power hub of the nation for helping build an extension of the "Belt and Road" to Latin America in the Pacific Rim.

Keywords: Macau, Special Administrative Region of China, Greater Bay Area, Belt and Road, China-Latin America Relations

1. Introduction

From the historical point of view, we can presume that contacts between Latin America and Asia have always existed, although mostly commercial ones, having in mind that Spanish and Portuguese empires kept expanding their colonial power and administration in the Philippines and the Pacific Rim. It is a well-known historical fact that famous Spanish navigators discovered and established the map of new commercial shipping routes between America and Far East, after year 1520 when the Strait of Magellan was discovered and the Spaniards came to the Philippines. But in general, we could underline that Spanish political and economic priority was centered in the so-called "New

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World” and therefore they maintained eminently commercial activities in this part of the world.

Concerning China – Latin America Relations, it is necessary to underline that their origin could be traced back to the Ming Dynasty (1368 – 1644). It all started with the Maritime Silk Road. Along with the routes, silk, porcelain, cotton yarn and other valuable commodities were shipped mostly to Mexico and Peru in the middle of the Ming Dynasty. Nevertheless, due to geographic distance and cultural differences, the earliest official ties between China and the Latin American countries could have been established only between 1870s and 1900s with Peru, Brazil, Mexico, Cuba and Panama.

For example, with the rise of the plantations in the mid-nineteenth century and the lack of labor force, the public sector of independent Latin American countries initiated the so-called “traffic of Coolies”. “Coolies” were Chinese workers who came to Cuba, the rest of the Caribbean region, Peru and later on to Chile under the eight years labor contracts.¹

However, the general overview of Asian – Latin American relations could be understood as the result of negative and highly vulnerable international position of Latin American countries after the independence. Nevertheless, a few examples indicate in some cases the existence of long tradition and interests in establishing formal relations with the governments of China and Japan. In the Mexican case, it is important to stress that the first contacts with China were established during the Ming Dynasty, but both countries signed the Treaty of Friendship, Commerce and Navigation in 1888, representing the first official document for the establishment of diplomatic relations between the two countries. Concerning Chile, the historical background shows that not only trade connections were established with China and Japan, but also with India. It is well known that commercial boats from Chilean port of Valparaíso sailed to Calcutta, Hong Kong, Canton and Manila, loaded with copper and other nitrates. Following this development intensive trade exchange lasted until the mid-nineteenth century. Formally, China and Chile didn’t establish diplomatic relations because China refused to receive consuls from those countries that had not signed Agreement on Friendship and Trade. Finally, formal diplomatic relations between China and Chile were established in 1906.

In contrast to many western countries, China has been trying to build up a strong and lasting friendship with the Latin American countries without bundling it with politics. In 2014, the Forum of China and Community of Latin American and Caribbean States, abbreviated as Foro China-CELAC in Spanish and China-CELAC Forum in English, was officially established. “The China-CELAC Forum aims to promote the development of the Comprehensive Cooperative Partnership between China and Latin America and the Caribbean, characterized by equality, mutual benefit and shared development. China-CELAC Forum includes China

¹ Carredano Juan B. Amores, *Historia de América*, Ariel, Barcelona, Spain, 2006, pp. 627-648.

and the 33 member states of CELAC: Antigua and Barbuda, Argentina, Bahamas, Barbados, Belize, Bolivia, Brazil, Chile, Colombia, Costa Rica, Cuba, Dominican Republic, Dominica, Ecuador, El Salvador, Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, Mexico, Nicaragua, Panama, Paraguay, Peru, Saint Kitts and Nevis, Santa Lucia, Saint Vincent and the Grenadines, Suriname, Trinidad and Tobago, Uruguay, and Venezuela”.²

As of 2017, out of 33 Latin American countries, 22³ have already established diplomatic ties with China. Trade between China and Latin America and the Caribbean has leaped from US\$12 billion in 2000 to around US\$266 billion⁴ in 2017. With closer economic cooperation and ties, China has already become the top trading partner of Brazil, Chile and Peru. Since the beginning of the 21st century, sustained and rapid growth in relations between China and the Latin American and Caribbean countries has been witnessed. It is widely believed that a stronger tie coupled with a more promising future can be envisaged.

2. Macau's Bridging Role between China, the Latin American and Caribbean Countries

Macau, a special administrative region of China gifted with a unique historical background and a well-blended culture of the east and west, is fundamentally different from the other cities in the mainland. Among all the differences, the historical link of Macau with the Latin world is well considered as her unique and strategically essential quality for connecting China with Latin America. In addition, her present status of a Special Administrative Region in China is definitely an important add-on that can help enforce her bridging role between China and the Latin world in the era of globalization.

2.1. Macau's Historical Background

Macau (also spelled Macao), a small city located on the estuary of the Pearl River Delta in the southern part of China, has long been recognized as the gateway of China to the Latin world. “It is not an exaggeration to claim that Macao is a creation of globalization and migration. If the dawn of globalization can be traced to the accelerated flow of goods and people around the globe, spearheaded by the Portuguese explorers looking for spices and wealth, these explorers set

² Department of Latin American and Caribbean Affairs Ministry of Foreign Affairs of China, April, 2016, “Basic Information about China-CELAC Forum”

³ Source: Ministry of Foreign Affairs of People's Republic of China

⁴ ECLAC, Press Release, 22 January 2018, “ECLAC Highlights Importance and Opportunity in Strengthening Ties between China and Latin America and the Caribbean”

up Macao as one of the first outposts in the Far East to service this trade.”⁵ In 1557, Macau became the first European trading post in Asia when the Portuguese successfully obtained permission from the Ming Government for establishing a permanent settlement and trade base in Macau.

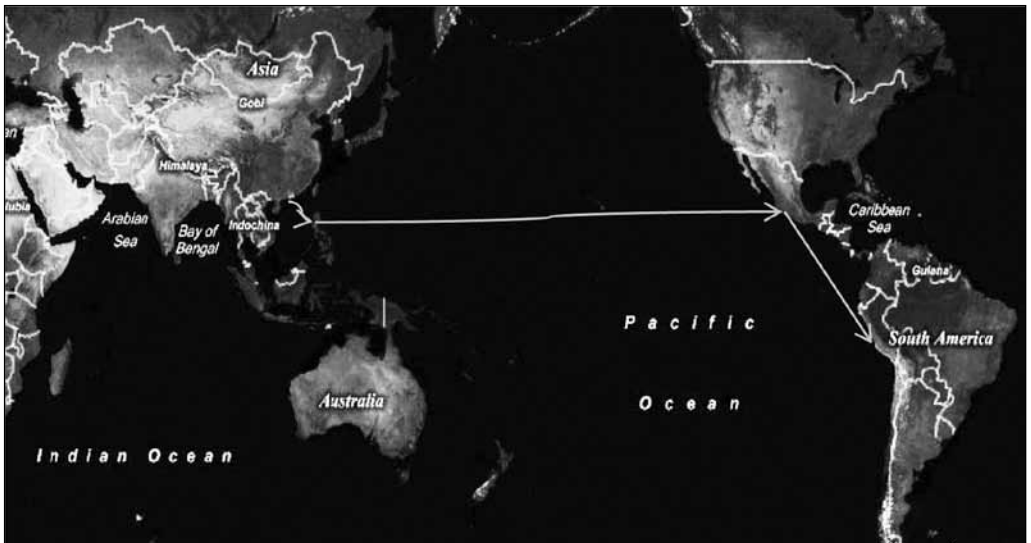
2.2. Macau - Connection with the Latin World since the Age of Discovery

Macau's long-established connection with the Latin world started during the Age of Discovery (15th to 17th Century). At that time Macau was functioning as an important hub for Portugal's trade along three major routes:

- (1) Macau-Malacca-Goa-Lisbon;
- (2) Guangzhou-Macau-Nagasaki;
- (3) Macau-Manila-Mexico.



The Maritime Silk Route, based in Macau, expanded to reach Europe via Goa, Japan via Nagasaki, Spanish America via Manila, and Southeast Asia via Malacca. This was the first step of Globalization.



⁵ Alex H. Choi (2006) "Migrant Workers in Macao; Labour and Globalization", Transnational Migration and Work in Asia edited by Kevin Hewison, Ken Young, Part II, 9, 144-164

The Macau-Manila-Mexico route brought to Macau and China, among all other products, “Tales of Silver from Mexico and Peru.”⁶ It was during this period that Macau first started its bridging role in connecting China with Latin America, from Mexico to Peru and gradually to the other parts of the continent.

Starting from 1557, Macau has been under the administration of the Portuguese government for 442 years until December 1999, when this last Portuguese overseas enclave was officially returned to China and renamed as “Macao Special Administrative Region of the People’s Republic of China”. As agreed in the “Joint declaration of the Government of the People’s Republic of China and The Government of the Republic of Portugal on the question of Macao” signed by the two governments on the 13th April 1987, “the current social and economic systems in Macao will remain unchanged, so will the life-style. The laws currently in force in Macao will remain basically unchanged. Due regard will be given to the economic interests of Portugal and other countries in Macao. All these basic policies and principles would be provided for in the Basic Law of the Macao Special Administrative Region of the People’s Republic of China and will remain unchanged for 50 years.”⁷ The Joint Declaration expressed fully the principals of “One Country, Two Systems”, „Administration of Macao by the Macao People” and „a High Degree of Autonomy” in Macao. This innovative concept of “One Country, Two Systems” provided a pragmatic and flexible approach for Macau to start a new era, a better and more promising future!

2.3. Macau’s Cultural Characteristics

After a substantial period of mixed influences, Macau has adapted itself into a city of high tolerance with a well-blended culture of the East and West. People of various races with different religious beliefs and cultures have co-existed in this small oriental city in harmony without major conflicts.

There is no doubt that after the last governor, the Basque General Rocha Vieira returned the enclave on 20th December 1999 to China, and almost five centuries after its founding, Macau remains a unique ethnical and cultural piece in the global context, especially for tolerance and coexistence of civilizations. In the four and a half centuries of domination, Macau never held the category of colony, but “Chinese territory under Portuguese administration” with an identity that remains intact: Never was China, nor Portugal, but simply Macau.

Macau’s cultural diversity can be well presented in five areas: Religion, Architecture, Miscegenation, Language and Cuisine:

⁶ Candice Goucher, Linda Walton (2008): “WORLD HISTORY, JOURNEYS: Journeys from Past to Present”, 154

⁷ Ministry of Foreign Affairs of the People’s Republic of China, Diplomatic History, Events & Issues: “Resumption by China of the Exercise of Sovereignty over Macao”. http://www.fmprc.gov.cn/mfa_eng/ziliao_665539/3602_665543/3604_665547/t18052.shtml

2.3.1. Religion

It is on this tiny piece of land that “Bible” was first translated into Chinese. Also, it was the city where the first western style university (St. Paul’s College) in the Far East was established by the Jesuits in 1594⁸. Catholicism is the most influential religion in Macau. The Catholic Church in Macau has long been serving as a bridge between Chinese and Western cultures as well as for linking up the mainland Church with the Lusophone Churches in Africa, Asia and Latin America. Nonetheless, a high degree of Religious Freedom could have been maintained successfully in the community without much difficulty. Catholicism, Christianity, Buddhism, Taoism, Confucianism, Muslim, Hindu, Bahai, etc. have been co-existing in this city in harmony for over centuries.

2.3.2. Architecture

Another cultural characteristic of Macau can well be seen around the city, i.e. the different architectural styles like Western, Chinese and Fusion. Indeed, “The Historic Centre of Macao”, which was officially listed as a World Heritage Site by UNESCO including about twenty-five historic locations, is the living testimony to the integration and co-existence of eastern and western cultures over centuries.

2.3.3. Miscegenation – Macanese Identity

The term miscegenation has been used since the 19th century to refer to interracial marriage and has entered historical records during European colonialism and the Age of Discovery. Macanese - the early Macanese ethnic group was formed from intermarriages between Portuguese men and Malay, Japanese or Indian women. The Portuguese also encouraged Chinese migration to Macau and most Macanese in Macau were then formed from intermarriages between Portuguese and Chinese. “After the handover of Macau to China in 1999 many Macanese migrated to other countries. There are between 25,000–46,000 Macanese, but only 5,000–8,000 are living in Macau, while most are living in Latin America, America and Portugal.”⁹

2.3.4. Language

Having been influenced substantially by Portugal for almost four and a half centuries, Macau can be considered as the most open city in China for accepting the use of Latin languages in the community when compared with other places in the Mainland. It is no surprise that Macau is the only place in China where three languages (Chinese, Portuguese and English) and four dialects (Cantonese, Mandarin, Portuguese and English) are in use and are incorporated into the

⁸ Cathryn H. Clayton (2009): “Sovereignty at the Edge: Macau & the Question of Chineseness”, 146-147, Harvard University Asia Center

⁹ Dr. Robert H. Schram (2013): Mixed Marriage...Interreligious, Interracial, Interethnic. 129

elementary and secondary education system. While Chinese and Portuguese are the two official languages, English is another widely spoken language in the city mainly for business and tourism. In general, students are exposed to 2 to 3 languages at an early age.

2.3.5. Cuisine and Tourism

Long before the term fusion was invented it had already been cooked up in this former Portuguese outpost. The characteristic flavors of China and Portugal are combined in the native Macanese cuisine. Nevertheless, the Macanese cuisine involves other foreign influences as well. The Portuguese mariners, who arrived in Macau from their travels, brought along with them the tastes of Europe, Latin America, Africa, India and Southeast Asia, creating a unique and delicious fusion cuisine that eventually became a famous attraction of Macau. In 2017, Macau was awarded the designation of “Macao, China” as a new member city of UNESCO Creative Cities Network (UCCN) in the field of Gastronomy by the UNESCO. “This title reflects the global recognition of Macau’s 400-plus-year old culinary legacy and the increasing interest among the young generation in gastronomy culture and especially Macanese cuisine. It will also provide favorable conditions for food traditions to continuously thrive”.¹⁰

Macau has a relatively long history of tourism industry development. Without doubt, Macau’s tourism industry has been closely linked with gaming which was legalized by the Portuguese Macau government since 1850s. “In February 1961, the 119th Governor of Macao Jaime Silvério Marques designated Macao as a “permanent gaming region” and officially positioned Macao as a low taxation region and regarded gaming and tourism as its major economic activities.”¹¹ In the following year, when the Sociedade de Turismo e Diversões de Macau (STDM) won the bidding and got the monopoly concession, Macau tourism industry entered a new era of expansion. Nevertheless, the gaming monopoly eventually came to an end in 2002 for the aim of injecting new dynamics to the industry. Following the liberation from the gaming monopoly and the relaxation of “Hong Kong and Macao Tour” regulations by the Central Government in the same year, the tourism industry started to take an even bigger leap. In the past two decades, tourist resources and establishments developed rapidly, making Macau the World’s No. 1 Gaming Capital and an international tourism city. Visitors soared from 11,530,841 in 2002 to 32,610,506 in 2017.¹² By place of

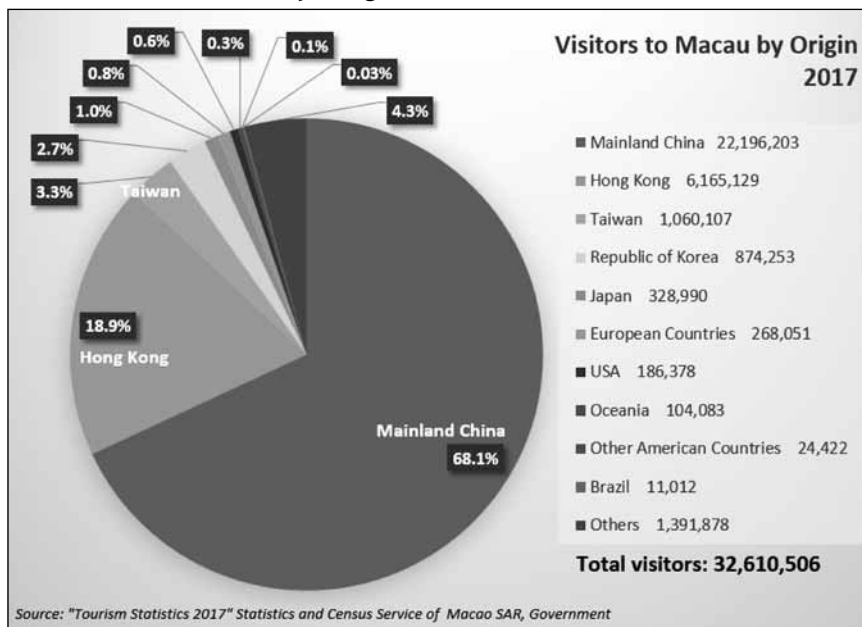
¹⁰ Macau Daily Times, November 2, 2017, “MACAU DESIGNATED ‘CREATIVE CITY OF GASTRONOMY’ BY UNESCO” <https://macaudailytimes.com.mo/macau-designated-creative-city-gastronomy-unesco.html>

¹¹ The Gaming Inspection and Coordination Bureau of Macau SAR government, “Macao Gaming History”, <http://www.dicj.gov.mo/web/en/history/index.html>

¹² Statistics and Census Service of Macau SAR government, <http://www.dsec.gov.mo/home.aspx?lang=en-US>

origin, visitors from mainland China accounted for almost 22.2 million, while those from Hong Kong around 6.16 million and Taiwan 1.06 million (Figure 1).

Figure 1. *Visitors to Macau by Origin in 2017*



The visitor-source markets however need to be more diversified and tourists from the Americas, Europe and other places should be encouraged to come and explore this special oriental city. To avoid over-dependence on a single industry sector – gaming, Macau has been striving to develop cultural tourism manifesting the city's cultural heritage such as the World's Heritage Sites and her unique culinary legacy. Indeed, more and more visitors are attracted to Macau, not only by gaming but also by the Macanese cuisine and the exquisite dining ambiance.

Owing to all these historical and cultural characteristics, Macau is close to the Latin world, not by physical distance but by the feeling of familiarity and perceived similarity! In essence, these special features, in toto, make it comparatively easier for Macau to get connected with the Latin countries. In practice, Macau has a great capacity for linking up China with Latin America, specifically in the realms of business and cultural exchange, not only in the past but also at the present and in the future!

3. Macau - Special Administrative Region of the People's Republic of China (PRC)

Macau has been administered by Portugal from the mid-16th century until late 1999, when it was the last remaining European enclave in Asia. Sovereignty over Macau was transferred back to China on 20 December 1999. The Sino-Portuguese Joint Declaration and the Basic Law of Macau stipulate that Macau operates with a high degree of autonomy until at least 2049, fifty years after the transfer.¹³ Since then, Macau has become one of the two Special Administrative Regions of China, similar to its neighbor Hong Kong.

Macau or the Macau Special Administrative Region (MSAR) is a highly autonomous city located on the western side of the Pearl River Delta, one of the most important economic regions in the Southern China, bordering Guangdong Province and is about 60km from Hong Kong. Similar to many small cities, Macau is rarely the center of attention in the global issues and therefore sounds unfamiliar to most of the people in the world.

Macau consists of the Macau peninsula, the Taipa Island and the Coloane Island. Due to city development, the two islands are currently linked by the COTAI Reclamation Area. Through land reclamation, the total land area of Macau has gradually increased from 11.6 square kilometers in 1912 to 30.5 square kilometers as of today. As per the results of the 2016 Census, the population of Macau is about 650,834.¹⁴ Among the population, 88.4% were Chinese, 1.4% Portuguese, and 4.6% percent Filipino.¹⁵

According to the World Bank, Macau is one of the world's richest cities, with the highest GDP per capita by purchasing power parity as of 2015.¹⁶ Macau's



¹³ University of Macau, "Basic Law of the Macao Special Administrative Region of the PRC", 26 May, 1998.

¹⁴ Statistics and Census Service of Macau SAR government, "INTERCENSOS 2016 RESULTADOS GLOBAIS", 2016.

¹⁵ Statistics and Census Service of Macau SAR government, "INTERCENSOS 2016 RESULTADOS GLOBAIS", 2016.

¹⁶ World Development Indicators database, Retrieved 15 September 2014, "GDP per capita, PPP (current international \$)"

gross domestic product (GDP) was 325.2 billion Patacas. This translates into 574,798 Patacas or US\$71,894 of GDP per capita – one of the highest in Asia.¹⁷

The gaming and the tourism industries are the major driving forces of Macau's economy. The largest source of direct tax for the local government is from Gaming Industry. Macau became the world's largest gambling center in 2006.¹⁸ According to statistics provided by the Gaming Inspection and Coordination Bureau (DICJ), the gaming industry's total gross revenue in 2013 amounted to 360 billion Patacas (US\$46.25 billion), ranking No. 1 in the world. In 2017, though the gross revenue of gaming has dropped, it still remained at a high level of about 265.7 billion Patacas (US\$33.13 billion).¹⁹

Besides gaming, tourism is another important economic sector of Macau. In 2017, the total number of visitors to Macao hit 32,610,506.²⁰ In accordance with the government strategy, Macau is striving to develop into a Tourism and Gaming, MICE & Leisure Destination. Apart from gaming, cultural tourism is another element that Macau want people to get attracted to. Macau is not only a casino city, as described by some sources, but also a city rich in history and cultural specialties. "In 2005, The Historic Centre of Macao was inscribed on the UNESCO World Heritage List as a result of its unique historical and cultural landscape".²¹ In November 2017, Macau was also officially designated a member of the UNESCO Creative Cities Network in the field of Gastronomy.²²

Apart from its historical and cultural characteristics, what are the other elements that made Macau different from other mainland cities and comparatively well-prepared for the China-Latin American connection? Without doubt, the status of Special Administrative Region and the Support of the Central Government are the keys to success!

