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GENDER AS A DETERMINANT OF PARENTS AND CHILDREN'S ATTITUDES TOWARD THE INCLUSION OF SPORTS BRANCHES INTO THE ELEMENTARY SCHOOL CURRICULUM

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Abstract

In Serbia's elementary schools, physical education is an obligatory course from the very beginning of education. This is why schools and academic staff can use their authority and behaviour to promote a healthy lifestyle among children. Parents, who are the models of good behaviour, opinions, and attitudes, likewise participate in the promotion of a healthy lifestyle among children. Thus, so as to ensure that the process of building healthy habits and an active lifestyles is as successful as possible, it is important to bear in mind the interests and preferences of both groups, as well as their gender differences. The research sample included 8,002 schoolchildren in their fifth year of education, and 5,768 parents. The independent variables were gender and participation in sport, and the dependent variables were 27 sport activities. The data was processed using non-parametric statistics, χ^2 and crosstabs. The results show that soccer, basketball, swimming and volleyball are the sports which schoolchildren most like to participate in, and which parents prefer for their children. In terms of the choice of sport, significant differences were determined between the boys and the girls, as well as between the mothers and the fathers.

Key words: interests, physical education, preferences, pupils, sex

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РОДНЕ РАЗЛИКЕ У СТАВОВИМА РОДИТЕЉА И ДЕЦЕ ПРЕМА УКЉУЧИВАЊУ РАЗЛИЧИТИХ СПОРТСКИХ ГРАНА У ПРОГРАМ ОСНОВНЕ ШКОЛЕ

Апстракт

Физичко васпитање је у основним школама у Србији обавезан предмет већ од првог разреда. Као последица тога, школа и наставно особље својим институционалним деловањем и ауторитетом могу допринети формирању здравих навика и промовисању здравог начина живота међу ученицима. Ту улогу имају и родитељи, који такође могу послужити као узорци за усвајање пожељних облика понашања и за формирање мишљења, ставова и навика. Стога је важно познавати интересовања и преференције и родитеља и ученика, али и уважити значај родних разлика, како би процес усвајања навика здравог животног стила био што успешнији и дуготрајнији. У овом истраживању је узорком обухваћено 8.002 ученика петог разреда и 5.768 родитеља. Независне варијабле су биле пол и бављење спортом, а зависне варијабле су обухватиле 27 врста спортова. Подаци су обрађени уз помоћ χ^2 и непараметријске статистике. Резултати су показали да би ученици и родитељи највише волели да се у наставу уведу фудбал, кошарка, пливање и одбојка. По питању преференције спорта, у односу на пол су добијене статистички значајне разлике и међу ученицима и међу родитељима.

Кључне речи: интересовања, физичко васпитање, преференције, ученици, пол

INTRODUCTION

During the last few decades, an increasing number of studies from various disciplines has focused on the importance that exercise and a healthy lifestyle have for the psychological and physical health of the nation. Considering the fact that it is an obligatory course in the educational system from an early age, one of the best means of promoting a healthy lifestyle is physical education. Schools are able to affect the attitudes and behaviour of a large number of young children, irrespective of their socio-economic status, gender, cultural heritage or unfavourable circumstances at home (Ferreira et al., 2006; Radenović & Mijatović, 2017). Additionally, the curriculum for each individual grade, or cohort of students, sets up certain physical and socio-psychological goals and tasks (Gore, 1990).

With the aim of achieving these goals, and promoting the strategies of a long-term acquisition of a healthy lifestyle and habit development, it is of great importance to bear in mind both the interests and the preferences of the schoolchildren. Namely, considering the fact that most physical education classes for younger children revolve around the 43 basic types of individual sport (with the exception of swimming since most elementary schools do not have access to a pool where the training and swimming course would take place), and team sports (considering that they are simplest to teach since they require the participation of all the children in the class and there is appropriate equipment already installed

in the gyms), it is important to determine the interests of older schoolchildren, so as to prevent a decrease in their motivation for active participation in physical education classes. The research carried out by Višnjić et al. (2011), on a sample of older elementary school children, showed that a decrease in motivation for active participation in physical education classes occurs as early as the fourth grade, and that this trend continues in later grades. In the case of boys, this decrease occurs sometime in the seventh grade, while the highest motivation for active participation in physical education classes is found among fifth graders, irrespective of gender. To prevent a decrease in interest, we can monitor the attitudes of schoolchildren towards sport, the popularity of certain sports, and the children's preferences for taking part in certain types of sport. Thus, it would be possible to introduce certain sports, which the schoolchildren show interest in, into regular physical education classes, provided that the minimum technical conditions are met (space, equipment, etc.). For this reason, the idea of providing schoolchildren with the right to make their own choices regarding the content of the curriculum has garnered a lot of attention over the past few years. Cleland et al. (2008) concluded that, even though physical education classes were mandatory in schools in Australia, they did not have a long-term effect on the level of physical activity in adulthood. This confirms the conclusions of Dollman and Lewis (2007), who proposed that schools alone cannot provide a sustainable level of increase in physical activity among children which would last until they reached adulthood, and that, without any extracurricular support, positive results cannot be sustained easily. Some authors (Gore, 1990; Drummond et al., 2010, Randelović & Savić, 2016) point out that the strategies based solely on adhering to the curriculum offer minimum results since they do not take the broader picture into consideration. The inclusion of the family is useful, and the provision of extracurricular and non-competitive activities contributes to the realisation of the curriculum. Interventions have a lower effect on schoolchildren of a lower material status due, in large part, to the lack of financial support.