As a special administrative region, Macau enjoys a good number of special and exclusive privileges that help differentiate itself from other cities in mainland China. With special arrangement, Macau is in a more favorable position to perform the bridging role between China and the Latin World. Among many, the main privileges are: High Degree of Autonomy, Open Economy, Free Port, Low Tax Rate and Different Legal System.

¹⁷ World Development Indicators database, Retrieved 15 September 2014, "GDP per capita, PPP (current international \$)"

¹⁸ Barboza, David (2007-01-23). "Macao Surpasses Las Vegas as Gambling Center". The New York Times.

¹⁹ The Gaming Inspection and Coordination Bureau of Macau SAR government, "Monthly Gross Revenue from Games of Fortune in 2017 and 2016"

²⁰ Statistics and Census Service of Macau SAR government, <http://www.dsec.gov.mo/home.aspx?lang=en-US>

²¹ <http://en.macaotourism.gov.mo/plan/aboutmacao.php>

²² <https://en.unesco.org/news/64-cities-join-unesco-creative-cities-network>

3.1. Business Platform for Exploring Opportunities in Mainland China

High Degree of Autonomy - Under the policy of “One Country, Two Systems”, the PRC’s Central People’s Government is responsible for the territory’s defense and foreign affairs, while Macau maintains its own legal system, police force, monetary system, customs policy, and immigration policy. Macau participates in many international organizations and events that do not require members to possess national sovereignty.²³

By enjoying high degree of autonomy and freedom in different aspects, Macau is highly flexible and capable of performing its bridging role between mainland China and the rest of the world, especially in its connection with the Latin speaking countries.

According to the Basic Law, Macau may develop bilateral relations with other countries or regions and participate in international organizations and multinational treaties on its own under the name ‘Macao, China’ in the areas of commerce, trade, finance, aviation, communication, tourism, culture, technology and sport.

As per the information given by the Macau government, by the end of 2013, 89 countries established consular services in Macau or extended their consular services from Hong Kong to Macau. Portugal, Angola and the Philippines have established their Consulates General to provide full consular services directly in Macau. Fifty-three Consulates General accredited to Hong Kong are also covering Macau and some of the Latin American Consulates General also execute consular duties in Macau such as Argentina, Brazil, Chile, Columbia, Mexico, Peru and Venezuela.

At the moment, certain Latin American and Caribbean countries are still reluctant to build up official ties with mainland China due to different political or non-political reasons. In this regard, Macau is in fact holding a special and pivotal position that can help accommodate the needs and take the necessary steps forward for bringing those Latin American countries closer to China by means of city diplomacy or more frequent non-political cooperation that would bring about mutual benefits to all parties involved.

Open Economy and Free Port - For those who are striving to explore business opportunities or to establish closer economic relations with the mainland, Macau as a special administrative region can serve as a doorway or a desirable destination for the start-ups. Taking advantage of Macau’s special and privileged business environment, the Latin American and Caribbean enterprises may enjoy a good number of attractive conditions that are available solely in Macau, but not in other mainland cities.

²³ University of Macau, “Basic Law of the Macao Special Administrative Region of the PRC”, 26 May, 1998.

Macau adopts an open and free market economic system. With its openness and flexibility, Macau enjoys a unique position in the regional economy. Being one of the two international free ports in China, goods, capital and people can move freely in and out of Macau.

In May 2013, the World Trade Organization (WTO) released a trade policy review of Macao reaffirming the openness of Macau's economy, with its zero-tariff policy and minimum trade and investment restrictions. The report affirmed Macau's improvements in trade policies and business environment, including enhancement of the intellectual property rights system, further opening of the services industry, and facilitation of trade. According to the 2016 Index of Economic Freedom released by the US-based Heritage Foundation, Macau was ranked 7th in the Asia-Pacific region and ranked 37th among 178 economies globally and is considered a "mostly free" economy.

Low Tax Rate - Macau is having one of the lowest tax regimes in the Asia Pacific region. Assessable profit up to 200,000.00 Macau Patacas (US\$25,000.00) is tax-free and assessable profit over that amount is taxed at progressive tax-rate ranging from 9% to 12%.²⁴ The first 144,000 Macau Patacas (MOP) of an individual's taxable income is exempt from Macau Professional Tax. Progressive tax rates range from 7% to 12%. Income earned over MOP 424,000 is taxed at 12%.²⁵

Different Legal System - Under the principle of "One country, two systems", the Macau Special Administrative Region maintains the Continental European law as the foundation of its legal system. The Basic Law gives Macau independent judicial power, including the power of final adjudication. Macau's legal system strongly adheres to the rule of law and judicial independence. The courts exercise independent judicial power and are subordinated to nothing but the law.

The Basic Law, the constitutional document for Macau, adopted by the National People's Congress (NPC) in accordance with the Constitution of the People's Republic of China (PRC), safeguards the fundamental rights of the people of Macau including the freedom of speech, freedom of the press, freedom of association and assembly, freedom of procession and demonstration, the right to organize and join trade unions and to strike, freedom of religion, freedom to travel, and freedom to enter and leave Macau. Provisions applicable to Macau in the International Covenant on Civil and Political Rights, the International Covenant on Economic, Social and Cultural Rights and a number of international labor conventions also remain in force. In addition, Macau continues to comply with the main international conventions on human rights in different aspects.

²⁴ The Deloitte International Tax Source (DITS), "Macao Highlights 2014", <https://dits.deloitte.com/#TaxGuides>

²⁵ KPMG International Cooperative, 1 Mar 2017, "Macau-Thinking Beyond Borders" <https://home.kpmg.com/xx/en/home/insights/2014/04/macau-thinking-beyond-borders.html>,

Based on this special arrangement, one of the advantages of doing business in Macau is undoubtedly the comprehensive legal system that “maintains the Continental European law as the foundation of its legal system”.²⁶ This provides a different legal origin that is considered, to certain extent, more favorable to international companies. In addition, Macau can serve equally well as an international arbitration center in the region.

3.2. The Mainland and Macau Closer Economic Partnership Arrangement (CEPA)

The Mainland and Macau Closer Economic Partnership Arrangement, or Closer Economic Partnership Arrangement (CEPA) for short, is an economic agreement signed officially on October 17, 2003 between the local government of the Macau Special Administrative Region and the Central People's Government.²⁷ CEPA covers four main areas: trade in goods, trade in services, investment, economic and technical cooperation.

CEPA offers Macau's products and companies' preferential access to the mainland's market. CEPA goes beyond China's World Trade Organization (WTO) commitments, eliminating tariffs and allowing earlier or preferential access to some service sectors. Overseas companies may benefit from CEPA in the following way:

- For trade in goods, foreign investors can set up production lines in Macau to produce goods that meet the CEPA “Rules of Origin” requirements or partner with a manufacturer whose products satisfy the CEPA ‘Rules of Origin’.
- For trade in services, companies incorporated in Macau by foreign investors can make use of CEPA as long as they satisfy eligibility criteria of a “Macau Service Supplier” (for example, they must have a three to five-year operating history, depending on the sector or by partnering with or acquiring a CEPA-qualified company).

As long as the companies satisfy the criteria, they can easily gain benefits from CEPA. This favorable arrangement empowers Macau to become a more feasible and attractive platform for foreign companies which are interested in expanding their businesses into China.

²⁶ Government Information Bureau of Macau, Jun 2017, “The Legal and Judiciary System”, http://www.gcs.gov.mo/files/factsheet/Law_EN.pdf

²⁷ The Macao Economic Bureau of Macau SAR government, 17 Oct 2003, “Mainland and Macao Closer Economic Partnership Arrangement” (CEPA) http://www.economia.gov.mo/public/docs/CEPA_CEPA_I/index/en/efulltext.pdf

3.3. Economic Cooperation and Integration with Mainland Cities – PRD Economic Zones and Greater Bay Area

The Pearl River Delta economic zone (PRD)

is one of China's leading economic regions and a major manufacturing centre. It locates at the Pearl River estuary where the river enters the South China Sea. The zone is formed by 9 cities, namely Guangzhou (the provincial capital), Shenzhen, Foshan, Zhuhai, Jiangmen, Zhongshan, Dongguan, four districts and counties of Huizhou and four districts and counties of Zhaoqing.²⁸



PRD is one of the mainland's largest and most sophisticated consumer markets. Strong demand for consumer goods is driven by the growing income and influx of tourists. In 2015, PRD enjoyed a per capita GDP of RMB 107,011, 2.2 times of the national average of RMB 49,992. With 4.3% of China's total population, the region accounted for 7.5% of the nation's total retail sales of consumer goods. Retail sales of consumer goods in the region reached RMB 2,265.1 billion in 2015, that is a growth by 9.7% from 2014. Major consumer markets are in Guangzhou and Shenzhen.²⁹ This region is often considered as an emerging megacity and is one of the richest economic zones in China.

The Pan Pearl River Delta region (Pan-PRD), on the other hand, is a concept of economic co-operation of the largest scale ever since the establishment of People's Republic of China. In terms of administrative region, the *Pan Pearl River Delta region includes Fujian, Jiangxi, Hunan, Guangdong, Guangxi, Hainan, Sichuan, Guizhou, Yunnan Provinces or Autonomous Administrative Regions, and Hong Kong, Macao SARs*. Thus it can be sometimes referred as "nine plus two". The total area covered is 2 million square kilometres, 20.9% of the total national surface, with the population of 0.45 billion (34.8% of total

²⁸ Hong Kong Trade Development Council, 2 Dec 2016, "PRD Economic Profile", <http://china-trade-research.hktdc.com/business-news/article/Facts-and-Figures/PRD-Economic-Profile/ff/en/1/1X000000/1X06BW84.htm>

²⁹ Hong Kong Trade Development Council, 2 Dec 2016, "PRD Economic Profile", <http://china-trade-research.hktdc.com/business-news/article/Facts-and-Figures/PRD-Economic-Profile/ff/en/1/1X000000/1X06BW84.htm>

Chinese population), and the GDP of RMB 3,884.6 billion that is one third of the national total GDP.³⁰

Guangdong-Hong Kong-Macao Bay Area (or Greater Bay Area/Big Bay Area) - is an advanced version of the Pearl River Delta and the Pan-Pearl River Delta development initiatives. In July 2017, the National Development and Reform Commission, the Hong Kong Special Administrative Region Government, the People's Government of Guangdong Province and the Macao Special Administrative Region Government signed a "Framework Agreement on Deepening Guangdong-Hong Kong-Macao Cooperation in the Development of the Bay Area" in Hong Kong - "To fully leverage the integrated advantages of the Guangdong, Hong Kong and Macao region, deepen cooperation amongst Guangdong, Hong Kong and Macao, take forward the development of the Guangdong-Hong Kong-Macao Bay Area, participate in international cooperation at a high level, enhance the leading role in the nation's economic development and comprehensive opening up, provide new impetus to the development of Hong Kong and Macao, and maintain the long-term prosperity and stability of Hong Kong and Macao."³¹



³⁰ Macao Trade and Investment Promotion Institute, Jun 2004, "The Co-operation and Development of Pan Pearl River Delta", http://www.ipim.gov.mo/pt/publication/newsletter/213/213_1.htm

³¹ Constitutional and Mainland Affairs Bureau, Hong Kong SAR Government (2017) "Framework Agreement on Deepening Guangdong-Hong Kong-Macao Cooperation in the Development of the Bay Area" http://www.cmab.gov.hk/doc/issues/bay_area/Framework_Agreement_e.pdf

The Greater Bay Area connecting Hong Kong, Macao and nine cities in Guangdong province (Guangzhou, Shenzhen, Foshan, Dongguan, Zhuhai, Huizhou, Zhongshan, Jiangmen, and Zhaoqing) has been listed as one of the country's top three regions of strategic importance.

"The combined regional GDP of the Greater Bay Area stood at RMB 9.35 trillion (1.38 trillion U.S. dollars) in 2016 (Table 1), compared with the GDP of the Chinese mainland at RMB 74.41 trillion last year. Estimates show the regional GDP of the Greater Bay Area will reach 4.62 trillion U.S. dollars by 2030, surpassing Tokyo, New York and San Francisco bay areas to become the world No. 1."³²

Table 1. *Guangdong-Hong Kong-Macao Greater Bay Area Regional GDP and Population*

Guangdong-Hong Kong-Macao Greater Bay Area (9+2)

Year: 2016

Region/City	GDP (Billion US\$)	GDP per Capita (US\$)	Population (10,000)
Macao (SAR)	44.70	70,160	64
Hong Kong (SAR)	319.10	43,681	735
Shenzhen	282.10	25,789	1,191
Guangzhou	284.40	21,868	1,404
Zhuhai	32.20	20,511	168
Foshan	124.70	17,485	746
Zhongshan	46.40	15,023	323
Dongguan	99.00	12,453	826
Huizhou	49.40	10,802	478
Jiangmen	35.00	8,057	454
Zhaoqing	30.00	7,728	406

Source: Municipal Statistic Bureaus, World Bank national accounts data, OECD National Accounts data files, www.elivcity.com

According to the Chinese government's scheme, the creation of this mega city cluster will have impacts beyond the area, given the important development platforms, major infrastructure projects and significant economic and trade cooperation that are being or going to be involved. The Guangdong-Hong Kong-Macau Bay Area is poised to be a landmark in the country's comprehensive reform process as well as an integrated economic and business hub in southern China.

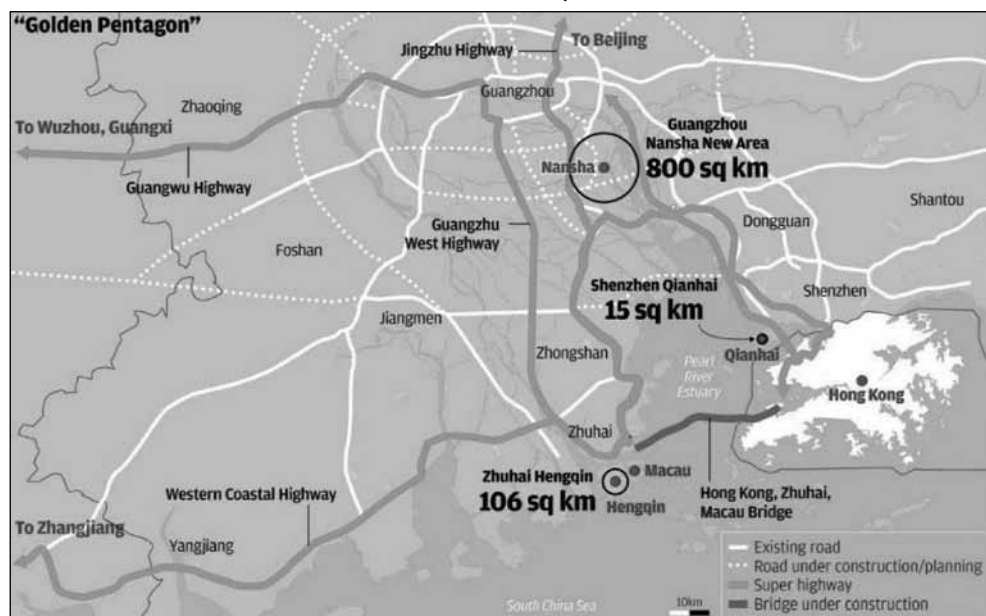
³² "China plans world-leading bay area covering Guangdong, HK, Macao", Xinhua, 11 July 2017, http://www.xinhuanet.com/english/2017-07/11/c_136435539.htm

Macau, being part of this mega region of key strategic importance, can benefit from the synergy created by the whole structure and play a more active role in bridging China and the different Latin American countries.

4. Macau's Logistic Network with the Mainland and the Outside World

Air-Land-Sea Transportation - though Macau is a small city, it is well equipped with an international airport, container harbor, 24-hour ferry terminals, bridges and roads for connecting with different mainland and overseas cities. The point of interest here is the capacity of the Macau International Airport which is still not fully utilized and is ready to handle more flights and cargo transactions not only for the city itself but also for the nearby cities. By opening new routes between Macau and Australia/New Zealand, Macau can well serve as a link between China and Latin America in the Pacific Rim for accommodating the increasing demand for air freights and cargo transactions between the two regions.

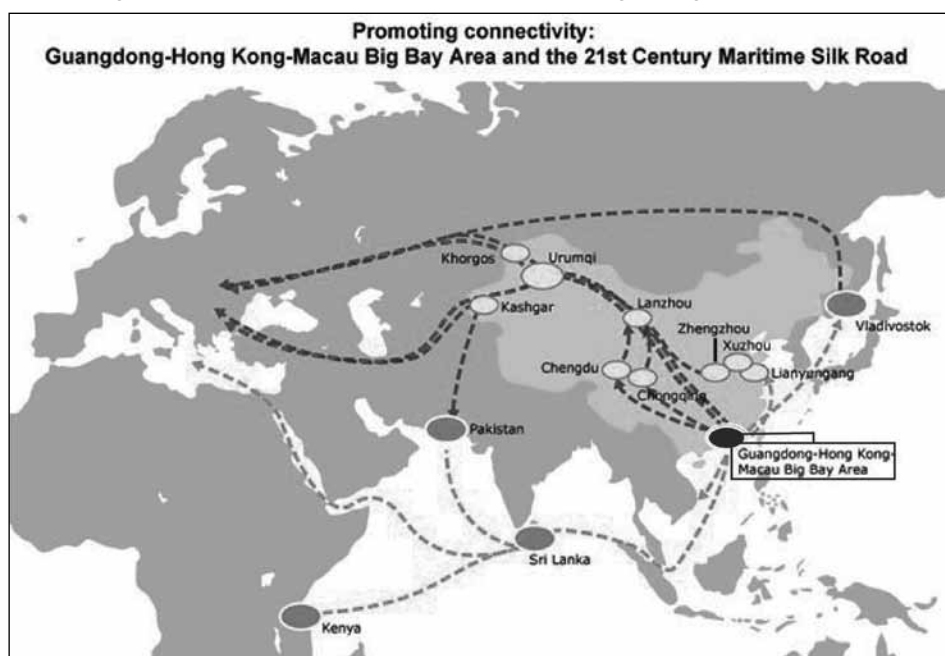
By combining with the land and sea transportation infrastructure and facilities, cargos or passengers arriving at the Macau International Airport from Australia, New Zealand or Latin America can easily be transferred to the different parts of China, especially on the Pan-Pearl River Delta and the Greater Bay Area. Outbound passengers and cargos from Macau and China, along with the same routes, can also be transferred easily to the other overseas cities.



As a portal, connected with this new mega-size bridge and a vast logistic and infrastructure network, Macau can further capitalize on its core strengths to become a strong logistic and business hub between China and Latin America via Australia or New Zealand in the Pacific rim.

5. Extension of One Belt One Road to Guangdong-Hong Kong-Macao Bay Area

With the open endorsement and blessing of President Xi Jinping, the Guangdong-Hong Kong-Macao Bay Area (Greater Bay Area) is officially linked with the One Belt One Road Initiative. The Greater Bay Area is not only considered as the most international region in China but also an area capable of becoming one of the vital portals for the Belt and Road. Embraced with about 66 million people and a combined GDP of around 12 percent of China's total GDP, the Greater Bay Area is in a relatively high position in the international value chain, especially when taking into account the two free ports of Hong Kong and Macau.



By connecting the Greater Bay Area with Latin America via the air routes in the Pacific rim, preferably between the airports of Australia/New Zealand and Macau, it is very likely to give rise to an extended version of the Belt and Road Initiative. This extension will involve more cities to the Belt and Road, not just by land and sea links but also by air. In a world that values win-win cooperation

on a par with the traditional Chinese cultural values of “peace and cooperation”, this extension will definitely help bring mutual benefits to the parties involved on the basis of peaceful coexistence.

6. Strengthening Links with Latin America through Macau NGOs

It is widely recognized that socio-cultural and economic exchanges are the initial steps for establishing or strengthening links between two places without carrying on board heavy political burdens. By enjoying the freedoms granted by the Central Government, socio-cultural and economic exchanges between China and the Latin American and Caribbean countries can be carried out in Macau with much flexibility and high efficiency.

In fact, interactions between Macau and a number of Latin American and Caribbean (LAC) countries have increased significantly in the past decade. With the support of the local government, NGO like MAPEAL (Macao Association for the Promotion of Exchange between Asia-Pacific and Latin America) has been striving to enforce the bridging role of Macau between China and Latin America. Events and activities of low politics such as in the areas of business, culture, academic and tourism have been organized regularly and frequently in Macau for connecting the LAC countries closer to China.

In September 2007, MAPEAL has hosted the 13th Congress of FIEALC in Macau with the support of the local government. It was the first time for Macau to have received over 400 academics and intellectuals coming from 34 countries for in-depth discussions about Latin America and the world.

In the field of business, MAPEAL has been organizing the “Latin American Pavilion” and Business Forums at the biggest local annual event, the “Macao International Trade and Investment Fair” (MIF) since the year of 2008 for the promotion of business links between the two regions. With the support of the local government and the collaboration of the Embassies in Beijing and the Consulates General in Hong Kong, Macao and Guangzhou, the “Latin American Pavilion” has been promoting the different Latin American and Caribbean products and services to the local community as well as to the fair visitors from all over the world.

In 2017, countries participated in the “Latin American Pavilion” were Argentina, Brazil, Bolivia, Chile, Colombia, Cuba, Ecuador, Mexico, Panama, Peru, Uruguay and Venezuela.

On the cultural front, events like the “Latin American Cultural Festival” and the “Parade through Macao, Latin City” have already become two major cultural events for the promotion of the Latin cultures in Macau. National cuisines, cultural seminars, literary works, films, artworks, dance and music performances of different Latin American and Caribbean countries have been

presented in the city for the purpose of encouraging more extensive cultural interactions between the two regions.

As the only association in Macau devoted to the promotion and strengthening of links between China and the Latin American and Caribbean countries, MAPEAL keeps exerting every effort to carry out its missions and achieve its goals. As we know, not only is it necessary to build up an optimal relation between the two regions, but also to have it maintained well into the future!

7. Conclusion

There is no doubt that Latin America has reinforced progressively its international position at the beginning of XXI century and successfully diversified contacts with the new political and economic partners in the contemporary world. On the other side, we could also note that China's interests in Latin America are increasing in the domain of investments, commerce and cooperation in security and defense questions. Consequently, China cooperates in the field of energy, copper, food products and commodities in general. In any case, all this indicates that China's policy towards Latin America is notably pragmatic and in line with its internal increasing needs as a result of accelerated economic growth and intensive global international strategy of expanding economic, political and cultural influences. In this context, Macau as a Special Administrative Region with high level autonomy inside China could be transformed strategically into an important and active player especially with Latin American countries.

There is a concrete basis for these arguments. Historically, Macau has been a Portuguese trading post in the Far East for over 442 years. After the Handover in 1999, Macau was officially returned to China as a Special Administrative Region. At present, Macau is the "world's top gaming capital" and a part of the Greater Bay Area of national strategic importance in southern China.

As depicted above, Macau is inherited with a unique historical and cultural background as well as gifted with some extra privileges because of its special status in the country which subsequently made itself quite different from the other mainland cities in China. By capitalizing on her core strengths and special privileges, Macau can go much further, not only as a gaming and tourism city but also an effective and efficient platform between China and Latin America.

The consolidation of its *inherent characteristics* such as the long-established historical links with the Latin world, the unique cross-cultural experience, the status of Special Administrative Region of China and the *regional development initiatives* such as the Pearl River Delta & Pan-Pearl River Delta development initiatives and the Greater Bay Area initiative is, in effect, leveraging Macau's soft-power attributes to its advantage. By serving as an effective soft-power hub

of the nation, Macau can contribute more in helping build an extension of the “Belt and Road” to Latin America, specifically in the Pacific Rim.

Furthermore, as a special administrative region embracing freedom in different aspects, Macau is having a comparative advantage over the other mainland cities. By making good use of the formal instruments like sister-cities agreement, trade office, trade agreements or other international agreements and the informal mechanisms such as the non-governmental events and activities organized by the NGOs, Macau can assist further in enhancing the relations or facilitating the establishment of official ties between China and the Latin American countries in a more pragmatic and flexible way.

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MAKAO KAO SPONA IZMEĐU KINE I LATINSKE AMERIKE

Od početka 21. veka svedoci smo održivog i ubrzanog razvoja odnosa između Kine i Latinske Amerike i Kariba. Postoji široko ubeđenje da se u budućnosti može predvideti jača veza između ovih regiona koja obećava.

Istorijski posmatrano, Makao je portugalska trgovačka postaja na dalekom istoku već više od 442 godine. Posle primopredaje 1999. godine, Makao je zvanično vraćen Kini kao poseban administrativni region. Danas Makao predstavlja „najveći svetski kockarski kapital” i deo područja Velkog zaliva od nacionalnog strateškog značaja u južnoj Kini. Koristeći svoje osnovne prednosti i posebne privilegije, Makao može ići mnogo dalje, ne samo kao grad igara i turizma, već i kao efikasna i efektivna platform između Kine i Latinske Amerike.

Osim toga, uz novu megastrukturu, ogromnu logističku mrežu i inicijativu Oblasti šireg zaliva, Makao može da posluži kao efikasna baza nacije za pomoć u izgradnji produžetka “Pojasa i puta” prema Latinskoj Americi i regionu Pacifika.

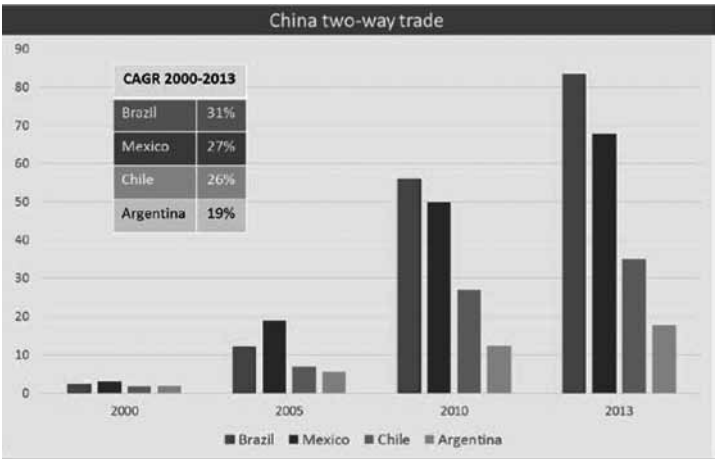
Ključne reči: Makao, poseban administrativni region Kine, Oblast šireg zaliva, Pojas i put, odnosi Kine i Latinske Amerike

Overview
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**MACAU – LATIN AMERICA: A NEW AIR BRIDGE
BETWEEN HIGH-GROWTH MARKETS**

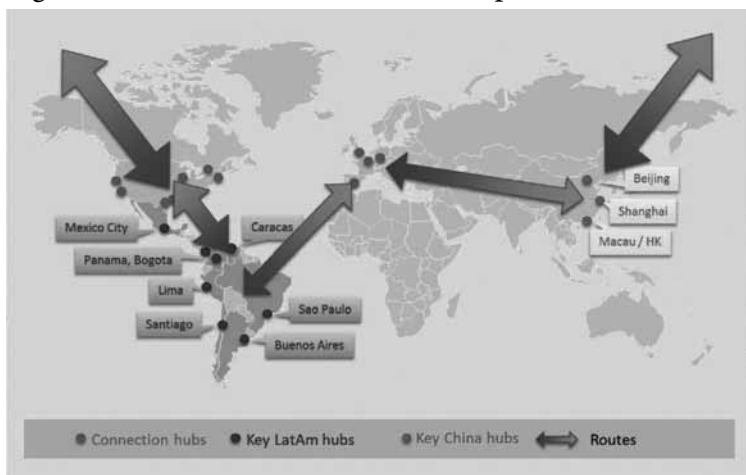
In the first half of October, 2015, MAPEAL (Macau Association for the Promotion of Exchange between Asia-Pacific and Latin America) hired Latin America’s leading independent market intelligence firm, AMI, to conduct preliminary research on the potential market for a more direct air route between Macau and Latin America. Though a deeper viability study is still required, the initial results are very encouraging.

Chinese-Latin American trade and investment flows are some of the fastest growing in the world, expanding at more than 20% per year over the last fifteen years. It is these business links that have fostered a mutual curiosity in two regions that brim with cultural and natural jewels that attract worldwide travellers. This year, over 200,000 Chinese will visit Latin America and more than 300,000 Latin Americans will visit the middle kingdom. Though growing at formidable rates, tourism flows between these world-class destinations are yet to realize even a fraction of their potential. Last year, Latin Americans spent over \$70 bn USD travelling outside their home countries. Less than 0.6% of that was spent visiting greater China markets.



* Americas Market Intelligence (Miami, Mexico City, Sao Paulo and San Francisco)

One of the impediments to tourism flows is the circuitous path that travellers must take, most frequently via a US airport, which obliges them to obtain a C-1 visa in order to transit. This is particularly an obstacle to outbound Latin American travellers, because less than 4% of the region possess a US travel visa. A more direct path to China, via Macau and a non-US transit point, would help carriers tap into a vast demand. Latin Americans are fascinated by China, understanding full well the strategic importance of their large new economic partner. It comes as no coincidence that Chinese is the fastest growing foreign language taught to Latin American children and professionals alike.



For Chinese travellers who have already visited Europe, the US, and East Asia, the natural wonders of Latin America are an inviting next step, as the world's fastest growing, and soon to be largest, outbound traveller market strives to satisfy its worldly curiosity. What is lacking still for the Chinese market is a compelling Latin American - Caribbean tour package that is designed specifically for the particular tastes and preferences of upper-middle class Chinese travellers.

In order to create a competitively priced air bridge between Macau and Latin America, commercial airlines will look to fill inline capacity with high value air cargo. China-Lat. Am. is one of the fastest growing air cargo corridors in the world, growing at close to 10% per year over the last decade. High tech, medical and specialized equipment is most commonly shipped by air from China to the Americas while fresh fruits, vegetables, flowers and fish are increasingly exported from western South America (Chile, Ecuador, Peru, Colombia) to China. Fresh fish exports from Chile to China grew 63 fold from 2010-2013. Recent depreciations to Chile, Colombian, Brazilian and Mexican currencies enables suppliers in those countries to under-price traditional competitors found closer to China in SE Asia and Europe.

Pharmaceutical exports from China to Latin America as well as horticulture, fish and meat exports from South America to China will all benefit from avoiding US airports where onerous US regulations are enforced upon even transiting air cargo. The heavy burdens of US food and drug import regulations not only add compliance costs to suppliers, they help create distribution bottlenecks, driving up pricing. For example, 70% of Colombian flower production capacity is owned by US flower importer-distributors. As a result, US consumers pay elevated prices for flowers. Those same importers control much of the re-exported flowers that go onto other markets. A more direct air cargo link that avoids any US hub will deliver cost savings and speed to a price sensitive market.

Growing links between China and Latin America will continue to underpin high growth in demand for air passenger and cargo capacity. HKG, the traditional gateway for this traffic, is reaching saturation. Macau's airport, by contrast, is underutilized. For both demand and supply reasons, a Macau-Lat Am air bridge is worth exploring in greater detail. What is needed next are viability studies to explore the potential for both passenger and cargo business models run through Macau's international airport.

For this ambitious project to work, support will be needed from several key players from the Macau airport to leading air carriers to travel agencies who recognize the potential. MAPEAL and its supporters in the Macau government are proud to take the first step in the lengthy planning process ahead. It is projects like this one that are vital to delivering diversity and growth to the Macau economy.

Overview

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TOWARD A NEW ASIA-PACIFIC PARTNERSHIP: CHINA-LAC

The bilateral relations between China and Latin American and Caribbean countries (LAC) are rich in their history and their agenda. The bilateral links go back to almost 3000 years ago, when an expedition dispatched by Shang Dynasty landed in Peru as its destination. Several links were established with pre-Inca cultures of those days. They are a number of historical remnants and vivid customs in the Mochica, Chavin, Chimu and Nazca Cultures. It was definitely the first contact of China with Latin America. Later on, the first organized migration of Chinese citizens went to the Americas in the 1840, helping to build railroads in the USA and looking for gold in Peru. In this process, Macao had a prominent role which is reflected in many ways.

This process of the Chinese culture has influenced into the local societies and has created a unique Asian-LAC personality. Today, the Chinese culture is present in every manifestation of our local culture in many of the LAC countries. In terms of number of the Chinese communities, the largest one is in Peru with almost 3 million people, which represent 9% of the total Peruvian population. In terms of its size, it is the second one in the Western Hemisphere.

The ancestors of most of the Chinese communities in LAC are natives to the South of China, from Canton to Macao, from Zhuhai to Hong Kong. It explains why many Chinese southern traditions exist in the LAC countries, with a clear influence in the gastronomy. The case of Peru could be highlighted, the insertion of the Chinese community into the Peruvian society has created new customs and what is well-known as “Peruvian-Chinese culture”, with its own oral expressions and traditions. Peru is the only country in the world where Chinese restaurants are called “chifas”, which is a variation of the word “chifan”, that the Chinese people use for “let’s eat”. This closed culture links are a good foundation for the today people-to-people policies between China and Latin America. It is an authentic common ground in the bilateral ties and an advantage if you compare the relation of China with other regions. The Chinese leaders and the private sector, besides the civil society organizations, feel quite comfortable when they

* Ambassador Extraordinary & Plenipotentiary of Peru to the People’s Republic of China

deal with the LAC societies, since there is a genuine base for understanding and communication.

This singular feature of the relation of LAC with China has lead the dialogue oriented to establish a promising new scenario, based on a spirit of reciprocal cooperation and a friendly understanding of the needs of all parties. In modern terms, this singular characteristic will promote a stable and a mutually beneficial relation within a framework which includes interdependence, economic complementarity and social inclusion. A comprehensive concept of connectivity and integration will help LAC countries to establish shared goals with China and the rest of the world, and will help to upgrade the growth of their economies. It will also help the LAC countries to match the requirements of globalization.

In this sense, the new scenario for the Asia-Pacific Partnership and its contents could be defined and be focused on three areas of the new partnership:

- Economic complementarity
- Transfer of technology
- Regional coincidence

With respect to the economic complementarity, it is evident today more than ever that Latin America can have an important participation in the Asian economies, particularly in China. The industrial development and economic growth of China have changed its pattern of consumption, both in the private sector and in its population. China buys from overseas almost 60% of its needs of food and industrial inputs which could be supplied by LAC countries. In terms of geo-economy, LAC countries possess the richest and vastest lands for agricultural, fishery, energy, and mining products, all of them demanded by China. It is here where Macao could play the bridge role between the final consumers and the providers from Latin America. Not only because of its historical links with LAC countries, but also because of its cultural heritage and its perspectives from the importance of S&T Development Triangle Macao-Zhuhai-Hong Kong. Macao has an inside knowledge of the functioning of Far East Asian economies that could help both sides across the Pacific to establish an effective bridge for exchanges of knowledge, trade, and investment. It will disseminate the benefits of the globalization to the LAC countries.

This brings to the second era of the new partnership which consists in the transfer of technology for the promotion of the shared development. Today it does not matter who owns the national resources, what is important is who owns the knowledge and technology to use the resources. From a perspective of the global economy, only those economies that promote efficiency and equality in their structures can be competitive and therefore be identified as an investment opportunity. In this context, it is important to mention that under the terms of this new scenario the investment of the Chinese corporations in LAC countries includes, in many of the cases, are elements of technology transfer. As an example,

the Mining Project of Pampa de Pongo can be mentioned, in the province of Caraveli in the southern part of Peru of the Chinese company Zhongrong Xinda. The development of this project is not limited to the mining exploration and exploitation, it also involves the building of an industrial park besides the mining site, the construction of a road and an automatic belt for the transport of the products, the building of a refinery for the necessary manufacture of the products to be exported, the erection of a pier for four hundred thousand tons. Besides that, there is the building of the desalinization water processing plant, and of an energy transmission line to provide electricity to the mining area. The water processed in the desalinization plant and the energy from the power plant will also be provided to the communities nearby the mining site. In other words, this represents a new dimension for the transfer of technology as part of a modern corporate social responsibility. This project could not be just a role model for Peru mining investments, but also for LAC countries. It will promote technology transfer, innovation, and industrial development introducing new technologies in the region.

This new partnership can also be seen in terms of financial contribution. In June 2012, during the ECLAC conference, the former Prime Minister Wen Jiabao expressed the most generous financial contribution that has ever been received by LAC countries. It was later increased in 2013 by President Xi and it was formulated as a comprehensive vision through the 1+3+6 introduced by President Xi. It just concluded the II China- CELAC Foreign Affairs Ministers Meeting in January 23 in Chile examining the ways of how to implement this financial cooperation. The vision of China about it had been introduced by President Xi during his speech at the National Parliament of Peru in November 2016.

Under this framework, a mention has to be made regarding the role Asian Infrastructure Investment Bank (AIIB) could play with our Latin American Development Bank. Today some LAC countries are members of AIIB and they are studying how to use the existing funds to promote their national development strategies. In this process, the Latin American Development Bank (former CAF) could be the financial counterpart in Latin America.

About the regional coincidence, China, Macao and Latin America and Caribbean countries share the goals of trade liberalization, investment facilitation, and regional integration. In this sense, under the One Belt One Road Initiative of President Xi, culture and trade between Far East Asian and LAC countries could be the engine for a genuine dialogue on development and globalization. The OBOR Initiative could help to establish common goals in benefit of the Small and Medium Enterprises in LAC countries in terms of employment, education and income. OBOR cannot be seen only as a physical integration scheme. It has to be seen also from the institutional and connectivity perspective. It is the answer to the de-globalization process that the international economic systems show nowadays. It is the opposite to protectionism and confrontation. In this context,

the role of the Chambers of Commerce, think tanks, and academic institutions could be crucial using e-commerce platforms. The B2B e-commerce companies like Jumore in China will help to strengthen the links between China and LAC countries and will also enhance online marketing and sales in benefit of SMEs. It could represent the digital bridge in a new version of the Maritime Silk Road changing it to the Digital Silk Road of the 21st Century.

In this scenario, OBOR could be linked with the Pacific Alliance, the most dynamic integration mechanism in LAC countries, whose members are Chile, Colombia, Mexico, and Peru. The Pacific Alliance was created to promote the relation with Asia bearing in mind that a new version of TPP could be launched in March 2018. It will be important that the new format will not discriminate any country of the Asia-Pacific community. The presence of China, the first trade partner of some LAC countries, will be fundamental in its functioning. At the end, the vision of the APEC foundation about the Free Trade Area of the Asia-Pacific (FTAAP) would be finally accomplished by the integration of the new TPP, RCEP, and the Pacific Alliance.

A new relation between China and LAC definitely has to include Macao. A new partnership has to rely on an economic basis, historical and cultural backgrounds, and common goals. It could represent the beginning of the new era of hope and development for LAC countries. A rich historical background and promising bilateral agenda can define a better future for the Asia-Pacific community. It will depend on the commitment of the three parts: Macao and its historical and technological role, China as the world's second largest economy with superavit in trade and outbound investment, and LAC countries with their desire to work together towards a new and emerging partnership in the region.

UGOVORNI IMOVINSKI REŽIM VANBRAČNIH PARTNERA

Predmet istraživanja u ovom radu je ugovorni imovinski režim vanbračnih partnera u pravu Republike Srbije.

Porodični zakon (2005) predviđa mogućnost da vanbračni partneri svojom voljom urede vanbračnoimovinske odnose, na način kako to odgovara njihovim interesima. Iz navedenog sledi da je naše pravo uvelo mogućnost zaključenja vanbračnih ugovora i time režim zajedničke imovine koji je do tada bio prinudan i nije se mogao menjati, sada vanbračni partneri mogu ugovorom isključiti, menjati ili ugovoriti. Ugovorni imovinski režim ima značajne pravne i društvene posledice, kako za odnose partnera u vanbračnoj zajednici, tako i za njihove odnose na društvo. U tom smislu analizirali smo imovinske odnose u vanbračnoj zajednici, autonomiju volje u regulisanju imovinskih odnosa, ugovorni imovinski režim vanbračnih partnera i karakteristike vanbračnih ugovora. Takođe analizirali smo društvenu i pravnu opravdanost ugovornog imovinskog režima vanbračnih partnera u našem pravu. Cilj istraživanja je bio da se upozna i objasni regulativa imovinskih odnosa vanbračnih partnera, sa pravnog i društvenog aspekta. U radu je korišćen pravni i sociološki metod prilikom utvrđivanja sadržine pozitivnog prava i dejstva pravnih normi koje regulišu imovinske odnose vanbračnih partnera. Takođe izloženo je i shvatanje pravne nauke, koje se odnosi na ovaj pravni institut.

U radu smo razmatrali ugovore vanbračnih partnera kao model regulisanja imovinskih odnosa u vanbračnoj zajednici in genere.