The family and the home environment are factors that influence physical activity – the structure of the family, parental support, and the atmosphere in the home can induce or limit the child's physical activity (Telford et al., 2004). According to the model of parent socialisation described by Eccles, the beliefs that parents have about their children influence the way they interact with them. These interactions include encouraging children and providing them with opportunities, which, in turn, affect the motivation of the child (Fredericks & Eccles, 2004). Beets, Cardinal and Alderman (2010) cite that parental influence is most pronounced between the ages of 5 and 12, and that it takes place in various ways and through various mechanisms – parental behaviour functions as

a model, or even encourages and focuses certain activities by promoting one's own attitudes, convictions and values.

In Serbia, there are very few studies (Ilić, 2013) that focus on parental attitudes towards physical education classes, and more studies are focused on the children's participation in them (Krsmanović, 1996; Đorđić & Tumin, 2008; Milanović & Radisavljević – Janić, 2011; Radojević et al., 2011; Šekeljić & Stamatović, 2011; Ilić et al., 2012; Šekeljić et al., 2012; Višnjic & Sretenović, 2014). Interestingly, no studies in Serbia focus on the interaction of the interests of parents and children, while some studies have tried to investigate the significance of the role of active parental involvement in their children's elementary education process (Radojlović et al., 2015). Thus, the aim of this study is to determine the influence of gender on the choice of physical activities both parents and their children would like to see included in the annual physical education curriculum.

METHODOLOGY

Sample

The sample includes 8,002 fifth grade schoolchildren ages 11 through 12 ($M = 11.7$, $SD = 0.42$), of which 3,970 are male and 4,032 are female, and 5,768 parents (3,467 mothers and 2,301 fathers) from around Serbia. The initial idea was to examine pairs of parents, but due to the big disproportion in the number of returned questionnaires filled by the mother and the father of the same child, the realisation of this idea was not possible. Also, only the parents of children from schools whose Parental board gave consent for this research to be conducted were included in the sample. Since previous research on the subject was done mostly on samples including schoolchildren from grades five through eight, this research focused on the fifth grade, as the backgrounds of the subjects, classes and even the school building and environment are subject to change (e.g. pupils from distant departments and sections moving to the central school/building).

Questionnaire

The questionnaire about parental attitudes and children's interests was created for the purpose of this research. The system of independent variables in the questionnaire includes the following items: gender of parents and children (male and female), and participation in sport (active, no longer involved, never took part in sport). The system of dependent variables includes the following selection of sports: athletics, aerobics, aikido, acrobatics, badminton, cycling, judo, fitness, soccer, gymnastics, karate, basketball, volleyball, orienteering, swimming, rhythmic gymnas-

tics, handball, wrestling, synchronised swimming, skiing, sports dancing, table tennis, archery, taekwondo, tennis, water polo, and rowing. The list of sports was based on previous, select research (Radojević et al., 2011; Ilić et al. 2012; Ilić, 2013).

Data Processing

The obtained data was processed using non-parametric statistics (percentages, crosstabs and χ^2) in the SPSS 22 programme.

Procedure

Schoolchildren were given questionnaires during their physical education classes (between January and December 2019), and were asked to fill them out. Their task was to complete this assignment at home, and to give their parents the questionnaire designed for them. A total of 10,000 questionnaires were distributed to schoolchildren, and the same number of questionnaires was distributed to parents. Approximately 20% of the questionnaires distributed to schoolchildren, and 42% of the questionnaires distributed to parents were returned, even though the survey was carried out in agreement with the school authorities, teachers and schoolchildren.

RESULTS

The sports that the schoolchildren in Serbia most wanted to participate in were soccer, basketball, swimming, and volleyball. The schoolchildren expressed the least desire to take part in wrestling and acrobatics. A statistically significant difference in relation to the choice of sport was determined between the answers of boys and girls ($\chi^2 = 3075,535$, $df = 26$, $p < .000$). The boys wanted to take part in soccer the most, followed by basketball and swimming, and the girls wanted to take part in volleyball, swimming, and basketball. The boys did not want to take part in rhythmic gymnastics, wrestling, aerobics, orienteering, and synchronised swimming, while the girls chose not to participate in wrestling, water polo, rowing, and acrobatics.

The sports that the parents would like their children to participate in the most are swimming, soccer, basketball, and volleyball, and the sports which the parents did not want their children to take part in were acrobatics, wrestling, and rowing (Table 1). A statistically significant difference in relation to the choice of sport was determined between the answers provided by fathers and mothers ($\chi^2 = 145.04$, $df = 26$, $p < .00$). Fathers wanted their children to take part in soccer and swimming, as well as basketball, volleyball and athletics. Acrobatics, wrestling, and orienteering were marked as sports in which fathers would least like their chil-

dren to participate. Mothers preferred their children to take part primarily in swimming, followed by basketball, soccer, volleyball, and marked wrestling, acrobatics, orienteering, and rowing as sports in which they would least like their children to participate.