Ključne reči: *imovinski odnosi u vanbračnoj zajednici, autonomija volje u regulisanju imovinskih odnosa, ugovorni imovinski režim vanbračnih partnera, karakteristike vanbračnih ugovora.*

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1. Imovinski odnosi u vanbračnoj zajednici

Pitanje regulisanja vanbračnih imovinskih odnosa spada u red najsloženijih pitanja porodičnog prava. Razloge treba tražiti u kategoriji lica na koju se ova materija odnosi, kao i u samom odnosu vanbračnih partnera koji je prožet ličnim i emotivnim vezama, koje osiguravaju posebnost porodičnog prava u odnosu na druge grane prava.

Takođe, vanbračna zajednica je jedna od ustanova porodičnog prava koju je teško definisati, "na način koji bi bio univerzalno primenljiv".¹

Imovinski odnosi između članova porodice, gde pripadaju i vanbračni partneri, imaju drugačije značenje, nego imovinski odnosi koji se zasnivaju između strana koje ne pripadaju porodičnom krugu. Drugačije značenje proizilazi iz okolnosti da su porodični odnosi zasnovani na posebnoj vezi subjekata u vanbračnoj zajednici i na njihovim posebnim ličnim svojstvima.²

U porodičnom pravu se ne radi o imovinskim odnosima, kakvi postoje među uobičajenim ugovornim stranama, već o imovinskim odnosima koji su prožeti emocijama. Zato i regulisanje ovih odnosa za zakonodavca predstavlja složen i težak posao.

U našem pravu imovinski odnosi vanbračnih partnera regulisani su Porodičnim zakonom.³

Pored vanbračnog ugovora, Porodični zakon pominje još samo ugovor o upravljanju i raspolaganju zajedničkom imovinom i ugovor o poklonu.⁴ Očigledno je da pomenuta tri ugovora ne mogu da zadovolje potrebu za regulisanjem brojnih ugovora koje vanbračni partneri mogu zaključiti povodom njihove imovine. Ovo se posebno odnosi na ugovor o poklonu, gde u tom delu zakon ne reguliše ono što i piše u zakonu - ugovor o poklonu, već zakon reguliše vraćanje poklona nakon prestanka vanbračne zajednice. (tekst podvukao D.N.)

Takođe, pomenuti zakon samo u jednom članu reguliše imovinske odnose vanbračnih partnera.⁵

Ostala imovinska pitanja između vanbračnih partnera nisu izričito u Porodičnom zakonu regulisana.

Porodični zakon reguliše pravni status vanbračne zajednice i određuje da je vanbračna zajednica izjednačena sa bračnom zajednicom.⁶

¹ Kovaček Stanić Gordana (2002): *Uporedno porodično pravo*, Novi Sad, 120.

² Više o tome: Draškić Marija (2005): *Porodično pravo i prava deteta*, Beograd, 14.

³ Porodični zakon Republike Srbije (u daljem tekstu: PZ.), *Službeni glasnik Republike Srbije*, 18/2005, 72/2011, 6/2015.

⁴ Videti: PZ. Bračni ugovor, čl.188. Ugovor o upravljanju i raspolaganju zajedničkom imovinom, čl.189. Ugovor o poklonu čl. 190.

⁵ PZ. čl. 191/1 kaže: „Imovina koju su vanbračni partneri stekli radom u toku trajanja zajednice života u vanbračnoj zajednici predstavlja njihovu zajedničku imovinu“.

⁶ PZ. čl.4/2. kaže: „Vanbračni partneri imaju prava i dužnosti supružnika pod uslovima određenim ovim zakonom“.

Da bi se mogao primeniti imovinskopravni režim koji važi za supružnike i na odnose vanbračnih partnera, vanbračna zajednica mora ispuniti određene zakonske uslove u pogledu postojanja trajnije zajednice života žene i muškarca između kojih nema bračnih smetnji.⁷ Kada se ispune zakonske pretpostavke za postojanje vanbračne zajednice, na imovinske odnose vanbračnih partnera shodno se primenjuju odredbe ovog zakona o imovinskim odnosima supružnika⁸ i vanbračna zajednica postaje zakonska, zaštićena, slobodna.⁹

Porodično pravo poznaje dva imovinska režima supružnika-vanbračnih partnera: zakonski režim posebne i zajedničke imovine, regulisan zakonom i ugovorni imovinski režim, kada supružnici-vanbračni partneri svojim sporazumom uređuju imovinske odnose.¹⁰

U odsustvu ugovora o regulisanju imovinskih odnosa vanbračnih partnera primenjuje se zakonski imovinski režim.

Kada vanbračna zajednica ne ispuni zakonom propisane uslove, ona ne uživa porodičnopravnu zaštitu (ne proizvodi imovinskopravna dejstva u smislu Porodičnog zakona) i tada se govori o nezakonitoj (nezaštićenoj, neslobodnoj) vanbračnoj zajednici.

To je slučaj kada je zajednica života bila privremena ili ograničena, ili kada dva lica žive i ponašaju se kao supružnici, ali ne mogu da se venčaju usled postojanja bračnih smetnji (bračnosti, nesposobnosti za rasuđivanje, srodstva, starateljstva, maloletstva i mana volje). Sporovi vezani za ove vanbračne zajednice, koji proizilaze iz imovinskih odnosa, rešavaju se prema pravilima građanskog prava,¹¹ koja se odnose i na sve druge građane, a ne samo vanbračne partnere.

Danas u našem društvu vanbračnih zajednica ima sve više i njihov broj je nemoguće utvrditi zbog nepostojanja registra vanbračnih zajednica. Tako se ove zajednice pojavljuju „kao konkurentska forma života prema braku“.¹²

Ujedno ovakve zajednice stvaraju i pravnu nesigurnost za pribavioca prava, usled nemogućnosti provere da li je prenosilac prava (npr. prava na nepokretnosti) u vanbračnoj zajednici ili nije. To će navesti pribavioca da od prenosioca prava zahteva izričitu izjavu da predmet ugovora nije stečen u vanbračnoj zajednici,¹³ što usporava pravni promet.

⁷ PZ. čl.4/1. kaže: „Vanbračna zajednica je trajnija zajednica života žene i muškarca, između kojih nema bračnih smetnji (vanbračni partneri).“

⁸ PZ. čl. 191/2. kaže: „Na imovinske odnose vanbračnih partnera shodno se primenjuju odredbe ovog zakona o imovinskim odnosima supružnika“. PZ. čl. 171/2. kaže „Supružnici mogu bračnim ugovorom drugačije urediti svoje imovinske odnose“.

⁹ Draškić Marija (1988): *Vanbračna zajednica*, Beograd, 2.

¹⁰ Videti: PZ. čl.168.-191.

¹¹ isto: Draškić Marija (2005), 416. Kovaček Stanić Gordana (2014): *Porodično pravo, partnersko, dečje i starateljsko*, Novi Sad, 188.

¹² Ponjavić Zoran (2007): *Porodično pravo*, Kragujevac, 120.

¹³ Isto: Panov Slobodan (2014): *Porodično pravo*, Beograd, 351.

2. Autonomija volje u regulisanju imovinskih odnosa

Autonomija volje,¹⁴ koja dopušta slobodnu inicijativu u kreiranju porodičnopравnih odnosa i mogućnost drugačijeg definisanja imovinskih odnosa u porodičnom pravu, karakteristična je za građansko pravo čiji deo je i porodično pravo.

Opšti osnov za slobodno uređivanje imovinskih porodičnih odnosa pruža opšta odredba Porodičnog zakona.¹⁵

U našoj zemlji u današnje vreme pridaje se sve veći značaj slobodi ugovaranja u privatnopravnim odnosima, koja se konkretizuje putem slobode odlučivanja da se zaključi ugovor ili da se ne zaključi, da se odredi njegova sadržina i sl. Ta sloboda ugovaranja se primenjuje i na terenu Porodičnog prava, što znači da vanbračni partneri mogu sporazumno uređivati svoje imovinske odnose.

To je izraz demokratizacije unutar porodičnih odnosa i nastojanja da se imovinski odnosi prilagode uslovima tržišne privrede, odnosno da se omogući što manje mešanje javne vlasti u privatne porodične odnose.

Vanbračni partneri uređuju imovinske odnose tako što ih ugovorom prilagođavaju svojim stvarnim potrebama i interesima, u vreme dok su odnosi među njima još uvek skladni. Cilj ovakvog ugovaranja sastoji se u pravnoj sigurnosti samih partnera i trećih lica.

Ako partneri ne zaključe ugovor, njihova imovina se reguliše kroz režim zajedničke imovine, a to otežava realizaciju „čistih“ dužničkopoverilačkih odnosa trećih lica naspram vanbračnih partnera i vanbračnih partnera međusobno. Naime, sastav imovine kojom vanbračni partneri zajedno, odnosno svaki od njih pojedinačno, odgovaraju za preuzete obaveze je izvesniji i vrednost imovine se može lakše proceniti, odnosno poverilac se može lakše namiriti ako je imovina vanbračnih partnera određena vanbračnim ugovorom.

Tako zakonske norme o imovinskim posledicama vanbračne zajednice (zakonski režim imovinskih odnosa) postaju dispozitivna pravila, koja se imaju primeniti samo ako vanbračni partneri nisu drugačije ugovorili. Dakle zaključenjem vanbračnih ugovora isključuje se iz primene zakonski imovinski režim vanbračnih partnera.¹⁶

¹⁴ Više o autonomiji volje: Antić Oliver (2011): *Obligaciono pravo*, Beograd, 36-40. Kovačević Kuštrimović Radmila, Lazić Miroslav (2008): *Uvod u građansko pravo*, Niš, 99.. Stojanović Dragoljub, Antić Oliver (2004): *Uvod u građansko pravo*, Beograd, 26.5

¹⁵ PZ. čl. 9. kaže: "Imovinski odnosi u porodici uređuju se zakonom, a mogu se uređivati i sporazumno, u skladu sa ovim zakonom".

¹⁶ PZ. čl. 188/2. određuje da prilikom potvrđivanja (solemnizacije) ugovora javni beležnik je dužan da ugovornike upozori da se njime isključuje zakonski režim zajedničke imovine.

To će u praksi učiniti vanbračni partneri koji ne žele da se zakonodavac meša u njihove imovinske odnose i tako im odredi udele u zajedničkoj imovini (zakon pretpostavlja da su udele u zajedničkoj imovini jednaki).¹⁷

Iz navedenog sledi da ni primena zakonskog imovinskog režima vanbračnih partnera (u nedostatku postojanja vanbračnih ugovora) nije moguća ako stranke na to ne pristanu. Dakle, primena zakonskog imovinskog režima ili ugovornog imovinskog režima uvek je posledica sporazuma vanbračnih partnera.

To znači i da je ugovorni režim u stvari zakonski, s obzirom da su zakonom propisani režimi koje vanbračni partneri biraju svojim sporazumom. Podela na zakonske i ugovorne režime izvršena je s obzirom na činjenicu da li su vanbračni partneri svojom voljom izabrali imovinski režim koji žele ili nisu.¹⁸

U okviru ugovornog imovinskog režima vanbračni partneri su slobodni da zaključuju sve pravne poslove koji se tiču njihove posebne imovine (npr. ugovor o prodaji, ugovor o poklonu, ugovor o razmeni, itd.), ali i sve pravne poslove koji se odnose na režim zajedničke imovine (npr. vanbračni ugovor, ugovor o upravljanju i raspolaganju zajedničkom imovinom, ugovor o deobi zajedničke imovine, itd.).

Sloboda ugovaranja je ograničena samo na one pravne poslove kojima se ne "vredaju imperativne norme porodičnog prava uopšte".¹⁹

3. Ugovorni imovinski režim vanbračnih partnera

Kao što je navedeno, vanbračni partneri mogu imovinske odnose da urede putem ugovora.²⁰ Rukovodeći se osnovnim načelom autonomije volje određenim u Zakonu o obligacionim odnosima, strane su slobodne da pod određenim uslovima svoje odnose urede po svojoj volji.²¹

Dakle, ugovorne strane, svojim sporazumom uređuju svoje imovinske odnose na postojećoj ili budućoj imovini,²² shodno svojim interesima i

¹⁷ PZ. čl. 180/2. kaže: „Pretpostavlja se da su udele supružnika (vanbračnih partnera) u zajedničkoj imovini jednaki“.

¹⁸ Kovaček Stanić Gordana (2014), 121.

¹⁹ Draškić Marija (2005), 410. Npr. vanbračni partneri ne mogu zaključiti ugovor kojim se jedan partner odriče prava na zajednički život, prava na uzajamno poštovanje i pomaganje, prava na slobodu izbora rada i zanimanja, prava na zakonsko izdržavanje itd.

²⁰ Isto: Draškić Marija (2005), 411. Kovaček Stanić Gordana (2014), 188.

²¹ Zakon o obligacionim odnosima (u daljem tekstu: ZOO), *Službeni list Socijalističke Federativne Republike Jugoslavije*, 29/78, 39/85, 45/89- odluka USJ. 57/89. *Službeni list Savezne Republike Jugoslavije*, 31/93, *Službeni list Srbije i Crne Gore*, 1/2003- Ustavna povelja

²² PZ. Bračni ugovor, čl.188/1. koji kaže: „Supružnici odnosno budući supružnici mogu svoje imovinske odnose na postojećoj ili budućoj imovini urediti ugovorom (bračni ugovor)“. U praksi shodno citiranom članu zakona jedna od odredaba vanbračnog ugovora mogla bi da glasi: „Sada nemamo ništa, a sve što budemo stekli, podelićemo kako nama

očekivanjima, tako što ih regulišu ugovorom ili prihvataju zakonski imovinski režim, koji mogu i menjati.

Tako npr. vanbračni partneri u smislu porodičnog prava mogu ugovorom regulisati dispozitivne zakonske norme (zaključiti vanbračni ugovor, zaključiti ugovor o upravljanju i raspolaganju zajedničkom imovinom itd.), a ne mogu se sporazumovati o imperativnim zakonskim normama (obavezi vođenja zajednice života, dužnosti uzajamnog poštovanja i pomaganja i pravu na slobodu izbora rada i zanimanja).

Takođe, vanbračni partneri su slobodni da zakluče sve pravne poslove²³ koji se tiču njihove posebne imovine (npr. ugovor o prodaji, razmeni, poklonu, doživotnom izdržavanju itd.), ali i sve pravne poslove, koji se odnose na režim zajedničke imovine supružnika (npr. vanbračni ugovor, ugovor o upravljanju i raspolaganju zajedničkom imovinom, ugovor o deobi zajedničke imovine itd.).

Na imovinske odnose vanbračnih partnera koji nisu uređeni Porodičnim zakonom, primenjuju se odredbe zakona kojima se uređuju obligacioni odnosi.²⁴

Prema Zakonu o obligacionim odnosima,²⁵ odredbe ovog zakona biće primenjene, osim na obligacionopravne ugovore, i na druge ugovore i pravne poslove, osim ako za ugovore u privredi nije drugačije određeno. Prema tome, Zakon o obligacionim odnosima se primenjuje i na ugovore koje zaključuju vanbračni partneri, kao *lex generalis*, osim ako posebna pravila nisu predviđena kao *lex specialis*. U vanbračnoj zajednici je nužna životna zajednica, odnosno zajedničko domaćinstvo²⁶ vanbračnih partnera (nužno je da imaju zajedničko prebivalište), dok svaki supružnik može zadržati sopstveno prebivalište koje je imao i pre sklapanja braka i supružnici ne moraju voditi zajedničko domaćinstvo²⁷.

Vanbračno imovinsko ugovaranje je zakonom dozvoljeno, ali je moguće utvrditi ništavost takvih ugovora, odnosno nekih njegovih delova *in concreto*, od slučaja do slučaja. Ništavost bi se cenila prema pravilima građanskog, porodičnog, obligacionog, naslednog i stvarnog prava u zavisnosti iz koje grane prava potiče ugovor.

odgovara“. Šta znači buduća imovina i kako je regulisati? Ovakva pravna norma je nejasna i neprihvatljiva za pravno tumačenje. (Podvukao tekst D.N.)

²³ Videti: Stanković Obren (ur) (1996): *Leksikon građanskog prava*, Beograd, 61.

²⁴ Videti: PZ. čl.196. gde se predviđa da će se na imovinske odnose vanbračnih partnera, koji nisu uređeni ovim zakonom, primenjivati odredbe zakona kojim se uređuju svojinskopравни odnosi i zakona kojim se uređuju obligacioni odnosi.

²⁵ Videti: ZOO. čl.25/1. i čl. 25/3. gde se predviđa da će se odredbe ovog zakona primenjivati, osim na obligacionopravne ugovore i na druge ugovore i pravne poslove (npr. vanbračne ugovore), osim ako nije izričito drugačije određeno.

²⁶ Gams Andrija, Đurović Ljiljana (1985): *Bračno i porodično imovinsko pravo*, Beograd, 235.

²⁷ Videti: PZ. čl.27, koji govori o sporazumnom određivanju mesta stanovanja i vođenja zajedničkog domaćinstva supružnika.

Takođe, postojanje ličnih odnosa²⁸ u kojima se već nalaze ugovorne strane, nalaže da se prilikom procene punovažnosti vanbračnih ugovora naročito vodi računa o ravnomernoj zaštiti načela autonomije volje, s jedne, te javnog poretka i morala, s druge strane, što predstavlja složen posao za učesnike u pravosudnoj praksi.

I u većini savremenih prava prihvaćeno je pravilo da su vanbračni partneri načelno slobodni da međusobno zaključuju sve vrste ugovora, „pa i one kojima će proširiti pravila bračnog imovinskog režima na vanbračnu zajednicu“ (belgijsko pravo, dansko, englesko, francusko, nemačko itd).²⁹

Iz navedenog proizilazi da se u našem, a i u uporednom pravu, napušta kao isključivi način regulisanja međusobnih odnosa vanbračnih partnera zakonski imovinski režim, koji ustupa mesto ugovornom imovinskom režimu.

Sledstveno tome, proizilazi da se vanbračni ugovori kako u praksi tako i u teoriji porodičnog prava, moraju analizirati u širem kontekstu ugovornog prava,³⁰ budući da se Zakon o obligacionim odnosima primenjuje na vanbračne ugovore kao *lex generalis*.

Kako se radi o pravnom poslu-ugovoru, to vanbračni partneri samo sporazumno putem ugovora, mogu regulisati svoje imovinske odnose, što znači da jednostrana izmena ovog ugovora nije moguća.

4. Karakteristike vanbračnih ugovora

Imovinski ugovori koje zaključe vanbračni partneri, razlikuju se od drugih ugovora obligacionog prava. Razlika se ogleda u činjenici da se vanbračni partneri već nalaze u jednoj drugoj pravnoj vezi - vanbračnoj zajednici, koja je od posebnog društvenog značaja i predstavlja osnov vanbračne porodice.³¹

Vanbračna zajednica predstavlja specifičan pravni odnos pretežno lične prirode, budući da su lica vezana ličnim vezama i interesima. Uzajamni lični odnosi vanbračnih partnera³² prožeti su i imovinskim odnosima. Kod ovih pravnih poslova emotivna veza prethodi imovinskom ugovaranju.

Iako na početku vanbračne zajednice mnogi vanbračni partneri toga nisu ni svesni, emotivna veza i imovinski odnosi vanbračnih partnera predstavljaju sastavni deo svake vanbračne zajednice.

Vanbračni partneri retko razmišljaju o imovinskopравnim aspektima svog odnosa, naročito u vreme kada su ti odnosi skladni, kada između njih postoji jaka

²⁸ Ponjavić Zoran, 366. Videti: O ličnim i imovinskim odnosima supružnika u braku

²⁹ Draškić Marija (2005), 416. Kovaček Stanić Gordana (2002), 120.

³⁰ Panov Slobodan, 354.

³¹ Draškić Marija (1988), 65. Videti: Prava i dužnosti vanbračnih partnera ličnog, ličnoimovinskog i imovinskog karaktera u porodičnom pravu.

³² Više o ličnim odnosima u porodici videti: Gams Andrija, Đurović Ljiljana, 3.

emotivna veza i kada među njima nema nikakvih sukoba. Tada se u najčešćim slučajevima ugovori zaključuju, s obzirom na situaciju *in concreto* i ne razmišlja se na okolnosti *pro futuro*.

Sklad i saglasnost u odnosima vanbračnih partnera ne dovodi u pitanje imovinske odnose. Suprotno tome, nesklad i nesuglasice među vanbračnim partnerima bitno menjaju i stanje imovinskih odnosa.

Kada se ti odnosi poremete, te dođe do prestanka vanbračne zajednice, raspravljanje imovinskih odnosa među ranijim partnerima realizuje se putem sudova, čime započinju dugotrajni i skupi sudski sporovi koji se po pravilu završavaju nezadovoljstvom obeju strana.

Kada dođe do sudske zaštite imovinskih prava vanbračnih partnera, pristupa se tumačenju vanbračnih ugovora koji se tiču njihove imovine.

Jezičko i logičko tumačenje ne može se odnositi samo na odnose koji se tiču imovine, već tumačenje treba da obuhvati i lične odnose vanbračnih partnera koji se već nalaze u vanbračnoj zajednici.