Table 1. An overview of the interest in sport in relation to the gender of schoolchildren and parents (in percentages)

Sport	Boys	Girls	Total children	Fathers	Mothers	Total parents
1 Athletics	2.11	3.44	2.78*	6.04	3.89	4.75*
2 Aerobic	0.17	5.62	2.92*	1.82	3.11	2.60
3 Aikido	2.94	1.63	2.28*	3.30	2.36	2.73*
4 Acrobatics	0.20	0.19	0.19	0.08	0.08	0.08
5 Badminton	0.35	1.48	0.90*	0.30	0.57	0.46
6 Bicycling	4.03	2.43	3.22*	1.30	1.67	1.52
7 Judo	2.26	0.62	1.43*	1.52	1.00	1.21
8 Fitness	0.50	2.70	1.61*	0.78	1.29	1.09
9 Soccer	36.77	2.25	19.38*	19.16	11.99	14.85*
10 Gymnastics	0.70	5.67	3.21*	3.73	5.16	4.59*
11 Karate	4.83	4.76	4.97	4.56	4.18	4.33
12 Basketball	15.96	7.68	11.79*	13.21	12.31	12.67
13 Volleyball	3.14	18.60	10.93*	9.30	10.96	10.29*
14 Orienteering	0.20	0.39	0.29	0.25	0.25	0.36
15 Swimming	7.20	16.09	11.68*	18.38	22.95	21.13*
16 Rhythmic gymnastics	0.07	3.99	2.04*	1.34	2.76	2.20*
17 Handball	4.28	5.08	4.68*	3.65	4.26	4.02
18 Wrestling	0.15	0.07	0.11	0.01	0.00	0.05
19 Synchronized swimming	0.20	1.26	0.73*	0.34	0.69	0.55
20 Skiing	0.88	0.99	0.93	0.52	0.51	0.52
21 Dance	0.27	5.77	3.04*	1.21	2.04	1.71*
22 Table tennis	3.04	1.06	2.04*	1.56	1.41	1.47
23 Shooting	4.48	1.90	3.38*	1.99	1.47	1.68
24 Taekwondo	0.65	0.74	0.69	0.65	0.66	0.65
25 Tennis	1.58	5.20	3.41*	2.86	3.02	2.96
26 Water polo	1.91	0.09	0.99*	1.21	1.09	1.14
27 Rowing	0.60	0.15	0.37	0.43	0.17	0.27

Note: *Statistically significant differences were found in relation to gender

In terms of participation in sport, it was determined that 41% of the schoolchildren had never taken part in any kind of sport, 29% had stopped participating in sports, and 30% have actively been participating in sports for 2.5 years, on average ($SD = 1.81$). A statistically significant difference was determined between the answers provided by boys and girls ($\chi^2 = 393.51$, $df = 10$, $p < .00$). Half of the girls included in the sample had never taken part in sports, which is 20% more in comparison with the boys. Conversely, 40% of the boys took part in sports, which is 18%

more when compared to the girls. The number of those who had stopped participating in sports was approximately the same.

A statistically significant difference was determined between the schoolchildren's answers in relation to participation in sports activities and choice of sport ($\chi^2 = 681.18$, $df = 260$, $p < .00$). Schoolchildren who actively take part in sports were very interested in soccer, basketball, volleyball, swimming, and handball. Schoolchildren who had given up participating in sports were mostly interested in soccer, followed by swimming, basketball, volleyball, and skiing, while those who do not take part in sports were mostly interested in soccer, volleyball, swimming, basketball, and karate (Table 2).

Table 2. An overview of the interest in sport in relation to the schoolchildren's participation in sports (in percentages)

Sport	Never took part in sport	No longer involved	Active
1 Athletics	3.08	2.78	2.43
2 Aerobic	4.67	2.46	0.97
3 Aikido	2.17	2.55	2.19
4 Acrobatics	0.12	0.35	0.16
5 Badminton	1.43	0.67	0.48
6 Bicycling	3.70	3.36	2.47
7 Judo	1.10	1.03	2.07
8 Fitness	2.35	1.25	0.93
9 Soccer	15.44	19.97	24.13
10 Gymnastics	4.55	2.24	2.19
11 Karate	5.65	3.81	4.51
12 Basketball	9.93	10.99	14.99
13 Volleyball	12.41	9.47	10.44
14 Orienteering	0.24	0.40	0.28
15 Swimming	12.38	13.42	9.22
16 Rhythmic gymnastics	2.17	2.15	1.78
17 Handball	3.51	4.57	6.25
18 Wrestling	0.12	0.08	0.12
19 Synchronized swimming	0.42	1.16	0.77
20 Skiing	0.97	5.29	1.05
21 Dance	3.27	3.99	1.95
22 Table tennis	1.80	2.51	1.86
23 Shooting	3.48	3.90	2.76
24 Taekwondo	0.42	0.53	1.21
25 Tennis	3.79	4.03	2.35
26 Water polo	0.42	1.07	1.62
27 Rowing	0.27	0.31	0.56

In the case of the relationship between the parents' and children's choice of sport, statistically significant differences were determined for schoolchildren's participation in sports ($\chi^2 = 750.93$, $df = 676$, $p < .02$),

but there was also a statistically significant correlation which could indicate certain regularities ($\varphi = 0.36$), while Pearson's contingency coefficient was 0.34 (both are significant at the $p < .02$ level). In the case of schoolchildren who were more interested in soccer, swimming, and basketball, a uniform parental decision regarding sport can be observed, since the parents were mostly in favour of swimming, followed by soccer, basketball, and volleyball. On the other hand, the children of parents who preferred soccer were most interested in soccer, basketball, and volleyball, and the children of parents who preferred swimming were mostly interested in soccer, basketball, swimming, and volleyball, but also karate and archery. The children of parents who preferred basketball were most interested in soccer, basketball, swimming, and volleyball.

At the same time, when it comes to schoolchildren interested in athletics, water polo, table tennis, archery, taekwondo, and karate, their parents mostly expressed interest in swimming. The parents of children interested in aerobics were mostly interested in soccer, and the parents of children interested in aikido, volleyball, tennis, and judo were mostly interested in swimming and soccer. In addition, the parents of children interested in cycling were mostly interested in swimming, and the parents of children interested in fitness, handball, and rhythmic gymnastics were mostly interested in soccer. Finally, the parents of children interested in sports dancing were likewise interested in soccer, basketball and swimming.

DISCUSSION

The sports that the schoolchildren in Serbia would like to participate in most were soccer, basketball, swimming, and volleyball, which is in agreement with the results obtained by Višnjić and Sretenović (2014) which indicated that schoolchildren would like more access to swimming, soccer, volleyball, tennis, and basketball. Radojević et al. (2011) determined a preference for basketball, swimming, volleyball, and soccer, and Milanović and Radisavljević-Janić (2011), who worked with a sample of schoolchildren from Belgrade, concluded that schoolchildren mostly took part in basketball, volleyball, and soccer. Ilić et al. (2012) concluded that schoolchildren would welcome the introduction of swimming, soccer, basketball, and volleyball into the school curriculum.

A statistically significant difference was determined between the answers provided by boys and girls in relation to the choice of sport. The boys would most like to take part in soccer, basketball, and swimming, and the girls would most like to take part in volleyball, swimming, and basketball. This data is in agreement with the results of Đorđić and Tumin (2008), whose research indicates that boys prefer soccer in physical education classes, and Đokić (2014), who determined that boys in elementary school are most involved in soccer and basketball, whereas girls in ele-

mentary school are most involved in volleyball, swimming, and tennis. Additionally, the results of our research are in agreement with the research results of Šekeljić et al. (2012), which indicate that boys in the fourth grade of elementary school are most interested in soccer and basketball, and that girls in the fourth grade of elementary school are most interested in volleyball and basketball. Similar results were obtained by Radojević et al. (2011), who determined that boys would like to take part in basketball and soccer, and that girls would like to take part in volleyball and swimming. However, there are differences between the results of our research and the results of the research of Milanović and Radislavljević-Janić (2011), conducted on a sample of Belgrade schoolchildren, which determined that boys mostly took part in basketball and soccer, while girls mostly participated in volleyball and dancing. The results of our research also differ from the results obtained by Šekeljić and Stamatović (2011) on a sample of schoolchildren from Užice, which indicate that girls are most interested in volleyball, soccer, basketball, and gymnastics. In addition, the results of this research differ from the research results of Ilić et al. (2012), which indicate that boys would prefer basketball and soccer as a regular part of the curriculum, while girls would prefer volleyball and swimming.

This research determined that schoolchildren would least like to take part in wrestling and acrobatics, while Radojević et al. (2011) determined that schoolchildren would least like to take part in acrobatics, orienteering and rhythmic gymnastics. Greenwood and Byars (2001) determined the same for orienteering. Ilić et al. (2012), working with a sample of Belgrade elementary schoolchildren, determined that schoolchildren would least like wrestling to be introduced into the curriculum, along with acrobatics, orienteering, and rowing. According to our research, the sports boys would least like to participate in were gymnastics, wrestling, aerobics, orienteering, and synchronised swimming, while girls expressed the least desire to participate in wrestling, water polo, rowing, and acrobatics. The results obtained in a study conducted by Radojević et al. (2011) indicate that boys are least interested in acrobatics, rhythmic gymnastics, and synchronised swimming, while girls are least interested in acrobatics, wrestling, and rowing, which is in agreement with the results of our study which pertain to girls. A possible explanation for this agreement can be found in cultural specificity and social norms, since rowing is not seen as a feminine sport (Bačanac & Lazarević, 2002; Klomsten et al., 2005; Petrović, 2020; Sanader et al, 2021) due to the fact that it contributes to the development of musculature and a body shape which is not considered feminine enough in Serbian society. The same explanation is valid for wrestling as well, considering the fact that this sport is based on strength and intense physical contact with one's opponent. A special hindrance for these two sports, and for water polo most of all, is the lack of

female role models for girls (Vujović et al., 2017; Sanader, 2021). Unlike male water polo, which is the most successful Serbian sport, along with basketball (Ilić & Ljubojević, 2011; Milenković & Ilić, 2013; Sari et al., 2013), women's competitions barely number 100 female participants. Boys would prefer to take part in aikido, cycling, judo, soccer, basketball, table tennis, archery, and water polo, while girls would prefer to participate in athletics, aerobics, badminton, fitness, gymnastics, volleyball, swimming, rhythmic gymnastics, handball, synchronised swimming, sports dance, and tennis. Ilić et al. (2012) determined that boys would not like aerobics to be introduced into the curriculum, and that girls would dislike water polo as part of the curriculum. Pupils of both genders were equally interested in acrobatics, karate, orienteering, wrestling, skiing, taekwondo, and rowing. With the exception of karate, all these sports ranked lower on the desirability scale. The lowest-ranked sports were the ones for which less than one percent of the participants of both groups opted. These include: acrobatics, orienteering, wrestling, skiing, taekwondo, and rowing. Aerobics, gymnastics, rhythmic gymnastics, and sports dancing were all selected by less than one percent of the boys, while judo was selected by less than one percent of the girls in our sample. Fitness was selected by less than one percent of the boys and fathers in the sample of this research.

These results confirm the theory on the influence of gender stereotypes on the male participants, even though the stereotypes proved more dominant among male schoolchildren than among fathers, considering the fact that less than one percent of fathers opted for aerobics, gymnastics, rhythmic gymnastics, and sports dancing. The female participants from both groups are not influenced by gender stereotypes in sport to the same degree, which is in accordance with the findings of Đorđić and Tumin (2008). This can be explained by the onset of puberty, which makes male schoolchildren more susceptible to gender stereotypes. Additionally, it is possible that the fathers who proved less susceptible to stereotypes have daughters. This assumption is further supported by the fact that less than one percent of the boys opted for 13 different sports, less than one percent of the girls opted for 7, less than one percent of the fathers opted for 9, and less than one percent of the mothers opted for 8. In addition, less than one percent of the female members of both groups chose water polo, and this same share of the groups was the only one, out of all the groups, who chose badminton and synchronised swimming more than 1% of the time.