Iz toga sledi da su lični (neimovinski) odnosi primarni sastojak porodičnih odnosa, „jer osiguravaju posebnost porodičnog prava“³¹ i pretpostavljaju „nužnost postojanja međusobnog ličnog odnosa partnera u vanbračnoj zajednici“.³²

Postojanje ličnih odnosa uslovljava i ograničenja slobode ugovaranja, koja važi za svaki drugi ugovor obligacionog prava.³³

Naime, okolnost postojanja vanbračne zajednice dodatno uslovljava ograničenja pri zaključivanju ovih ugovora, budući da su strane ugovornice specifični subjekti - vanbračni partneri u vanbračnoj zajednici. Ta činjenica vanbračne partnere ograničava da kao ugovorne strane budu u svemu slobodne, kao što bi bila treća lica koja nisu u vanbračnoj zajednici. Odnos vanbračnih partnera kao ugovornih strana nije po pravilu odnos suprostavljenih strana koje su se slučajno našle na tržištu, već odnos strana sa zajedničkim ciljem (zajedničkim životom). S toga se ugovori koje zaključuju moraju uskladiti sa njihovim pravima i obavezama koje imaju u vanbračnoj zajednici.

Ograničenja proističu i iz imperativnih pravila kojima se regulišu lični i imovinski odnosi vanbračnih partnera u zakonitoj vanbračnoj zajednici, te je vanbračnim partnerima zabranjeno zaključivanje ugovora koji su suprotni imperativnim normama porodičnog prava.³⁴

³¹ Draškić Marija (2005), 14.

³² Počuća Milan, Šarkić Nikola (2011): *Porodično pravo i porodično pravna zaštita*, Beograd, 295.

³³ ZOO. čl.10 kaže: „Strane u obligacionim odnosima su slobodne u granicama prinudnih propisa, javnog poretka i dobrih običaja, da svoje odnose urede po svojoj volji“.

³⁴ Npr. vanbračni partneri ne mogu zaključivati ugovore kojima se regulišu njihova lična imovinska prava, kao što je ugovor kojim se jedan vanbračni partner unapred odriče prava na zakonsko izdržavanje, ugovor o odricanju prava na opoziv ugovora o upravljanju i raspolaganju zajedničkom imovinom, ugovor o odricanju prava na udeo u zajedničkoj imovini, ugovor o odricanju prava na deobu zajedničke imovine, itd.

Naime, iako se ugovorom regulišu samo imovinskopravni odnosi, nesumnjivo je da zbog složenosti tih odnosa i zavisnosti ovih i ličnih odnosa vanbračnih partnera, ugovori imaju značajne posledice na funkcionisanje zajednice života vanbračnih partnera.

Kod ovih ugovora postoji potreba da se zaštiti ekonomski slabiji vanbračni partner³⁵ prilikom zaključenja ugovora i to u većoj meri nego kada se radi o ugovornim odnosima između lica kod kojih ne postoje lični odnosi.

U praksi se pokazalo da su muškarci u velikom broju slučajeva imovinski imućniji od žena, pa vanbračni ugovor može ugroziti ravnopravnost vanbračnih partnera (supružnika).³⁶

Strana koja je u nepovoljnijem položaju usled socijalno-ekonomskih razloga, pristaje na zaključenje ugovora i prihvata obavezivanje na koje inače ne bi bila spremna da je u drugačijoj situaciji (npr. nema rešeno stambeno pitanje, trenutno je u lošoj materijalnoj situaciji, itd).

Jedna od značajnih karakteristika vanbračnih ugovora je i činjenica da na zaključenje vanbračnog ugovora, po pravilu insistira onaj vanbračni partner koji očekuje da će njegov imovinski doprinos vanbračnoj zajednici biti znatno veći u odnosu na drugog vanbračnog partnera.³⁷ Tako jedan vanbračni partner putem ugovora obezbeđuje kontinuitet sopstvene imovine i materijalne nezavisnosti.

Drugi vanbračni partner može želiti da zasnuje vanbračnu zajednicu po svaku cenu, ne razmišljajući o zahtevu prvog ili nemajući odgovarajuće znanje koje su pravne posledice toga da se zaključi vanbračni ugovor i isključi zajednička imovina.

Takođe, vanbračni partner može proceniti da je bolje da stupi u vanbračnu zajednicu i obezbedi sebi egzistenciju, nego da odbije zaključenje vanbračnog ugovora i umanjí izgleda na zasnivanje vanbračne zajedice.

5. Zaključak

Proučavajući i istražujući ugovorne imovinske odnose vanbračnih partnera *de lege lata*, došli smo do sledećih zaključaka:

Prema Porodičnom zakonu ugovorni imovinski režim vanbračnih partnera je dobio znatno širu primenu nego ranije.

Vanbračni partneri imaju mogućnost da se sporazumeju o svim elementima ugovora u vezi njihove imovine, te imaju mogućnost da svojom voljom isključe zakonski imovinski režim vanbračnih partnera, da ga prihvate ili menjaju.

³⁵ Kovaček Stanić Gordana, 135.

³⁶ PZ. čl. 3/3. kaže „Supružnici su ravnopravni“.

³⁷ Npr. jedan od vanbračnih partnera je čuveni fudbaler, koji ima višemilionski ugovor u evrima sa poznatim fudbalskim klubom i veruje da će mu naredni profesionalni ugovor doneti još veću zaradu, te ne pristaje da udeli vanbračnih partnera u zajedničkoj imovini budu jednaki, shodno PZ. čl.180/2.

Porodično zakonodavstvo ovu složenu i važnu materiju regulisalo je samo u jednom članu (PZ.čl.191) i to vrlo uopštenom normom. Očigledno da to normiranje nije dovoljno.

Ali, i normirani ugovori u Porodičnom zakonodavstvu imaju nedostatke. Jedan od nedostataka ugovora je što može da bude nepovoljan za ekonomski slabiju stranu, koju treba zaštititi. Jedna od zaštita je i obaveza javnog beležnika da prilikom potvrđivanja (solemnizacije) ugovora obavesti ugovarače o pravnom dejstvu vanbračnih ugovora (da se njime isključuje zakonski režim zajedničke imovine).

Za naše pravo kao predlog *de lege ferenda* iznosimo stav da bi ugovore u vanbračnoj zajednici trebalo detaljnije regulisati, s obzirom da su prihvatljivi kao model vanbračnoimovinske regulative, a što predstavlja korak napred u vanbračnom pravu.

Isto tako, sloboda ugovaranja pruža mogućnost vanbračnim partnerima da efikasno regulišu imovinske odnose *in concreto*.

Ugovori donose sigurnost vanbračnim partnerima tako što eliminišu rasprave oko toga „šta je čije“. Time se smanjuju šanse za dugotrajne i vrlo složene sporove između vanbračnih partnera povodom imovinskih odnosa, a što je u interesu oba vanbračna partnera.

Zatim, zaključivanje imovinskih ugovora omogućuje vanbračnim partnerima da se bolje i detaljnije upoznaju sa svojim pravima i obavezama koje proizilaze iz ugovora i da razumeju vanbračnoimovinsku regulativu u koju stupaju.

Ali sloboda ugovaranja u porodičnom pravu trpi određene izuzetke u odnosu na ugovore u drugim granama prava.

Za razliku od ostalih ugovora, ugovorne strane prilikom zaključivanja vanbračnih ugovora povezane su ličnim vezama i interesima (kao što su dužnost uzajamnog poštovanja i pomaganja, postojanje međusobne odanosti, ljubavi, itd.), što ih ograničava da budu potpuno slobodni u kreiranju imovinskih odnosa, jer moraju prilikom ugovaranja da poštuju pomenute lične odnose.

Ugovorni imovinski režim predstavlja bolje rešenje za vanbračne partnere, jer se odredbe ugovora mogu prilagođavati čovekovo svakodnevnicu (praktičnom životu i odnosima koji vladaju na tržištu), koja se brzo menja, za razliku od zakonskog imovinskog režima koji to ne može činiti.

Zato smatramo da je društveno i pravno ispravno, kao i moralno korektno, promovisati vanbračne ugovore kao način regulisanja imovinskih odnosa vanbračnih partnera.

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THE CONTRACTUAL PROPERTY ARRANGEMENT OF UNMARRIED PARTNERS

The subject of this research study is the contractual property arrangement of unmarried partners according to the law of the Republic of Serbia.

The Family Law (2005) allows the possibility for unmarried partners to arrange extramarital relations in a way that suits their interests. Our law has introduced the possibility of concluding extramarital contracts which allow that the regime of common property that had been compulsive until then and could not be changed, now can be excluded, changed or contracted by unmarried partners. The contractual property arrangement has significant legal and social consequences both for the relations of partners in the extramarital community, as well as regarding their relations with society. In this sense, the paper analyses the property relations in the extramarital community, the autonomy of the will in the regulation of property relations, the contractual property arrangement of unmarried partners, the characteristics of extramarital contracts and the social and legal justification of the contractual property arrangement of unmarried partners in regard to our law. The aim of the research was to introduce and explain the regulation of property relations of unmarried partners, from the legal and social aspect. In this article, a legal and sociological method was used when determining the content of the positive law and the effect of legal norms that regulate the property relations of unmarried partners. The understanding of legal science, which refers to this legal institute, is also exposed.

In this article, the contracts of unmarried partners were considered as a model for regulating property relations in an extramarital community in genere.

Keywords: *property relations in an extramarital community, the autonomy of the will in property relations regulation, contractual property arrangement of unmarried partners, characteristics of extramarital contracts*

ISTORIJSKI RAZVOJ PRAVNO-FINANSIJSKIH ELEMENATA PRAVA NA NAKNADU ZARADE ZA VREME PRIVREMENE SPREČENOSTI ZA RAD U REPUBLICI SRBIJI SA OSVRTOM NA AKTUELNO STANJE

Osnovni cilj ovog rada je da prikaže razvoj prava na naknadu zarade za vreme privremene sprečenosti za rad. Ovo pravo ima veliki značaj u sistemu prava iz zdravstvenog osiguranja, a time i socijalnog osiguranja u celini. Na osnovu ovog prava, omogućava se odsustvo sa rada, u slučaju sprečenosti za rad iz medicinskih razloga, a egzistencija osiguranika nije dovedena u pitanje. U našoj zemlji ovo pravo je u normativnom smislu imalo vrlo dinamičan razvoj. Bez obzira što je od 1945. godine u našoj zemlji uvedeno socijalističko društveno uređenje, samo jedan kratak period sredstva za ovo pravo su se finansirala iz budžeta. Od 1950. godine ovo pravo se finansira, na klasičan način, putem doprinosa za obavezno socijalno osiguranje. Osim što je pravo na naknadu zarade imalo vrlo dinamičan razvoj u pogledu normativne delatnosti, ovo pravo se bez obzira na svoju socijalnu komponentu, postepeno redukovalo, kako bi se prilagodilo finansijskim mogućnostima društva, tj. kako bi se obezbedilo njegovo finansiranje u obimu koji je finansijski održiv. Osim što se u ovom radu daje normativni prikaz regulisanja ovog prava, dati su i egzaktni finansijski pokazatelji o neophodnim finansijskim sredstvima za njegovo obezbeđivanje, što jasno prikazuje i značaj ovog prava u pogledu celokupnih troškova sistema zdravstvenog osiguranja, a samim tim udela istih troškova u ukupnim rashodima za zdravstveno osiguranje.

Ključne reči: pravo na naknadu zarade za vreme privremene sprečenosti za rad, zakon, doprinosi, troškovi

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1. Pravni aspekt nastanka prava na naknadu zarade za vreme privremene sprečenosti za rad

Zdravstveno osiguranje je grana socijalnog osiguranja, kojim se osiguranim licima (osiguranicima i članovima porodice osiguranika) obezbeđuje pravo na zdravstvenu zaštitu i ostala prava iz oblasti zdravstvenog osiguranja. Obavezno zdravstveno osiguranje zasniva se na većem broju načela, od kojih posebno izdvajamo:

- a) načelo obaveznosti;
- b) načelo uzajamnosti i solidarnosti;
- c) načelo javnosti;
- d) načelo zaštite prava osiguranih lica i zaštite javnog interesa;
- e) načelo stalnog unapređenja kvaliteta;
- f) načelo ekonomičnosti i
- g) načelo efikasnosti.

U osnovna prava iz obaveznog zdravstvenog osiguranja spadaju:

- a) pravo na zdravstvenu zaštitu;
- b) pravo na naknadu zarade za vreme privremene sprečenosti za rad osiguranika i
- c) pravo na naknadu troškova prevoza u vezi sa korišćenjem zdravstvene zaštite.¹

U ovom radu ćemo opisati razvoj prava na naknadu zarade za vreme privremene sprečenosti za rad osiguranika u našoj zemlji, imajući u vidu da se radi o izuzetno značajnom pravu iz obaveznog zdravstvenog osiguranja.

U savremenom zakonodavstvu gotovo svih država jedno od najznačajnijih mesta zauzimaju pravni propisi koji se odnose na oblast zdravstvene zaštite i zdravstvenog osiguranja ili kraće rečeno: zdravstveno zakonodavstvo. Za veći deo teritorije današnje Republike Srbije koji je do XIX veka bio pod vlašću Osmanskog Carstva, u tom periodu ne možemo govoriti o razvoju zdravstvenog zakonodavstva. Tek sredinom XIX veka sa jačanjem autonomnog položaja Srbije, u okviru Osmanskog Carstva, dolazi do donošenja određenih pravnih propisa koji se odnose na zaštitu zdravlja stanovništva. Ipak, prvi zakon u Srbiji koji se odnosi na zdravstvenu zaštitu je Zakon o ustanovljenju narodnog sanitetskog fonda. Zakon je donet 28. maja 1879. godine, a stupio je na snagu 1. januara 1881. godine. Godine 1878. Kneževina Srbija stekla je punu nezavisnost od Osmanskog Carstva i postala međunarodno priznata država.² Od donošenja Zakona o ustanovljenju narodnog sanitetskog fonda pa sve do danas, zdravstveno

¹ Kostić Miroslava (2016): *Obavezno zdravstveno osiguranje i instrumenti njegovog finansiranja u Republici Srbiji*, Doktorska disertacija, Beograd

² Kosanović Rajko, Anđelski Hristo,(2015): „Osnovni pravci razvoja zdravstvenog osiguranja u Republici Srbiji 1922-2014,” *Zdravstvena zaštita*, Beograd, 3/2015.

osiguranje u Srbiji prošlo je kroz različite etape, kako u organizacionom smislu, tako i u smislu finansiranja, a posebno u pogledu sadržaja i obima prava. U Kraljevini Srba, Hrvata i Slovenaca 14. maja 1922. godine donet je Zakon o osiguranju radnika.³ Zakon je objavljen u „Službenim novinama Kraljevine Srba, Hrvata i Slovenaca“⁴ 30. maja 1922. godine. Ovim zakonom ustanovljene su četiri vrste obaveznog osiguranja i to za slučajeve:

- a) bolesti;
- b) iznemoglosti, starosti i smrti;
- c) nesreće na poslu i
- d) nezaposlenosti.

Osiguranje za slučaj bolesti zapravo predstavlja zdravstveno osiguranje. Osiguranje za slučaj bolesti obuhvatalo je pravo osiguranika na besplatnu lekarsku pomoć dok traje bolest uzastopce za 26 nedelja, s tim da se ista mogla produžiti najduže do 52 nedelje. Osim toga, zakonom je utvrđeno pravo radnika na lekove, kupanja, lekovite vode, potrebne zavoje i pomoćne sprave za lečenje (naočare, štake, potpase, veštačke noge), takođe besplatno za 26 nedelja. Ovde naglašavamo da je isti zakon utvrdio pravo radnika na hranarinu ako je bolesnik nesposoban za rad, a bolest traje duže od tri dana. Pravo na hranarinu pripadalo je od dana nastanka oboljenja u visini 2/3 obezbeđene nadnice dnevno. Doprinos za slučaj bolesti, iznemoglosti, starosti i smrti hranioca padao je na teret radnika i poslodavca i to svakog sa jednom polovinom, a doprinos za slučaj nesreće na poslu samo na teret poslodavaca. Sprovođenje osiguranja zakonom je bilo je povereno Središnjem uredu za osiguranje radnika, čije je sedište bilo u Zagrebu, a postojali su i okružni uredi za osiguranje radnika.

1.1. Uticaj donošenja i sprovođenja zakona koji su definisali razvoj prava na naknadu u drugoj polovini XX veka

Nakon promene društvenog uređenja 1945. godine i prelaska na sistem državnog socijalizma Jugoslavije prisutne su krupne promene i u samom načinu finansiranja socijalnog osiguranja, kao i obima prava iz socijalnog osiguranja i kruga lica na koja se prava iz socijalnog osiguranja odnose. Predsedništvo Antifašističkog veća narodnog oslobođenja Jugoslavije donelo je 02. maja 1945. godine Zakon o sprovođenju socijalnog osiguranja na području Demokratske Federativne Jugoslavije.⁵ U ovom periodu dolazi do centralizacije socijalnog

³ Kostić Miroslava (2016): *Obavezno zdravstveno osiguranje i instrumenti njegovog finansiranja u Republici Srbiji*, Doktorska disertacija, Beograd

⁴ Zakon o osiguranju radnika, *Službene novine Kraljevine SHS*, 117/22

⁵ Zakon o sprovođenju socijalnog osiguranja na području Demokratske Federativne Jugoslavije, *Službeni list DFJ*, 29/45

osiguranja, kako u pogledu vrsta prava koja su obuhvaćena socijanim osiguranjem, tako i u teritorijalno-organizacionom smislu.

Središnji zavod za socijalno osiguranje sa sedištem u Zagrebu je nosilac za sprovođenje osiguranja na području cele države, za slučajeve:

- a) bolesti;
- b) iznemoglosti;
- c) starosti;
- d) nesreće i
- e) nezaposlenosti.

Središnji zavod je vršio utvrđivanje prava iz socijalnog osiguranja preko zemaljskih zavoda za socijalno osiguranje koje su osnivane u glavnim gradovima federalnih jedinica, odnosno republika, a koji su predstavljali organe Središnjeg zavoda. Jedino su utvrđivanje prava za slučaj bolesti, a samim tim i prava na hranarinu, sprovodili zemaljski zavodi za socijalno osiguranje, preko svojih filijala.

Zakon o socijalnom osiguranju radnika, nameštenika i službenika⁶ Narodna skupština Federativne Narodne Republike Jugoslavije donela je 26. jula 1946. godine, a isti se primenjivao od 01. januara 1947. godine. Ovaj zakon je vrlo značajan za razvoj socijalnog osiguranja. Ovim zakonom su regulisane sve grane socijalnog osiguranja, obuhvaćene su sve kategorije zaposlenih lica i znatno proširen obim prava iz socijalnog osiguranja. Ustanovljeno je pravo na državno socijalno osiguranje radnika, nameštenika i službenika, i to:

- a) za slučaj bolesti, trudnoće i porođaja;
- b) nesreće na poslu; iznemoglosti;
- c) starosti i
- d) smrti.

Socijalno osiguranje sprovodila je država preko Državnog zavoda za socijalno osiguranje i njegovih organa organizovanih na teritorijalnoj i profesionalnoj osnovi po načelu da se socijalno osiguranje što više približi samim osiguranicima. Radi ostvarenja ovog načela predloženo je da se služba socijalnog osiguranja, gde god je to moguće, organizuje pri samim preduzećima. Sporove između osiguranika i Državnog zavoda za socijalno osiguranje rešavali su sudovi socijalnog osiguranja, organizovani pri okružnim sudovima. Što se tiče naknade u novcu za slučaj bolesti osiguranika, ovaj zakon je utvrđivao pravo na novčanu naknadu za izgubljenju zaradu (bolesnička hranarina) u visini od 50% do 100% od osnova za novčana davanja, ako je osiguranik usled bolesti nesposoban za rad i ako ta nesposobnost traje duže od 3 dana. Osnov za novčana davanja predstavljala je prosečna zarada koju je osiguranik ostvario u prethodni tri meseca od nastanka bolesti osiguranika. Za pravo na novčanu

⁶ Zakon o socijalnom osiguranju radnika, nameštenika i službenika, *Službeni list FNRJ*, 65/46

potporu za izdržavanje porodice u visini od 50% do 100% od hranarine, ili na novčanu potporu za dnevne sitne troškove do visine jedne petine hranarine, ako ne izdržava porodicu i to za sve vreme dok se osiguranik nalazi na bolničkom, sanatorijskom, banjskom ili klimatskom lečenju.

Zakonom o socijalnom osiguranju radnika i službenika i njihovih porodica⁷, donetim 21. januara 1950. godine, dovršava se proces formiranja državnog socijalnog osiguranja. Država socijalnim osiguranjem obezbeđuje radnicima i službenicima i njihovim porodicama određena prava za slučaj:

- a) bolesti;
- b) gubitka sposobnosti za rad;
- c) starosti; smrti i
- d) druga prava utvrđena ovim zakonom.