This research indicates that the sports that parents would like their children to participate in the most were swimming, soccer, basketball, and volleyball, while Canadian parents (Saskatchewan ministry of tourism, parks, culture and sport, Evaluation Unit, 2008) want their children to participate in hockey, baseball, golf, and curling the most. This can be explained by cultural differences. The sports that parents want their children to participate in least were acrobatics, wrestling, and rowing. A sta-

tistically significant difference was determined between the answers provided by fathers and mothers in relation to the choice of sport. Fathers prefer their children to take part in soccer and swimming, followed by basketball, volleyball and athletics, and would least like their children to participate in acrobatics, wrestling, and orienteering. Mothers would most like their children to take part in swimming, followed by basketball, soccer, and volleyball, and would least like their children to participate in wrestling, acrobatics, orienteering, and rowing. It is interesting to point out that parental interests were almost identical in relation to the introduction of the following sports into the curriculum: acrobatics, badminton, cycling, judo, fitness, karate, basketball, volleyball, wrestling, orienteering, synchronised swimming, skiing, table tennis, archery, taekwondo, tennis, water polo, and rowing. Contrary to the opinions expressed by schoolchildren, as indicated in the results marked in the table of preferences, it would seem that mothers and fathers made almost identical choices, and valued most of the sports similarly. Parents' choices differed in that more mothers than fathers preferred gymnastics, volleyball, swimming, rhythmic gymnastics, and sports dancing, while more fathers than mothers preferred athletics, aikido, and soccer.

The results of this research indicate that 30% of schoolchildren are actively involved in sports, which is a lot less than indicated by the results of Klomsten et al. (2005) regarding Norway, the results of Milanović and Radisavljević (2007) regarding Serbia (58%), and the results of the research conducted in Canada (Saskatchewan Ministry of Tourism, Parks, Culture and Sport, Evaluation Unit, 2008) on a sample of children ages 5 through 17 (79%). A statistically significant difference was determined between the answers provided by boys and girls. One half of the girls included in the sample had never taken part in sports, which is 20% more in comparison with the boys. This is in accordance with the results obtained by Đorđić (2006), Kimm et al. (2002), and Rowland (1999). In contrast, 40% of the boys expressed that they actively take part in sports, which is 18% more in comparison with the girls. The number of those who had stopped participating in sports is equal. Research conducted in Canada also determined that there were significantly more boys involved in sports activities, and that the difference in the number of girls participating in sports rapidly increases between the ages of 13 and 17. In addition, the results of this research are in agreement with the results of the research carried out by Radojević et al. (2011), but not with the results obtained on a sample of schoolchildren from Belgrade (Milanović & Radisavljević-Janić, 2011; Ilić et al., 2012).

This research determined a statistically significant difference between the answers provided by schoolchildren in relation to their engagement in sport and choice of sport. Schoolchildren who actively take part in sports were mostly interested in soccer, basketball, volleyball,

swimming, and handball. Schoolchildren who had stopped participating in sports were mostly interested in soccer, followed by swimming, basketball, volleyball, and skiing, while those who do not take part in sports were mostly interested in soccer, volleyball, swimming, basketball, and karate. These results are somewhat in agreement with the results obtained by Radojević et al. (2011). They indicate that schoolchildren who take part in sports and schoolchildren who had taken part in sports in the past opted for basketball and swimming, while schoolchildren who had never taken part in sports opted for volleyball and basketball. The results of our research are also partly in agreement with the results obtained by Ilić et al. (2012), who determined that schoolchildren who actively take part in sports prefer soccer and basketball, and schoolchildren who had stopped taking part in sports prefer soccer and swimming, while schoolchildren who had never taken part in sports mostly prefer swimming.

However, differences were noted only when the sports ranked in the middle of the list of preferred sports were studied. Schoolchildren who do not take part in sports opted for judo, handball, and water polo, as well as soccer and basketball, to a greater degree than the other two groups. What is especially noteworthy is the difference between the other two groups in relation to aerobics, fitness, gymnastics, volleyball, and swimming. With the exception of swimming, the other sports which are interesting to girls should certainly be borne in mind, considering that girls who do not take part in sports are the most dominant segment of the sample. It is difficult to take swimming into consideration, since most schools in Serbia do not have a pool, and thus it is very difficult to provide conditions for the commencement of swimming classes.

CONCLUSION

In conclusion, it may be said that parents' attitudes can be important in the early phases of a child's development. Parents are the first source of information on sport, and often make decisions on whether the children will begin to take part in sports, when, and in what way. Parents also decide which sport their children will take part in, often disregarding the wishes of the children themselves. This is why it is important to bear in mind the interests and preferences of not only the students but also the parents, so as to ensure that the process of building healthy habits from an early age is as successful as possible. Of course, gender also impacts the process of sport selection. Our findings show both the relationship between the parents' and children's choice of sport and the differences in the preferred sports branches of parents and children in relation to their gender. As a result, parents can be role models and individuals who shape children's opinions and attitudes regarding sports, physical education, and physical activity in general. On the other hand, schools and their staff can

use their authority and behaviour to promote a healthy lifestyle among children. The results of this research indicate that, at the level of the state, only 1/3 of Serbian children in the upper grades of elementary school take part in some sport as a form of additional activity. Most of those who actively take part in sports are boys. Additional research into these conditions is necessary for us to determine potentially motivating measures, since the discovery, study, and understanding of the factors which facilitate or impede children's, and especially girls', participation in physical activities are key for developing strategies, effective interventions, and more effective curricula and programmes. Future research, which might compensate for the limitations of this research, could focus on the following: the differences in children's involvement in sports between regions, the differences in children's involvement in sports between schools in urban and rural areas, the correlation between physical education and grade, the skipping of physical education classes, parents and siblings' previous and present involvement in sports, and the correlation between the socio-economic status of parents and the children's involvement in sports. Perhaps the investigation of motivation for, and pleasure with physical education classes and teachers can also be of importance for detecting possible ways to prevent older students from adopting a permanent sedentary lifestyle.

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РОДНЕ РАЗЛИКЕ У СТАВОВИМА РОДИТЕЉА И ДЕЦЕ ПРЕМА УКЉУЧИВАЊУ РАЗЛИЧИТИХ СПОРТСКИХ ГРАНА У ПРОГРАМ ОСНОВНЕ ШКОЛЕ

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Резиме

Физичко васпитање је у основним школама у Србији обавезан предмет већ од првог разреда. Као последица тога, школа и наставно особље својим институционалним деловањем и ауторитетом, кроз формалне и неформалне елементе наставе, те и кроз план и програм наставе физичког васпитања, могу допринети формирању здравих навика и промовисању здравог начина живота међу ученицима. Ту улогу имају и родитељи, који такође могу послужити као узорци за усвајање пожељних облика понашања, и за формирање мишљења, ставова и навика. Како би процес усвајања навика здравог животног стила био што успешнији и дуготрајнији, важно је познавати интересовања и преференције и родитеља и ученика, али и уважити значај родних разлика, будући да је родна улога једна од првих и основних улога које појединац усваја у раном детињству (већ око треће године). Узорак овог истраживања обухвата 8.002 ученика петог разреда и 5.768 родитеља. Независне варијабле су биле пол и бављење спортом, а зависне варијабле су обухватиле 27 врста спортова. Подаци су обрађени уз помоћ χ^2 и непараметријске статистике. Ученици и родитељи би највише волели да се у наставу уведу фудбал, кошарка, пливање и одбојка, док су најмање заинтересовани за рвање и акробатику. У односу на пол, по питању преференције спорта добијене су статистички значајне разлике и међу ученицима и међу родитељима. Дечаци би највише волели да се у школски програм уведу фудбал, кошарка и пливање, а девојчице би највише волеле да се у програм уведу одбојка, пливање и кошарка. Дечаци су били против увођења ритмичке гимнастике, рвања, аеробика, оријентиринга и синхроног пливања, док су девојчице биле против увођења рвања, ватерпола, веслања и акробатике. Такође, важно је нагласити и да се 50% девојчица обухваћених узорком истраживања никада није бавило никаквим спортом, док код дечака та група чини свега 20% узорка. У критичној категорији оних који се никада нису бавили спортом, највећи број се залаже за увођење фудбала, одбојке, пливања, кошарке и каратеа. Спортови за чије се увођење у школски програм залажу родитељи су пливање, фудбал, кошарка и одбојка. Очеви се више залажу за увођење фудбала, пливања, кошарке, одбојке и атлетике, а мајке се више залажу за увођење пливања и кошарке у школски програм. Добијени подаци могу да помогну професорима физичког васпитања у свакодневном раду, и омогуће им да у одређеном степену, било на часу или кроз секције и систем такмичења, допру и до оних ученица које се иначе не баве физичком активношћу промоцијом оних спортова који су ученицима и њиховим родитељима блиски и пожељни. Такође, комбинацијом спортова које ученици желе и спортова које обавезно прописује школски програм, професори физичког васпитања би могли утицати на ниво мотивације ученика, као и на њихово залагање и активно учешће на часу, посебно на вишим основношколским узрастима када долази до пада мотивације за активно уче-

ствовање на часу физичког васпитања. Такође, информација о родитељским преференцијама пружа индиректан увид у то у којој мери ће ученици имати подршку родитеља за активности које се у школи или ван школе спроводе, што је свакако корисна информација за смернице у даљем раду. Подаци говоре и о присутности високо наглашених родних стереотипа када су одређене врсте спорта у питању, али и о важности отклањања инфраструктурних потешкоћа када је у питању пливање, будући да тренутна расположива инфраструктура, те и наставни план и програм (често као последица тога), не прате жеље ученика и преференције родитеља у довољној мери.

THE EFFECTS OF THE APPLICATION OF INDIVIDUALIZED INSTRUCTION IN TEACHING PROSE TEXTS^a

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Abstract

This paper discusses the possibility of teaching prose literary texts in the first cycle of primary education using individualized instruction in order to highlight its effectiveness in helping students grasp this type of learning content. The conducted experimental research aimed to examine how the application of individualized teaching to the process of teaching prose literary works in the lower grades of primary school contributes to their more complete understanding. The results obtained have shown that the experimental group, which learned the planned teaching units by using the individualized instruction approach achieved significantly better results compared to the control group, which worked in the usual way.