Sticanje i obim pojedinih prava zavisilo je, po pravilu, od trajanja radnog odnosa i visine plate. Osiguranik koji je usled bolesti, odnosno bolovanja, privremeno nesposoban za rad imao je za vreme bolesti, odnosno bolovanja, pravo na novčanu naknadu umesto redovne plate. Osiguraniku koji je neposredno pre početka nesposobnosti za rad bio u radnom odnosu neprekidno najmanje šest meseci ili s prekidima ukupno osamnaest meseci za poslednje dve godine, pripadala je za vreme lečenja, odnosno bolovanja, naknada u iznosu od 100% redovne plate. Osiguraniku koji nije ostvario odgovarajuće trajanje staža osiguranja pripadala je za vreme lečenja, odnosno bolovanja, naknada u visini od 50% redovne plate ako je ostvario staž osiguranja do tri meseca, a u visini od 75% ako je ostvario staž osiguranja više od tri meseca, a manje od šest meseci. Pravo na materijalno obezbeđenje pripadalo je bez obzira na dužinu staža osiguranja, osiguraniku koji je postao privremeno nesposoban za rad usled posledica nesreće na poslu, ali i osiguraniku – učeniku u privredi.

Donošenjem Zakona o zdravstvenom osiguranju radnika i službenika 1954. godine⁸, Zakona o penzijskom osiguranju⁹ 1957. godine i Zakona o invalidskom osiguranju¹⁰ 1958. godine, dolazi do materijalno-pravnog razgraničenja socijalnog osiguranja. Zakon o zdravstvenom osiguranju radnika i službenika utvrđivao je pravo na naknadu umesto plate za vreme privremene nesposobnosti za rad usled bolesti i u drugim slučajevima određenim ovim zakonom. Naknada umesto plate iznosila je 80% od osnova za naknadu za prvih sedam dana, a 90% od osnova za naknadu posle sedam dana – za osiguranike koji su osigurani najmanje šest meseci neprekidno, ili dvanaest meseci sa prekidima za poslednje dve godine neposredno pre početka prava na naknadu; 60% od osnova za naknadu za prvih

⁷ Zakon o socijalnom osiguranju radnika i službenika i njihovih porodica, *Službeni list FNRJ*, 10/50, 13/50, 4/51.11/51 i 6/51

⁸ Zakon o zdravstvenom osiguranju radnika i službenika, *Službeni list FNRJ*, 51/54

⁹ Zakon o penzijskom osiguranju, *Službeni list FNRJ*, 51/57

¹⁰ Zakon o invalidskom osiguranju, *Službeni list FNRJ*, 49/58

sedam dana, a 70% od osnova za naknadu posle sedam dana – za osiguranike koji pre početka prava na naknadu nisu osigurani šest meseci neprekidno ili dvanaest meseci sa prekidima za poslednje dve godine. Osnov za naknadu zarade predstavljala je prosečna osiguranikova zarada u prethodna tri meseca.

Zakon o zdravstvenom osiguranju¹¹ od 30. maja 1962. godine stupio je na snagu osmog dana po objavljivanju, s tim da su dopune ovog zakona vršene u decembru iste godine. Donošenjem Zakona o izmenama i dopunama Zakona o zdravstvenom osiguranju 12. maja 1965. Godine, naziv zakona se menja i glasi: Osnovni zakon o zdravstvenom osiguranju. Izmene i dopune ovog zakona vršene su naredne 1966. godine dva puta i 1967. godine.

Zdravstvenim osiguranjem u slučajevima i pod uslovima određenim Osnovnim zakonom o zdravstvenom osiguranju osiguranicima su obezbeđivana sledeća prava:

- 1) osiguranicima:
 - a) zdravstvena zaštita;
 - b) naknada ličnog dohotka odnosno plate (u daljem tekstu: naknada ličnog dohotka);
 - c) naknada putnih troškova u vezi sa korišćenjem zdravstvene zaštite.

Takođe, zdravstvenim osiguranjem u slučajevima i pod uslovima određenim Osnovnim zakonom o zdravstvenom osiguranju članovima porodica osiguranika su obezbeđivana sledeća prava:

- a) zdravstvena zaštita;
- b) naknada putnih troškova u vezi sa korišćenjem zdravstvene zaštite.

U okviru zdravstvenog osiguranja osiguranim licima obezbeđivana su pod određenim uslovima i novčana primanja za slučaj rođenja deteta i za slučaj smrti osiguranog lica. Naknada ličnog dohotka prema odredbama ovog zakona iznosila je 80% od osnova za naknadu za prvih sedam dana, 90% od osnova od osmog do šezdesetog dana i 100% od osnova od šezdeset i prvog dana izostanka sa posla osiguraniku koji je pre nastupanja slučaja koji daje pravo na naknadu ličnog dohotka ispunjavao uslov prethodnog osiguranja odnosno 60% od osnova za naknadu za prvih sedam dana, 70% od osnova od osmog do šezdesetog dana i 100% od osnova od šezdeset i prvog dana izostanka sa posla osiguraniku koji nije ispunjavao uslov prethodnog osiguranja. Naknada ličnog dohotka u visini 100% od osnova za naknadu pripada od prvog dana izostanka sa posla osiguranicima čija je privremena nesposobnost za rad prouzrokovana nesrećom na poslu ili profesionalnim oboljenjem, učenicima u privredi i učenicima stručnih škola sa praktičnom obukom i osiguranicima određenim za pratioce bolesnika. Osnov za naknadu zarade predstavljala je prosečna mesečna zarada koju je osiguranik ostvario u prethodna tri meseca. Sredstva za obezbeđenje prava iz zdravstvenog

¹¹ Zakon o zdravstvenom osiguranju, *Službeni list FNRJ*, 22/62 i 53/62

osiguranja ostvarivana su doprinosima od kojih su obrazovani fondovi zdravstvenog osiguranja kod komunalnih zavoda za socijalno osiguranje.

Opšti zakon o zdravstvenom osiguranju i obaveznim vidovima zdravstvene zaštite stanovništva¹² usvojila je Savezna skupština na sednici Saveznog veća 24. aprila 1969. godine i na sednici Socijalno-zdravstvenog veća, 25. aprila 1969. godine i isti je objavljen u „Službenom listu SFRJ“ 08. maja 1969. godine. Opšti zakon o zdravstvenom osiguranju i obaveznim vidovima zdravstvene zaštite stanovništva je poslednji zakon iz oblasti zdravstvene zaštite i zdravstvenog osiguranja koji je donet na saveznom nivou. Prava iz zdravstvenog osiguranja predviđena Opštim zakonom o zdravstvenom osiguranju i obaveznim vidovima zdravstvene zaštite stanovništva koja osiguranici za sebe i članove svojih porodica u zajednicama zdravstvenog osiguranja obezbeđuju su:

- a) zdravstvena zaštita koju samostalno utvrđuju u okviru zajednice zdravstvenog osiguranja;
- b) zdravstvena zaštita koja se na osnovu zakona obavezno obezbeđuje i sprovođi putem zdravstvenog osiguranja;
- c) novčane naknade i pomoći koje osiguranim licima pripadaju na osnovu ovog zakona odnosno koje zajednica zdravstvenog osiguranja ustanovi i
- d) druga prava iz zdravstvenog osiguranja koja samostalno utvrđuju zajednice zdravstvenog osiguranja.

Prava iz osiguranja za slučaj nesreće na poslu i oboljenja od profesionalnih bolesti obezbeđivala su se osiguranicima nezavisno od dužine prethodnog trajanja zdravstvenog osiguranja. Osnov za naknadu ličnog dohotka za vreme privremene sprečenosti za rad čini prosek ličnog dohotka koji je radnik ostvario u prethodnoj godini, pre godine u kojoj je nastupio slučaj po kome se stiče pravo na naknadu. Visinu naknade ličnog dohotka koja se isplaćivala na teret sredstava zajednice zdravstvenog osiguranja, odnosno na teret sredstava privatnog poslodavca, utvrđivala je zajednica zdravstvenog osiguranja, a visinu naknade koju je isplaćivala radna organizacija utvrđivala je sama radna organizacija. Naknada ličnog dohotka određivana je najmanje u visini od 60% od osnova za naknadu, s tim da nije mogla biti niža od iznosa minimalnog ličnog dohotka utvrđenog važećim propisima. Visina naknade iznosila je 100% od osnova za naknadu za vreme privremene sprečenosti za rad prouzrokovane nesrećom na poslu ili oboljenjem od profesionalne bolesti. Zdravstveno osiguranje obezbeđivali su osiguranici po načelima uzajamnosti i solidarnosti u okviru samoupravnih zajednica zdravstvenog osiguranja. Sredstva za ostvarivanje zdravstvene zaštite i drugih prava iz zdravstvenog osiguranja obezbeđivna su doprinosima osiguranika i zakonom utvrđenih drugih obveznika plaćanja doprinosa, učešćem društveno-političkih zajednica i drugim prihodima.

¹² Opšti zakon o zdravstvenom osiguranju i obaveznim vidovima zdravstvene zaštite stanovništva, *Službeni list SFRJ*, 20/69

Zakon o zdravstvenom osiguranju i obaveznim vidovima zdravstvene zaštite stanovništva¹³ Narodna Skupština Socijalističke Republike Srbije donela je 10. jula 1970. godine. Ovaj zakon je objavljen u „Službenom glasniku SRS“ 18. jula 1970. godine. Zakon je stupio na snagu od narednog dana od dana objavljivanja, a primenjivao se od 01. jula 1971. godine. Naknada ličnog dohotka prema odredbama ovog zakona pripadala je osiguraniku od prvog dana sprečenosti za rad i za sve vreme trajanja te sprečenosti. Naknadu ličnog dohotka za prvih 30 dana sprečenosti za rad isplaćivala je radnicima organizacija, građansko pravno lice, odnosno privatni poslodavac na teret svojih sredstava. Visinu naknade ličnog dohotka koja se isplaćivala na teret sredstava zajednice zdravstvenog osiguranja, odnosno na teret sredstava građanskopravnog lica, odnosno privatnog poslodavca, utvrđivala je zajednica, a visinu naknade koja se isplaćivala na teret sredstava organizacije utvrđivala je organizacija. Naknada ličnog dohotka određivala se najmanje u visini od 60% od osnova za naknadu, s tim da nije mogla biti niža od iznosa minimalnog ličnog dohotka utvrđenog važećim propisima. Visina naknade iznosila je 100% od osnova za naknadu za vreme privremene sprečenosti za rad prouzrokovane povredom na radu ili oboljenjem od profesionalnih bolesti. Osnov za naknadu zarade predstavljala je prosečna mesečna zarada koju je osiguranik ostvario u prethodnih godinu dana. Zakon o zdravstvenoj zaštiti¹⁴ donet je 13. jula 1979. godine. Zakon je objavljen u „Službenom glasniku SRS“ od 21. jula 1979. godine, a stupio je na snagu osmog dana od dana objavljivanja. Donošenjem ovog zakona materija zdravstvene zaštite i zdravstvenog osiguranja je normativno objedinjena. U sistemu zdravstvenog osiguranja centralno mesto imale su samoupravne interesne zajednice zdravstvene zaštite. Za teritoriju više opština, odnosno za teritoriju grada Beograda to su međuopštinske zajednice. Za teritoriju Republike to je Republička zajednica. Naknada ličnog dohotka za vreme privremene sprečenosti za rad određivala se najmanje u visini od 70% od osnova za naknadu, i nije mogla biti manja od iznosa 60% od prosečnog mesečnog čistog ličnog dohotka po radniku u privredi opštine, odnosno Grada Beograda obračunatog u prethodnom periodičnom obračunu. Naknada ličnog dohotka za vreme privremene sprečenosti za rad prouzrokovane povredom na radu, profesionalnom bolešću, kao i davanjem tkiva i organa, obezbeđivala se u visini od 100% od osnova za naknadu ličnog dohotka. Osnov za utvrđivanje naknade ličnog dohotka za vreme privremene sprečenosti za rad određivao se najmanje u iznosu prosečnog mesečnog ličnog dohotka koji je radnik ostvario u kalendarskom polugodištu koje prethodi vremenu u kojem nastupa slučaj po kome se sticalo pravo na naknadu. Naknadu ličnog dohotka za prvih 30 dana sprečenosti za rad isplaćivala je organizacija, odnosno poslodavac iz svojih

¹³ Zakon o zdravstvenom osiguranju i obaveznim vidovima zdravstvene zaštite stanovništva, *Službeni glasnik SRS*, 27/70

¹⁴ Zakon o zdravstvenoj zaštiti, *Službeni glasnik SRS*, 30/79, 59/82, 18/83, 22/84, 50/84, 51/85, 49/86, 22/87, 35/87 – ispravka, 8/88 i 20/89

sredstava. Samoupravne interesne zajednice su prestale da postoje 01. aprila 1990. godine.

1.2. Razvoj prava na naknadu u procesu ekonomske i društvene tranzicije

Raskidom sa samoupravnim socijalizmom, odnosno donošenjem Ustava Republike Srbije iz 1990. Godine, menjaju se i propisi iz oblasti zdravstvene zaštite i zdravstvenog osiguranja, kako bi se uskladili sa novim Ustavom i novim društveno-ekonomskim uređenjem. Zakon o zdravstvenoj zaštiti¹⁵ iz 1990. godine uređivao je materiju zdravstvene zaštite i materiju zdravstvenog osiguranja. Ovaj zakon donet je 25. januara 1990. godine. U Srbiji od 01. aprila 1990. godine više ne postoje samoupravne interesne zajednice zdravstvene zaštite. Umesto samoupravnih interesnih zajednica osnovani su fondovi i to za područje šire od opštinskog. Fondovi imaju jednostavniju organizaciju od samoupravnih interesnih zajednica i manju stručnu službu, što omogućava efikasnije odlučivanje. Na teritoriji Srbije bilo je 18 opštinskih fondova zdravstvene zaštite i zdravstvenog osiguranja, s tim da je svaki Fond obuhvatao teritoriju više opština. Jedan Gradski fond zdravstvene zaštite i zdravstvenog osiguranja oformljen je za teritoriju Grada Beograda. Obim i sadržaj zdravstvene zaštite kao i način njenog sprovođenja utvrđivao je Republički fond. Naknada ličnog dohotka za vreme privremene sprečenosti za rad određivala se najmanje u visini od 70% od osnova za naknadu i nije mogla biti manja od zajemčenog ličnog dohotka utvrđenog po propisima o radnim odnosima. Naknada ličnog dohotka za vreme sprečenosti za rad prouzrokovane povredom na radu, profesionalnom bolešću, kao i zbog održavanja trudnoće i davanja tkiva i organa, obezbeđivala se u visini od 100% od osnova za naknadu. Osnov za utvrđivanje naknade ličnog dohotka za vreme privremene sprečenosti za rad predstavljao je lični dohodak u mesecu koji prethodi mesecu u kome je nastupio slučaj po kome se stiće pravo na naknadu. Naknadu ličnog dohotka za prvih 30 dana sprečenosti za rad isplaćuje organizacija, odnosno poslodavac iz svojih sredstava. Sredstva za zdravstvenu zaštitu i druga prava iz zdravstvenog osiguranja obezbeđivala su se doprinosom za zdravstveno osiguranje iz ličnih dohodaka radnika, odnosno iz odgovarajućih prihoda drugih radnih ljudi i građana i iz dohotka preduzeća i drugih organizacija i zajednica koje utvrđuju i raspoređuju dohodak kao i iz budžeta društveno-političke zajednice.

Od 1992. godine materija iz oblasti zdravstvenog osiguranja ponovo se reguliše posebnim zakonom. Zakon o zdravstvenom osiguranju donet je 02. aprila 1992. godine, objavljen je 04. aprila 1992. godine i stupio je na snagu osmog dana od dana objavljivanja u „Službenom glasniku RS“. Zdravstveno osiguranje na teritoriji čitave Republike sprovodilo se posredstvom jedne organizacije – Republičkog zavoda za zdravstveno osiguranje i 30 njegovih

¹⁵ Zakon o zdravstvenoj zaštiti, *Službeni glasnik RS*, 30/79

filijala (sa ispostavama) koje nisu imale svojstvo pravnog lica ni organe. Naknada zarade za vreme privremene sprečenosti za rad koja se obezbeđivala iz sredstava Zavoda iznosila je 65% od osnova za naknadu i nije mogla biti niža od minimalne zarade utvrđene u skladu sa zakonom. Naknada zarade koja se obezbeđivala iz sredstava Zavoda iznosila je 100% od osnova za naknadu i nije mogla biti niža od minimalne zarade utvrđene u skladu sa zakonom, u slučajevima kada je uzrok sprečenosti za rad bio povreda na radu i profesionalna bolest, dobrovoljno davanje tkiva i organa i održavanje trudnoće. Visina naknade zarade koju je obezbeđivao poslodavac iz svojih sredstava utvrđivala se u skladu sa propisima o radu i Zakonom o zdravstvenom osiguranju i takođe iznosila je 100% za slučajeve povreda na radu i profesionalna bolest, dobrovoljno davanje tkiva i organa i održavanje trudnoće. Osnov za utvrđivanje naknade zarade predstavljala je zarada utvrđena u skladu sa zakonom, opštim aktom ili ugovorom o radu, koju bi osiguranik ostvario u mesecu za koji se isplaćuje naknada zarade da nije nastupila privremena sprečenost za rad, kao i naknada zarade zbog rada sa skraćenim radnim vremenom, odnosno naknada zarade zbog rada na drugom odgovarajućem poslu, u skladu sa propisima o penzijskom i invalidskom osiguranju. Naknadu zarade za slučajeve privremene sprečenosti za rad za prvih 30 dana sprečenosti za rad obezbeđuje poslodavac iz svojih sredstava, a posle toga dana Zavod.

Važećim Zakonom o zdravstvenoj zaštiti¹⁶ iz 2005. godine dolazi do decentralizacije u sistemu zdravstvene zaštite, a Zakonom o zdravstvenom osiguranju¹⁷, koji je donet istovremeno sa Zakonom o zdravstvenoj zaštiti, zadržava se centralizacija zdravstvenog osiguranja. I jedan i drugi zakon stupili su na snagu 10. decembra 2005.godine. Oba zakona su u više navrata menjana i dopunjavana. U Republici Srbiji, u skladu sa Zakonom o zdravstvenom osiguranju uvedeni su sledeći oblici zdravstvenog osiguranja:

- a) obavezno zdravstveno osiguranje odnosno zdravstveno osiguranje kojim se zaposlenima i drugim građanima obuhvaćenim obaveznim zdravstvenim osiguranjem na načelima solidarnosti i uzajamnosti kao i drugim načelima utvrđenim zakonom obezbeđuju pravo na zdravstvenu zaštitu i pravo na novčane naknade;
- b) dobrovoljno zdravstveno osiguranje odnosno osiguranje od nastanka rizika plaćanja učešća u troškovima zdravstvene zaštite, osiguranje građana koji nisu obavezno osigurani odnosno koji se nisu uključili u obavezno zdravstveno osiguranje kao i osiguranje na veći obim i standard i druge vrste prava iz zdravstvenog osiguranja).

¹⁶ Zakon o zdravstvenom zaštiti, *Službeni glasnik RS*, 107/05, 109/09 – ispravka, 57/11, 110/12 – US, 119/12, 99/14 i 123/14

¹⁷ Zakon o zdravstvenom osiguranju, *Službeni glasnik RS*, 107/05, 72/09 – dr.zakon, 88/10, 99/10, 57/11, 119/12, 45/13 – dr.zakon i 93/14.