Key words: individualized instruction, prose texts, students' abilities, efficient acquisition of knowledge

ЕФЕКТИ ПРИМЕНЕ ИНДИВИДУАЛИЗОВАНЕ НАСТАВЕ У ОБРАДИ ПРОЗНИХ ТЕКСТОВА

Апстракт

У раду се разматра могућност обраде прозних књижевних текстова у првом циклусу основног образовања применом индивидуализоване наставе како би се указало на њену ефикасност у усвајању ове врсте наставних садржаја. Спроведено експериментално истраживање имало је за циљ да испита како примена индивидуализоване наставе у обради прозних књижевних дела у нижим разредима основне школе доприноси њиховом потпунијем разумевању. Добијени резултати показали су да је експериментална група, која је предвиђене наставне јединице обрађивала приме-

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ном индивидуализоване наставе, постигла значајно боље резултате у односу на контролну групу која је радила на уобичајен начин.

Кључне речи: индивидуализована настава, прозни текстови, могућности ученика, ефикасно усвајање знања

INTRODUCTION

One of the biggest shortcomings of the modern school system is the fact that the student is passive in the process of knowledge acquisition, while the only active factor in that process is the teacher who teaches. Traditional instruction is representative of a “dogmatic-reproductive character - the independence of students is suppressed, they are in the position of passive recipients, they acquire ready-made knowledge from teachers’ presentations or textbooks, they remember and repeat it” (Marinković, 1995, p. 11). Therefore, the passive position of students implies that it is impossible for them be mentally active in order to acquire new knowledge and complete the development of their personality. In such an environment, where the teacher’s verbalism dominates and where he is the transmitter of knowledge, as opposed to being someone who encourages and guides the process, the student is deprived of the opportunity to think actively and creatively. The activation of the students’ thinking process is directly reflected in their independent activity where students rely on their own knowledge and abilities (Stojadinović & Spasić Stošić, 2017). Students learn how to be independent and creative by systematically and gradually placing themselves in a situation where they acquire the necessary knowledge through their own thinking activity (Tasić Mitić & Spasić Stošić, 2014).

THEORETICAL CONSIDERATIONS

One of the crucial tasks of the modern school is to organize instruction in a manner which would result in students being more active than they are now (Đorđević, 2012). This activity must be based on their greater intellectual effort and engagement (Vilotijević, 2008) in order to lead to the ultimate goal, which is the acquisition of applicable knowledge. Only the knowledge acquired by the students’ own independent thinking is permanently embedded in their consciousness (Anderson, 2002). In contrast, the ready-made knowledge that is served to students by teachers by no means encourages the development of logical thinking and reasoning, but rather causes the stagnation of their development (Tasić Mitić, Stojadinović & Malićević, 2020).

The development of logical thinking and reasoning is largely determined by the level of the intellectual, cognitive, and emotional, or, in a word, psycho-physical development of each student. To a large extent, the development of the intellectual foundation of each individual determines the

scope of his/her overall development and the development of their personality as a whole. Therefore, it is necessary to organize instruction in such a way that the learning content, methods and forms are adapted to the individual capabilities of each child (Mijanović, 2009; Stevanović, 2003) in order for the implementation of all learning and extracurricular activities to be, in the true sense of the words, efficient and useful. The learning content for the Serbian language and literature course, as well as the learning content of other subjects, should be adjusted to the abilities of each student so that the level of their mastery of the subject is in accordance with the educational goals and objectives. Moreover, it should be kept in mind that students greatly differ in the amount and type of knowledge they possess, and in their intellectual and other abilities (Lazarević, 2005).

A well-designed implementation of individualized instruction, which is based on adapting the learning topics, methods and forms of teaching to the abilities of students, enables the achievement of expected results and allows students to progress at a certain pace, consistent with their psycho-physical characteristics (Marković, 2005). This innovative work model “implies such planning, organization and overall educational work that starts from the appreciation of the student’s personality, his individual possibilities and potential” (Arsić, Vučinić, 2013, p. 35). Individualized teaching encourages students to use their own strengths in order to maximize their individual potentials (Zhang & Li, 2019). Since individualized instruction provides independence to students (Simić, 2015), the level of student activity is higher, which directly contributes to the modernization of the teaching process. In addition, students’ independent work on a literary text contributes to their training for self-education (Stakić, 2014).

As the art of words, literature can be difficult for children to understand precisely because of its stylistic and linguistic layers, and ambiguity, and the very reception of literary works can be a problem for younger school-age students. With the experimental research we conducted with fourth grade elementary school students, we wanted to examine the understanding of prose literary texts at this age by applying individualized teaching.

METHODOLOGICAL RESEARCH FRAMEWORK

The subject of this research is *the experimental research and study of the efficiency of the usage of individualized instruction in teaching prose literary texts*.

Starting from the insights provided by direct teaching practice, which have shown that students in the lower grades of primary school have certain problems when it comes to the reception and understanding of prose literary texts, which, in turn, implies that teachers encounter problems when teaching those texts, we defined the goal of this research:

Investigate how the application of individualized instruction in teaching prose literary works in lower grades of primary school contributes to their better understanding.

The experiment aimed to find out whether the application of individualized instruction in teaching prose literary texts affects students' thought activation and yields better learning results, i.e. a higher level of students' academic achievement.

Research hypotheses:

1. We assume that there are statistically significant differences regarding the level of understanding of prose literary texts between students who learn the aforementioned texts using individualized instruction and students who learn them in the traditional way;
2. We assume that students will show progress in the degree of understanding of prose literary texts in relation to their grade in the final test of the Serbian language course after the application of the experimental program;
3. We assume that students will show progress in the degree of understanding of prose literary texts compared to the general achievement in the final test after the application of the experimental program;
4. We expect that students who have learned the prose literary texts by applying individualized instruction will achieve better results in the final tests when compared to the results of the initial testing.