Vrste dobrovoljnog zdravstvenog osiguranja su paralelno zdravstveno osiguranje dodatno zdravstveno osiguranje i privatno zdravstveno osiguranje. Obavezno zdravstveno osiguranje obezbeđuje se i sprovodi u Republičkom fondu za zdravstveno osiguranje. Zakonom o izmenama i dopunama Zakona o zdravstvenom osiguranju, iz avgusta 2011. godine („Službeni glasnik RS“, broj 57/11) Republički zavod za zdravstveno osiguranje promenio je naziv u Republički fond za zdravstveno osiguranje. Određeni poslovi obaveznog zdravstvenog osiguranja sprovode se i u filijalama Republičkog fonda i njihovim ispostavama i u Pokrajinskom fondu za zdravstveno osiguranje, koji nemaju svojstvo pravnog lica. Dobrovoljno zdravstveno osiguranje mogu da sprovode pravna lica koja obavljaju delatnost osiguranja u skladu sa zakonom, kao i Republički fond za zdravstveno osiguranje. Sredstva za ostvarivanje prava iz obaveznog zdravstvenog osiguranja obezbeđuju se uplatom doprinosa za obavezno zdravstveno osiguranje, kao i iz drugih izvora u skladu sa zakonom. Osnov za obračun naknade zarade za vreme privremene sprečenosti za rad osiguranika kao jednog od prava iz oblasti zdravstvenog osiguranja koju isplaćuje poslodavac iz svojih sredstava utvrđuje se u skladu sa propisima o radu. Za obračun naknade zarade koja se isplaćuje iz sredstava obaveznog zdravstvenog osiguranja, osnov čini prosečna zarada koju je osiguranik ostvario u prethodna tri meseca pre meseca u kojem je nastupila privremena sprečenost za rad. Zaradu koja se isplaćuje iz sredstava obaveznog zdravstvenog osiguranja čini zarada za obavljeni rad i vreme provedeno na radu, utvrđena u skladu sa propisima o radu i to osnovna zarada zaposlenog i uvećana zarada po osnovu vremena provedenog na radu za svaku punu godinu rada ostvarenu u radnom odnosu. Visina naknade zarade koju obezbeđuje poslodavac za prvih 30 dana sprečenosti za rad osiguranika iz svojih sredstava utvrđuju se u skladu sa propisima o radu i zakonom. Visina naknada zarade koja se obezbeđuje iz sredstava obaveznog zdravstvenog osiguranja kao i iz sredstava poslodavaca iznosi 65% od osnova za naknadu zarade. Visina naknade zarade koja se obezbeđuje iz sredstava obaveznog zdravstvenog osiguranja, kao i iz sredstava poslodavca u slučajevima profesionalne bolesti ili povrede na radu kao i dobrovoljnog davanja organa i tkiva, izuzev dobrovoljnog davanja krvi, iznosi 100% od osnova za naknadu zarade. Visina naknade zarade koja se obezbeđuje iz sredstava obaveznog zdravstvenog osiguranja ne može biti niža od minimalne zarade utvrđene u skladu sa propisima o radu za mesec za koji se vrši obračun naknade zarade, niti viša od 65% odnosno 100% najvišeg osnova za naknadu zarade utvrđenog u skladu sa ovim zakonom.

2. Finansijski aspekt naknade za vreme privremene sprečenosti za rad kroz osvrt na aktuelno stanje i učešće u ukupnim rashodima za socijalno osiguranje

2.1. Aktuelna izdvajanja za nakanadu za privremenu sprečenost za rad

Kao primer možemo analizirati podatke u naredne dve tabele u kojima je predstavljen deo finansijskog plana Republičkog fonda za zdravstveno osiguranje, a koji se odnosi na rashode ove ustanove socijalnog osiguranja. Od ukupnih sredstava koja su predviđena planom za 2016. godinu, a u delu finansiranja prava iz socijalnog osiguranja u iznosu od 215.008.396.000 dinara, deo od 9.694.670.000 dinara se odnosi na naknadu zarade osiguranicima usled privremene nesposobnosti za rad. Izdvajanja po ovom osnovu iznose 4,5% od ukupnih izdvajanja za ostvarivanje prava koje osiguranici imaju po osnovu zakona. Iako procentualo ne predstavlja visok nivo sredstava, u apsolutnom iznosu deset milijardi dinara čini značajanu stavku u sistemu obaveznog zdravstvenog osiguranja.

Tabela 1. Deo finansijskog plana Republičkog fonda za zdravstveno osiguranje za 2016. godinu u delu koji se odnosi na rashode¹⁸

Ekonomska klasifikacija	Rashodi i izdaci	Iznos
1	2	3
400000	Tekući rashodi	219.396.800
470000	Prava iz socijalnog osiguranja (organizacije obaveznog socijalnog osiguranja)	215.008.396
471100	Prava iz socijalnog osiguranja koja se isplaćuju neposredno osiguranicima	10.771.434
471110	Naknade zarada osiguranicima usled privremene nesposobnosti za rad	9.694.670

Izvor: Republički fond za zdravstveno osiguranje,
Finansijski izveštaji – Finansijski plan za 2016.godinu

¹⁸ Republički fond za zdravstveno osiguranje, *Izveštaj o privremenoj sprečenosti za rad za period 01.01.2016. – 30.06.2016. godine*, <http://www.rfzo.rs/index.php/arhiva-vesti/905-sprecenost-za-rad>, 27. 04. 2017.

Tabela 2. Deo Finansijskog plana Republičkog fonda za zdravstveno osiguranje za 2017. godinu¹⁹ u delu koji se odnosi na rashode

Ekonomska klasifikacija	Rashodi i izdaci	Iznos
1	2	3
400000	Tekući rashodi	228.380.000
470000	Socijalno osiguranje i socijalna zaštita	223.808.803
471100	Prava iz socijalnog osiguranja koja se isplaćuju neposredno osiguranicima	11.440.000
471110	Naknade zarada osiguranicima usled privremene nesposobnosti za rad	10.340.000

Izvor: „Službeni glasnik Republike Srbije“ broj 99 od 12.12.2016. godine

U tabeli broj 2 (deo finansijskog plana Republičkog fonda za zdravstveno osiguranje za 2017. godinu u delu koji se odnosi na rashode) se vidi da su sredstva koja su za 2017. godinu planirana za naknadu osiguranicima usled privremene nesposobnosti za rad na nivou od 10.340.000.000 dinara, što je za 6,24% više u odnosu na plan iz 2016. godine. Izdvajanja po ovom osnovu u odnosu na ukupna izdvajanja za socijalno osiguranje i socijalnu zaštitu ostala su na približno istom nivou kao i prošle godine i čine 4,62% ukupnih rashoda.

U redovnom izveštaju o privremenoj sprečenosti za rad koju sačinjava i objavljuje Republički fond za zdravstveno osiguranje između ostalog je navedeno:

Na ime naknade zarade Republički fond za zdravstveno osiguranje osiguranim licima privremeno sprečenim za rad duže od 30 dana, u periodu od 01.01.2016. do 30.06.2016. godine, isplatio je sredstva u iznosu od 5.142.943.455,56 dinara, što je za 10,53%, odnosno 489.970.141,18 dinara više nego u istom periodu prethodne godine. Najveći broj osiguranih lica u prvoj polovini 2016. godine bio je sprečen za rad iz razloga bolesti ili povrede van rada 59,67%, zatim slede bolesti ili komplikacije u vezi sa održavanjem trudnoće 33,66%, profesionalne bolesti ili povrede na radu 5,3%, nega bolesnog člana uže porodice 0,88% i ostali razlozi sprečenosti za rad (propisane mere obavezne izolacije kao kliconoše ili zbog pojave zaraznih bolesti u njegovoj okolini; zbog dobrovoljnog davanja organa i tkiva, izuzev dobrovoljnog davanja krvi; sprečenost za rad pratioca bolesnog osiguranog lica upućenog na lečenje ili lekarski pregled u drugo mesto, odnosno za vreme boravka u svojstvu pratioca u stacionarnoj zdravstvenoj ustanovi) 2,99%. Poredeći privremenu sprečenost za rad u prvoj polovini 2015. godine sa istim periodom 2016. godine, zaključuje se da se broj slučajeva povećao, i to za dijagnoze iz grupe tumori za 7,84%.

¹⁹ Finansijski plan Republičkog fonda za zdravstveno osiguranje za 2017. godinu, Službeni glasnik RS, 99/2016

Iz ovog izveštaja možemo zaključiti, a poredeći ga pre svega sa finansijskim planom za 2016. godinu, koji smo analizirali, da je realizacija i isplata ove naknade veća od planskih veličina i da pokazuje trend rasta u odnosu na plan. Takođe se vidi da raste broj slučajeva samih sprečenosti za rad po osiguranim licima, što ukazuje da se u budućem periodu takođe može očekivati dalji rast izdavanja za ovo pravo osiguranika u Srbiji.

Za analizu i razmatranje značaja izdvajanja sredstava za naknade za vreme privremene sprečenosti za rad važno je sagledati finansijski aspekt navedene naknade u odnosu na ukupna izdvajanja države. Najveći deo izdvajanja za ostvarivanja osiguranih lica, pa pored ostalog i za privremenu nesposobnost za rad, realizuje se preko organizacija obaveznog socijalnog osiguranja (OOSO). Ostatak predstavljaju programi socijalne pomoći koji se finansiraju iz budžeta Republike i sa lokalnog nivoa vlasti. Penzije predstavljaju najveći rashod države i predstavljaju čak jednu četvrtinu izdvajanja iz budžeta države.

Na osnovu analize realizacije budžeta Republike Srbije, a koju je sačinila Parlamentarna budžetska kancelarija²⁰ došlo se do sledećih podataka:

- a) naknade za bolovanja su iznosile 10,3 milijardi dinara, što je više nego u prethodnoj godini;
- b) socijalna pomoć (finansira se najvećim delom iz budžeta Republike, a manjim delom sa lokalnog nivoa vlasti) je iznosila 156,9 milijardi dinara i ovi rashodi su niži nego u 2015;
- c) najznačajniji rashodi organizacija obaveznog socijalnog osiguranja odnose se na ostvarivanje prava iz obaveznog socijalnog osiguranja za koje su pojedinačne organizacije nadležne:

- Republički fond penzijskog i invalidskog osiguranja pre svega isplaćuje penzije (84% javnih rashoda Republičkog fonda penzijskog i invalidskog osiguranja);

- Republički fond za zdravstveno osiguranja finansira ostvarivanje prava iz obaveznog zdravstvenog osiguranja. Sredstva za ove namene se troše na rashode za zaposlene i nabavku robe i usluga (obe stavke imaju učešće od po oko 47% u javnim rashodima Republičkog fonda za zdravstveno osiguranja) i naknade za bolovanje (učešće od 5%) ;

- Naknade za slučaj privremene sprečenosti za rad isplaćuje Republički fond za zdravstveno osiguranje. U toku 2016. godine rashodi za ove namene su iznosili 10,3 milijardi dinara, što je za 535 miliona dinara (5,5%) više nego u 2015. godini.

Takođe i iz ovih podataka možemo zaključiti da je u 2016. godini isplata naknade premašila iznos koji je bio planiran finansijskim planom Republičkog fonda za zdravstveno osiguranje, kao i nivo sredstava koja su isplaćena u 2015. godini.

²⁰ Parlamentarna budžetska kancelarija (2017): *Analiza izvršenja budžeta januar-decembar 2016. godine*, Beograd, (23.02.2017.)

Kako bi se u dovoljnoj meri obezbedila sredstva za finansiranje celokupnog obaveznog zdravstvenog osiguranja, a samim tim i sredstva za obezbeđivanje naknade zarade za slučaj privremene sprečenosti za rad, neophodna je bolja kontrola propisa o radu i propisa kojima je uređena naplata javnih prihoda. Pod javnim prihodima u ovom slučaju podrazumevamo ne samo fiskalne prihode, nego i doprinose za obavezno socijalno osiguranje kao parafiskalitete. Da bi sistem obaveznog zdravstvenog osiguranja u okviru kog je pravo na naknadu zarade bio finansijski održiv, potrebno je koliko je moguće smanjiti administrativne troškove isplate i kašnjavati u skladu sa pravnim propisima izbegavanje plaćanja doprinosa. Ovde izuzetan značaj ima usavršavanje informacionog sistema posebno kroz uvođenje Centralnog registra osiguranika i korisnika. Posebno treba istaći i značaj povezivanja Poreske uprave i organizacija nadležnih za obavezno socijalno osiguranje, tj. Republikog fonda za zdravstveno osiguranje i Republičkog fonda za penzijsko i invalidsko osiguranje, kao i Nacionalne službe za zapošljavanje. Sa uvođenjem veće discipline u izmirivanju doprinosa za obavezno socijalno osiguranje možemo zaključiti da je sadašnji obim i visina prava za slučaj privremene sprečenosti za rad finansijski održiv. Takođe sadašnji obim i visina prava za slučaj privremene sprečenosti za rad obezbeđuje relativno prihvatljivu visinu naknade, ali u svojoj visini od 65% od zarade osiguranika za slučaj bolesti i povrede van rada ipak ne stimuliše korišćenje ovog prava kada isto nije u skladu sa medicinsko-doktrinarnim standardima, što je i krajnji cilj postojanja ovog prava.

3. Zaključak

Izdvajanja za naknade po osnovu privremene nesposobnosti za rad predstavljaju jedno od osnovnih prava iz socijalnog osiguranja i kao takva sastavni su deo finansijskog plana ustanova socijalnog osiguranja. Posmatrujući razvoj akata koji su definisali pravo na naknadu po ovom osnovu, da se zaključiti da je postojala tendencija zakonodavca da se ova izdvajanja vremenom smanjuju. Takva tendencija je izvedena pre svega iz činjenice da je obuhvat sredstava za finansiranje ove namene značajan.

Kako smo mogli zaključiti iz ranijeg izlaganja prava iz zdravstvenog osiguranja, po osnovu privremene sprečenosti za rad, posebno u zakonodavstvu nakon 1945. Godine, prošla su kroz vrlo dinamičan razvoj. Uspostavom socijalističkog društvenog uređenja praktično je i u normativnom i u finansijskom smislu „preslikan“ sistem finansiranja ovog prava kroz izdvajanje iz budžeta države. U ovom načinu finansiranja ne postoji direktno opterećenje zarade osiguranika ili poslodavca kroz obavezu uplate doprinosa. Država jednostavno iz budžeta opredeljuje sredstva za ove namene što je pozitivna strana ovog modela obezbeđivanja sredstava za naknadu zarade za vreme privremene sprečenosti za

rad. Međutim, negativna strana je što se gubi bilo kakva veza između obaveze uplaćivanja sredstava putem doprinosa i ostvarivanja prava iz zdravstvenog osiguranja. Na ovaj način svest o značaju i troškovima prava iz obaveznog osiguranja gubi na značaju. Zbog ovoga je moguće da se sredstva opredeljena za namene zdravstvenog osiguranja, pa time i novčane naknade za vreme privremene sprečenosti za rad, neracionalno koriste. Drugim rečima, pravo na naknadu zbog privremene sprečenosti za rad, a time i odsustvo zaposlenog sa rada, utvrđuje se čak i kad u pogledu medicinsko-doktrinarnih standarda ne postoje objektivni uslovi za isto.

Raskidom sa sovjetskim tipom socijalističkog društvenog uređenja Jugoslavija ponovo uvodi sistem obaveznih doprinosa kao sredstava za ostvarivanje svih prava iz obaveznog socijalnog osiguranja. Pozitivna strana ovakvog sistema je povećanje svesti o potrebi racionalnog korišćenja sredstava za ove namene. S druge strane, potrebno je da se prilikom donošenja pravnih propisa kojima se regulišu prava iz obaveznog socijalnog osiguranja bude posebno obazriv kako se doprinosi za obavezno socijalno osiguranje ne bi shvatili kako porez.

Obezbeđivanjem adekvatnih prava po osnovu doprinosa, a uzimajući u obzir i načelo solidarnosti, dolazi se do manjeg animoziteta obveznika uplate doprinosa prema ovim davanjima. Međutim, davanja se uvek moraju prilagoditi materijalnoj osnovi društva. Kako smo mogli videti, pravo na naknadu zarade za vreme privremene sprečenosti za rad od 1945. godine do sada, u pogledu procenta od osnovice za utvrđivanje visine ovog prava, značajno se smanjilo. Pravo na naknadu zarade zbog privremene sprečenosti za rad, kada ista i nije nastala zbog povrede na radu ili profesionalne bolesti, nego zbog povrede van rada ili bolesti, iznosilo je i do 100% od zarade osiguranika. Kod osiguranika koji su imali prethodni staž osiguranja u trajanju od nekoliko meseci, ovaj procenat nikako nije mogao biti manji od 80%. Iako se ovde radi o vrlo izdašnom sistemu obezbeđivanja prava iz obaveznog socijalnog tj. zdravstvenog osiguranja, jasno je da ovaj procenat davanja može dovesti do svojevrsne stimulacije za korišćenje ovog prava i kada to u skladu sa medicinsko-doktrinarnim standardima nije neophodno. Zbog toga se pribeglo smanjivanju procenta od zarade osiguranika u kom se obezbeđuje pravo na naknadu zarade zbog privremene sprečenosti za rad zbog bolesti ili povrede na 65%. Ovaj procenat je utvrđen kao svojevrsan balans između zadovoljavanja načela solidarnosti u zdravstvenom osiguranju, a s druge strane destimulisanja korišćenja prava na naknadu zarade, kada za to ne postoje medicinski razlozi, u skladu sa medicinsko-doktrinarnim standardima. Treba naglasiti da je procenat u kom se obezbeđuje pravo na naknadu zarade za vreme privremene sprečenosti za rad, usled povrede na radu ili profesionalne bolesti nije menjao, i iznosio je 100% od zarade osiguranika, čime se pokazuje namera da se ostvari načelo pravičnosti u oblasti obaveznog zdravstvenog osiguranja.

Iako je pravo na naknadu zarade za vreme privremene sprečenosti za rad u normativnom smislu imalo vrlo naprednu izgradnju u finansijskom smislu,

problemi u obezbeđivanju sredstava za ostvarivanje ovog prava su postajali sve veći. Osim poznatih događaja od 1990. godine koji su doveli do sveopšteg osiromašjenja društva, posebno je bitno smanjenje zaposlenosti čime se smanjuju prihodi iz doprinosa za obavezno zdravstveno osiguranje. S druge strane, krug osiguranika koji su i dalje obuhvaćeni obaveznim zdravstvenim osiguranjem nije smanjen. Davanja za lečenje su i dalje ista, a pozicija prava na naknadu zarade za vreme privremene sprečenosti za rad, pored izuzetnog značaja dolazi u drugi plan.

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HISTORICAL DEVELOPMENT OF LAW AND FINANCIAL ELEMENTS OF THE RIGHT TO WAGE COMPENSATION DURING TEMPORARY INABILITY TO WORK IN REPUBLIC OF SERBIA WITH A VIEW ON THE ACTUAL STATE

The main objective of this paper is to describe the development of the right to earnings compensation during a temporary disability to work. This right is of great importance in the system of health insurance, and therefore in social security as a whole. On the basis of this right, in the absence from work for medical reasons, the existence of the insured is not called into question. In Serbia, this right in the normative sense has a very dynamic development. No matter what has been introduced since 1945, in our country's socialistic social order, only a short period of funding for this right was financed from the budget. Since 1950, this right has been financed in a classical way, through contributions to compulsory social insurance. Apart from the fact that the right to remuneration has had a very dynamic development in terms of legislative activity, this right, regardless of its social component, was gradually reduced in order to accommodate the financial capabilities of society, ie. to ensure its financing to the extent that it is financially sustainable. Apart from the fact that this paper gives a normative presentation of the regulation of this right, exact financial indicators for its provision are given, which clearly show the importance of this right in terms of the overall health insurance system costs, and therefore the share of the same costs in the total health insurance expenditures as well.

Keywords: *the right to earnings compensation during temporary disability to work, law, contributions, costs.*

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OSNOVNE INFORMACIJE O ČASOPISU I UPUTSTVO ZA AUTORE

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Časopis je, prema klasifikaciji Ministarstva prosvete, nauke i tehnološkog razvoja Republike Srbije visoko pozicioniran kao vodeći nacionalni naučni časopis u Republici Srbiji (M51).

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- Međunarodni odnosi
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- Informaciono društvo

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Formule raditi uz pomoć editora formula u programu MS Word.

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- Knjiga: Akehurst Michael (1984): *A Modern Introduction to International Law*, London

- Poglavlje u knjizi više autora: Buchanan Allen (2010): "The Legitimacy of International Law", 79-96, in: Besson Samantha, Tasioulas John (eds.): *The Philosophy of International Law*, Oxford

- Članak: Osakwe Chris (1971): "Contemporary Soviet Doctrine on the Juridical Nature of Universal International Organizations", *American Journal of International Law* 3/1971, 502-521

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Primeri:

- Cassese Antonio (1999a): "Ex iniuria ius oritur. Are We Mowing towards International Legitimation of Forcible Humanitarian Countermeasures in the World Community?", *European Journal of International Law*, 1/1999, 23-30

- Cassese Antonio (1999b): "A Follow-Up: Forcible Humanitarian Countermeasures and Opinio Necessitatis", *European Journal of International Law*, 4/1999, 791-799

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Primer: Shaw N. Malcolm

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Primer: Simma Bruno, Alston Philip

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Primer: Henkin Louis et. al. (1993): *International Law: cases and Materials*, St. Paul. Minn.

3. Strane. - Kada se navodi određena strana (knjige, članka), ona se navodi samo brojem bez ikakvih dodataka (s., str., p., pp., стр., S., i sl.).

Primer: Akehurst Michael (1984): *A Modern Introduction to International Law*, London, 9.

4. Fusnote. - Kada se navodi fusnota, iza broja strane piše se skraćenica „fn“ i onda navodi broj citirane fusnote.

Primer: Akehurst Michael (1984): *A Modern Introduction to International Law*, London, 9, fn 2.

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Primer: Akehurst Michael, 15.

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Primer: Akehurst Michael (1984), 15.

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Primer: Akehurst Michael (1984a), 15.

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Primer: Ibid.

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Primer: Ibid, 54.

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Primer: Tomas Hobs (Thomas Hobbes)

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Ako se navodi i izdavač, piše se kurentom (obično) pre mesta izdanja.

Primer: Scott V. Shirley (2010): *International Law in World Politics*, Lynne Rienner Publishers Inc., Boulder – London, 71, fn 45.

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Primer: Scott V. Shirley (2010²): *International Law in World Politics*, Lynne Rienner Publishers Inc., Boulder - London (objašnjenje: 2010² - drugo izdanje, objavljeno 2010)

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Primer: Besson Samantha, Tasioulas John (eds.) (2010): *The Philosophy of International Law*, Oxford.

Ako je broj urednika veći od tri, navode se podaci samo za prvog urednika, zatim se posle zapete navodi „et al.“ i posle toga se navodi „ur.“.

Primer: Hamilton P. et al. (eds.) (1999): *The Permanent Court of Arbitration: International Arbitration and Dispute Resolution*, Kluwer International, The Hague-London-Boston.

4. Poglavlje u knjizi. - Poglavlje u knjizi koja ima urednika navodi se tako što se: 1) navode prezime i ime autora, 2) godina izdanja u zagradi, 3) dve tačke, 4) naziv poglavlja kurentom (pod navodnicama), 5) zapeta, 6) brojevi strana koje se citiraju, 7) „u“ odn. „in“, 8) prezime i ime urednika, 9) „(ur.)“ odn. „(eds.)“, 10) naziv knjige u kojoj je citirano delo, kurzivom (italikom) i 11) mesto izdanja.

Primer: Buchanan Allen (2010): “The Legitimacy of International Law”, 79-96, in: Besson Samantha, Tasioulas John (eds.): *The Philosophy of International Law*, Oxford.

3. Članci

1. Opšte. - Članci se navode na sledeći način: 1) prezime autora, 2) ime autora, 3) godina izdanja, 4) dve tačke, 5) naziv članka kurentom (obično) pod navodnicama, 6) naziv časopisa (zbornika i sl.) kurzivom (italikom), 7) broj i godište spojeni kosom crtom, 8) broj strane (bez ikakvih dodataka), 9) broj citirane fusnote.

Primer: Osakwe Chris (1971): "Contemporary Soviet Doctrine on the Juridical Nature of Universal International Organizations", *American Journal of International Law* 3/1971, 502, fn 1.

2. Skraćenica naziva časopisa. - Ako je naziv časopisa (zbornika i sl.) dug, prilikom prvog citiranja u zagradi sa navodi skraćenica pod kojom će se časopis (zbornik i sl.) nadalje pojavljivati.

Primer: Osakwe Chris (1971): "Contemporary Soviet Doctrine on the Juridical Nature of Universal International Organizations", *American Journal of International Law (AJIL)* 3/1971, 502-521.

4. Propisi

1. Opšte. - Propisi se navode na sledeći način: 1) naziv propisa se navodi u kurentu (obično), 2) kurzivom (italikom) navodi se glasilo u kojem je propis objavljen, 3) na kraju se navodi broj i godina glasila u kojem je propis objavljen.

Primer: Zakon o osnovama uređenja službi bezbednosti Republike Srbije, *Službeni glasnik Republike Srbije*, 116/2007.

2. Ponovno pominjanje propisa. - Ako se propis pominje kasnije, prilikom njegovog prvog pominjanja navodi se u zagradi njegov skraćeni naziv, s tim da se ispred skraćenog naziva stavlja objašnjenje „u daljem tekstu“.

Primer: Zakon o osnovama uređenja službi bezbednosti Republike Srbije (u daljem tekstu: Zakon o službama bezbednosti), *Službeni glasnik Republike Srbije*, 116/2007.

3. Izmene i dopune. - Ako je propis naknadno menjan i dopunjavan, navode se jedan za drugim brojevi i godine glasila u kojima su objavljeni izvorni tekst odn. izmene i dopune.

Primer: Zakon o osnovama uređenja službi bezbednosti Republike Srbije, *Službeni glasnik Republike Srbije*, 116/2007, 72/2012.

4. Članovi, stavovi i tačke propisa. - Članovi, stavovi, tačke (alineje) itd. propisa navode se kroz kosu crtu, tako što se prvo navodi broj člana, zatim stava, pa alineje itd.

Primer: Konvencija UN o pravu mora (1982) čl. 1/1/5/a/i.

5. Tekstovi sa interneta

Citiranje tekstova sa interneta treba da sadrži: 1) ime autora citiranog teksta (ako je reč o autorskom tekstu), 2) naziv citiranog teksta pod navodnicima, 3) podatke o tome gde je tekst objavljen (ako je objavljen u papirnoj verziji), 4) internet stranicu, 5) datum pristupa stranici.

Primer: Bradley A. Curtis, Gulati Mitu: "Withdrawing from International Custom", *The Yale Law Journal* 2/2010, 233-241, <http://yalelawjournal.org/images/pdfs/912.pdf> (18.11.2012).

GENERAL INFORMATION ON THE JOURNAL AND THE INSTRUCTIONS FOR AUTHORS

I. GENERAL INFORMATION ON THE JOURNAL

1. General. – “Megatrend Review” is the scientific journal published by Megatrend University (Megatrend univerzitet).

According to the classification of Ministry of Education, Science and Technological Development of the Republic of Serbia, the journal is ranked amongst the leading national scientific journals in Serbia (M51).

“Megatrend Review” journal has been published since 2004 in Serbian and English language. It is open to all high-quality papers and authors from around the world. It has an international Editorial Board and international Publishing Council. Through international exchange it reaches readers beyond the borders of Serbia.

“Megatrend Review” journal is a multidisciplinary journal in the fields of social sciences. Papers on following scientific fields are published:

- Economics
- Law
- Politics and Security
- Management and Marketing
- International Relations
- Public Policies
- Information Society

2. Reviews. – Each paper is reviewed by two reviewers. Paper that has received two positive reviews will be published according to standard categorization of the scientific journals: original scientific paper, review scientific article, expert article, preliminary report or overview, translation and book review..

The categorization of the paper is determined by the reviewers and Editor in chief. If there is any doubt regarding the categorisation, the given higher category will be applied.

In case that one of the reviewers suggests that the paper should be published and the other that it should not, the paper is going to be given to the third reviewer whose decision is final.

3. Anonymity of the authors and reviewers. – Editorial of the “Megatrend review” journal abides by the rule on mutual anonymity between authors and reviewers. Further, if the author is not satisfied with the reviews of the paper, he / she, has the right to receive the reviews.

II. PAPER ORIGINALITY AND FIGHTING AGAINST PLAGIARISM

We kindly ask the authors to take into consideration the following:

1. Written confirmation that the work is original. - When submitting a manuscript the author is required to confirm in writing that his/her paper is original and that it has not been published elsewhere. The paper that is sent without this written confirmation by the author, will not be accepted.

2. The paper that has previously been published elsewhere. - If for any reason the author submits the paper that has already been published elsewhere (abroad, in a foreign language), he/she is obliged to specify where the paper was published (the journal, issue and number, the number of pages) and enclose the written consent of the editorial board of the journal in which the paper was originally published. If these requirements are met, and editors conclude that the paper is for some reason of particular interest and should therefore be published, it will be published with indication where it was published first and that it is republished in "Megatrend Review" with permission.

However, if the paper has already been published elsewhere, and also submitted for publication in "Megatrend Review" with no information about previous publication, the paper will not be published. In addition, as a sanction for unfairness, in the next issue of "Megatrend Review" the information that a particular author has unfairly tried to re-publish the same paper will be published in a special section. Apart from that, the papers by the same author will not be published in "Megatrend Review" in the future.

3. Plagiarism. - Should the editors of "Megatrend Review" journal or through reviewers discover that the paper submitted for publication is plagiarism, in a special section of its next issue the information that a particular author has plagiarized a paper will be published, and the original paper from which the plagiarism is taken will be cited. In addition, the papers by the same author will not be published in "Megatrend Review" in the future. If necessary, the author whose paper has been copied or the editorial board of the journal that has published the original paper will be notified.

III. INSTRUCTIONS FOR AUTHORS

The papers are to be prepared in accordance with the following instructions:

1. The Manuscript

The manuscript is submitted in electronic form (MS Word). Page size: A4, font Times New Roman (size 12 pt for text including abstract, line spacing: single. The

papers written in Serbian language are submitted in Serbian Latin script. The papers are submitted to the following e-mail address: **megatrendrevija@megatrend.edu.rs**

The paper should be accompanied by the written Author's Statement of originality signed by the author (written, signed and scanned).

Precondition for the paper to be accepted for the reviewing procedure is that it fully satisfies technical criteria according to the instructions given here. Also, the paper must meet the criteria regarding the language (Serbian and English) and spelling. The paper has to be proofread before submission

2. Number of authors

As a rule, papers written only by one author are preferable for publication (an author as an individual). However, if consider justified, , according to current Rules of Procedure, the Method of Evaluation and Quantitative Expression of Scientific Research Results of the Researchers (*Pravilnik o postupku, načinu vrednovanja i kvantitativnom iskazivanju naučnoistraživačkih rezultata istraživača*, Službeni glasnik RS no. 24/2016 and 21/2017), editors can decide to publish papers written by co-authors, but not more than three.

3. Language

The text is submitted in Serbian or English language. If accepted, it will be published in the language in which it was submitted.

Exceptionally, the editors will decide that the text submitted in Serbian language is to be translated and published in English, or vice versa.

4. Volume

The paper should approximately have 30.000 characters, including spaces (one author's sheet). Alternatively, it could be shorter or longer, the number of characters with spaces not being smaller than 20,000 nor bigger than 45,000.

Due to particularly justified reasons (the special social importance of the topic, the co-authorship of a number of internationally recognized scientists, etc.) the editorial board could exceptionally allow the publication of an article of a larger volume, but not larger than 2.5 author's sheets (75,000 characters).

5. Tables and Formulae

The tables should only be made by means of table tools in MS Word. The tables must have titles and be numbered in Arabic numerals.

The formulae should be written by means of the equation editor in MS Word.

6. Graphs, Figures and Photographs

Graphs and figures can be submitted drawn on paper or in electronic form. When the graphs and figures are submitted in electronic form, they should be in one of the following formats: EPS, AI, EPS, TIF or JPG. If the author uses these or uses a specific program, it is necessary to agree on the format with the technical editor. **Graphs and figures should not be made in MS Word!**

Photographs must be sharp, in good contrast and undamaged. The authors are not advised to scan the images themselves, but to leave this sensitive job to the editorial office.

If the version on the paper does not include graphs, figures and photographs, the spaces must be clearly marked where they should be inserted. The markings in the text must match the ones in the submitted photos (or files).

Graphs, figures and photographs must have the signatures and be numbered in Arabic numerals.

7. Organization of manuscript

The article must contain the following elements, in the following order:

1 Information about the author – Name and surname, title of the author, name of the institution where the author is employed (affiliation) and the author's e-mail address.

2. Title of the paper. – The title should be clear and precise.

3. Abstract. – This is a brief presentation of the article content, which contains the research goal, methods, results, and main conclusions. It should be in the same language in which the paper was written. In terms of volume, it should contain 100 to 250 words or 4 to 8 sentences, or a third to half of the printed page. It stands between the title and keywords, after which the text of the article follows.

4. Key words. – The terms or phrases which best describe the content of the article. It is allowed to write up to five words, i.e. phrases.

5. Text of the article. – The central part is the text of the article in which the author uses appropriate tools while processing the writing of a scientific paper.

6. List of used literature. – After the text of the article, the list of used literature is specified in alphabetical order by authors' last name.

The list is given according to the Citation instructions, with the year of publication coming right after the author's, i.e. editor's name. At the end of the information on an article or a paper in the collection of papers, the pages of the cited paper are given.

Examples:

- A book: Akehurst Michael (1984): *A Modern Introduction to International Law*, London

- A chapter in the book by several authors: Buchanan Allen (2010): "The Legitimacy of International Law", 79-96, in: Besson Samantha, Tasioulas John (eds.): *The Philosophy of International Law*, Oxford

- A paper: Osakwe Chris (1971): "Contemporary Soviet Doctrine on the Juridical Nature of Universal International Organizations", *American Journal of International Law* 3/1971, 502-521

The papers by the same author are specified in chronological order. If several papers have been written by the same author and published in the same year, the year of publication is accompanied by the letters "a", "b", "c" etc.

Examples:

- Cassese Antonio (1999a): "Ex iniuria ius oritur. Are We Mowing towards International Legitimation of Forcible Humanitarian Countermeasures in the World Community?", *European Journal of International Law*, 1/1999, 23-30

- Cassese Antonio (1999b): "A Follow-Up: Forcible Humanitarian Countermeasures and *Opinio Necessitatis*", *European Journal of International Law*, 4/1999, 791-799

7. Summary. – Summary is written at the very end of the text i.e. It can be the same as the abstract, but could also be wider in extent, yet no longer than one page. If the paper is written in Serbian language, the summary in English language should also be submitted.

8. The levels of the titles. - Depending on the text, the titles can have different levels. Therefore the following method is used for marking different title levels:

1. The First Level Title

(centre align, regular, bold, Arabic numerals)

1.1 The second level title

(centre align, italic, Arabic numerals)

1.1.1. The third level title

(Above the beginning of the paragraph, italic, Arabic numerals.)

To achieve complete clarity about the title levels, authors are advised to refer to the past issues of "Megatrend Review" journal available in PDF forms, under Archive, or contact the Editorial secretary via e-mail.

Depending on the specific characteristics of the text, and with the aim of achieving clarity of the paper's structure, the editorial office reserves the right to edit the titles in a slightly different way, leaving the original heading divisions.

9. Citations. – The used literature is to be cited according to the instructions for citations given below.

10. The address of the Editorial Board. – The papers are submitted via e-mail to the following address: **megatrendrevija@megatrend.edu.rs**

Editorial Board
Megatrend Review
Megatrend University / Megatrend univerzitet
Bulevar maršala Tolbuhina 8
11070 Belgrade, Serbia
Telephone: + 381 11 220-31-50

IV. INSTRUCTIONS FOR CITATIONS

1. General rules

1. Name of the author. – In writing author's name, surname is written before the first name. If there is the middle name/letter, it is written between surname and the first name.

Example: Shaw N. Malcolm

2. Several authors. – Names of the several authors are separated by commas.

Example: Simma Bruno, Alston Philip

If there are more than three authors, only the first author's surname and first name are specified, followed by the italicized et al. words (et alia).

Example: Henkin Louis *et. al.* (1993): *International Law: Cases and Materials*, St. Paul. Minn.

3. Pages. – When a particular page is specified (of the book or the paper), its number is written without any additions (p., pg., p., page, etc.).

Example: Akehurst Michael (1984): *A Modern Introduction to International Law*, London, 9.

4. Footnotes. – When a footnote is given, after the number of the page, the sign "fn" is written, followed by the number of the footnote.

Example: Akehurst Michae (1984)]: *A Modern Introduction to International Law*, London, 9, fn 2.

5. The repeated citation of the same article. – When an article that has been cited before is recited, the author's surname and first name are specified, followed by the cited page, separated by a comma, without using *op. cit.* etc.

Example: Akehurst Michael, 15.

If several papers by the same author are specified, the author's surname and first name are stated, followed by the brackets with the year when the paper has been published and followed by the number of the page.

Example: Akehurst Michael (1984), 15.

When specifying several papers written by the same author, published in the same year, papers are specified in the literature list (which is always given at the end of the paper) by adding Latin letters “a”, “b”, “c”, etc to each paper. They are also stated as such when cited in footnotes.

Example: Akehurst Michael (1984a), 15.

6. Recitation of the previously cited article. - If a piece of data from the same page of the same paper cited in the previous footnote is cited again, only the Latin abbreviation *Ibid.* (from *ibidem*) is used without giving any other data.

Example: *Ibid.*

If a piece of data cited in the previous footnote is cited again, but from a different page, the Latin abbreviation *Ibid.* is used, followed by a comma and the number of the page.

Example: *Ibid.*, 54.

7. Foreign names. – In papers submitted in Serbian language, foreign names are transcribed, i.e. written as they are pronounced in Serbian, and when first mentioned in the text, the author's surname and first name are given in their original form within the brackets.

Example: Tomas Hobs (Thomas Hobbes)

2. Books

1. General. – The books are cited in the following way:

1) author's surname, 2) author's first name, 3) the year of publication in brackets, 4) colon, 5) title of the book in italics, 6) place of the publication in lowercase (ordinary letters), 7) number of the page (without any additions), 8) footnote which is being cited.

If the information on the publisher is given as well, it is written in lowercase (ordinary letters) before the place of the publication.

Example: Scott V. Shirley (2010): *International Law in World Politics*, Lynne Rienner Publishers Inc., Boulder – London, 71, fn 45.

2. Several editions. – If a book has several editions the number of the edition need/need not be specified in the superscript.

Example: Scott V. Shirley (2010²): *International Law in World Politics*, Lynne Rienner Publishers Inc., Boulder - London (explanation: 2010² - second edition, published 2010)

3. Editors. – If a book has one or more editors, the editors' surnames and first names are given first, separated by commas, then the sign “ed”, or “eds” is

written if there are more of them, followed by the title of the book in italics, and finally the place and year of publication.

Example: Besson Samantha, Tasioulas John (eds.) (2010): *The Philosophy of International Law*, Oxford.

If there are more than three editors, the data only for the first editor is given followed by a comma, then “et al.”, and finally “ed.”.

Example: Hamilton P. et al. (eds.) (1999): *The Permanent Court of Arbitration: International Arbitration and Dispute Resolution*, Kluwer International, The Hague-London-Boston.

4. Chapters in a book. – A chapter in a book with an editor is cited by giving the following: 1) authors surname and name, 2) year of publication in brackets, 3) colon, 4) title of the chapter in lowercase (under inverted commas), 5) comma 6) number of pages that are cited, 7) “in”, 8) editor’s surname and name, 9) “(eds.)”, 10) title of the book in which the cited text is in lowercase (in italics) and 11) place of publication.

Example: Buchanan Allen (2010): “The Legitimacy of International Law”, 79-96, in: Besson Samantha, Tasioulas John (eds.): *The Philosophy of International Law*, Oxford.

3. Articles

1. General. – The articles are cited in the following way: 1) author’s surname, 2) author’s name, 3) year of publication in brackets, 4) colon, 5) title of the article in lowercase in ordinary letters under inverted commas, 6) title of the journal (book of proceedings, etc.) in italics, 7) issue and year separated by a slash, 8) number of the page (without any additions), 9) number of the cited footnote.

Example: Osakwe Chris (1971): “Contemporary Soviet Doctrine on the Juridical Nature of Universal International Organizations”, *American Journal of International Law* 3/1971, 502, fn 1.

2. The abbreviation of the journal title. – If the title of the journal (collection of papers etc.) is a long one, when cited for the first time its abbreviation is given in brackets, which is later used when the same journal (book of proceedings, etc.) is cited again.

Example: Osakwe Chris (1971): “Contemporary Soviet Doctrine on the Juridical Nature of Universal International Organizations”, *American Journal of International Law (AJIL)* 3/1971, 502-521.

4. Regulations

1. General. – Regulations are cited in the following way: 1) title of the regulation is given in lowercase (in general letters), 2) journal/magazine in which the regulation is published is given in italics, 3) number of the issue and the year in which the journal is published are given at the end.

Example: Zakon o osnovama uređenja službi bezbednosti Republike Srbije, *Službeni glasnik Republike Srbije*, 116/2007.

2. If the regulations are re-mentioned. – If a regulation is mentioned again later in the text, at the place where it appears for the first time its short title is given within the brackets, with the words “hereinafter referred to as” preceding it.

Example: Zakon o osnovama uređenja službi bezbednosti Republike Srbije (u daljem tekstu: Zakon o službama bezbednosti), *Službeni glasnik Republike Srbije*, 116/2007.

3. Amendments. – If a regulation has been changed and amended, one by one, the numbers of issues and year of the journals are given in the original text, i.e. amendments were published.

Example: Zakon o osnovama uređenja službi bezbednosti Republike Srbije, *Službeni glasnik Republike Srbije*, 116/2007, 72/2012.

4. Articles, paragraphs and items of regulations. – Articles, paragraphs and items of regulations are written separated by a slash, the number of the article comes first, followed by the number of the paragraph, and finally that of the item, etc.

Example: UN Convention on the Law of the Sea (1982) čl. 1/1/5/a/i.

5. The Internet texts

The citation of the text from the Internet should contain: 1) name of the author of the cited text (if it is the author's text), 2) title of the cited text under inverted commas, 3) data on where the text was published (if it is published in a printed version), 4) internet page, 5) date of the access to the page.

Example: Bradley A. Curtis, Gulati Mitu: “Withdrawing from International Custom”, *The Yale Law Journal* 2/2010, 233-241, <http://yalelawjournal.org/images/pdfs/912.pdf> (18.11.2012).



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