Considering the nature of the research problem, the descriptive and experimental method were used in the work. Of the available research techniques, testing (tests for initial and final measurement) was used, and the χ^2 -square test, Student's t-test, ANOVA analysis and Cohen's eta square were used for statistical data processing. The initial test at the beginning of the IV grade and the final test, given at the end of the IV grade, were used as research instruments. The test for the initial measurement consisted of ten questions, mostly of the closed type. With it, we tried to check the fourth-grade students' level of prior knowledge about the prose literary texts they had studied in previous grades. The questions in the test for the initial measurement are diverse, both in terms of concept and difficulty. The test for the final measurement consisted of ten questions, mostly of the closed type, related to the contents of the prose literary texts that the students worked on in the fourth grade.

The research was conducted in two primary schools in Vranje (Primary School Vuk Stefanović Karadžić and Primary School Dositej Obradović). In both schools, all fourth-grade classes were included, from which a control and experimental group of students was formed. Therefore, the experimental research included 240 fourth-grade students. The

experimental group consisted of 120 students, with the control group consisting of the same number of students. The number of male and female participants was almost equal. The groups were uniform in terms of the number of participants, as well as in terms of gender (each respondent in the experimental group has his/her counterpart in the control group, which corresponds to him/her in terms of gender, academic success and grade in the Serbian language course in the previous grade.

The sample included 122 fourth-grade boys and 118 fourth-grade girls. The number of male participants is minimally higher, without a statistically significant difference compared to the number of female participants. The average grades in the Serbian language course were very similar in both groups, with exceptional sample homogeneity ($CV < 30$). Namely, the focus was specifically on finding a counterpart in the control group for each respondent from the experimental group in regards to their grade, so that the groups would be uniform in this respect as well.

At the beginning of the school year, the experimental and control group did an initial test in order for us to gather information about the students' level of prior knowledge when it comes to prose literary texts. Moreover, the control group learned the planned teaching units in the field of literature in the traditional way – that is, the teachers prepared and taught the Serbian language and literature using the usual teaching methods and forms. In contrast, the experimental group learned the same teaching units based on previously modelled preparations, whereby, as an experimental factor, individualized instruction was introduced.

At the end of the experimental program, the control and experimental groups took the final test with the aim of determining the level of understanding and experience of the learned prose literary texts. In agreement with the class teachers in the aforementioned schools, and relying on the valid Curriculum for the fourth grade of primary school, the following teaching units were selected for the purpose of implementing the experimental program:

1. *The Most Valuable Endowments* – folk legend;
2. *The Story of a Boy and the Moon* – Branko V. Radičević;
3. *Oldana's Gardens* – Grozdana Olujić;
4. *Sleeping Beauty* – Brothers Grimm;
5. *Cinderella* – a folk tale; and
6. *White and yellow girl* – Pearl Buck.

Table 1 shows the number of points that the participants achieved in the initial test. Participants from the control group achieved a higher average number of points on five questions in the test (1, 3, 6, 7 and 9), and participants from the experimental group had a higher average number of points on questions 2, 4, 5, 8 and 10. The p-value obtained indicates that both groups of participants achieved uniform results with approximately similar achievements, and this difference is not statistically

significant for any of the ten questions, i.e. on no question did any group score a statistically significantly higher number than the other group. On average, the control group scored more points per question than the experimental group, but the results were not statistically significantly higher, which means that *the groups were uniform*.

Table 1. Average number of points in the initial test for the experimental and control groups

	Experimental group			Control group			t-test	p
	X	SD	Cv	X	SD	Cv		
Question 1	1.65	1.50	90.83	1.83	1.47	80.58	-0.913	0.362
Question 2	1.80	1.48	81.99	1.70	1.49	87.81	0.522	0.602
Question 3	1.83	1.47	80.58	2.10	1.38	65.74	-1.494	0.137
Question 4	1.78	1.48	83.42	1.70	1.49	87.81	0.391	0.696
Question 5	2.00	1.42	71.01	1.83	1.47	80.58	0.938	0.349
Question 6	1.70	1.49	87.81	1.83	1.47	80.58	-0.653	0.514
Question 7	1.80	1.48	81.99	1.95	1.44	73.69	0.798	0.426
Question 8	2.20	1.33	60.56	2.13	1.37	64.44	0.430	0.668
Question 9	1.70	1.49	87.81	1.85	1.46	79.17	0.786	0.433
Question 10	2.08	1.39	67.05	2.05	1.40	68.36	0.139	0.890
Average value	1.85	1.45	79.31	1.90	1.44	76.88	0.094	0.508

By comparing the experimental group participants' grades in the Serbian language course with the number of points for all questions (Table 2), and the total number of points in the initial test, *no statistically significant positive correlation was found between the number of points for all questions and the total number of points, except for question 2, where a statistically significant correlation was found* ($p < 0.05$). As for the control group, there was no statistically significant correlation between the number of points on all questions and the total number of

Table 2. Correlation between the number of points in the initial test and the participants' grade in the Serbian language course

Correlation between the grade in the Serbian language course and the number of points in the test	Experimental group		Control group	
	r	p	r	p
Question 1	0.050	0.585	0.064	0.486
Question 2	0.183	0.045	0.046	0.615
Question 3	0.089	0.336	0.038	0.678
Question 4	0.062	0.500	0.146	0.112
Question 5	0.047	0.613	0.115	0.211
Question 6	0.103	0.264	0.115	0.211
Question 7	0.102	0.266	0.031	0.734
Question 8	0.046	0.620	0.002	0.984
Question 9	0.129	0.159	0.009	0.925
Question 10	0.060	0.512	0.063	0.496
Total points	0.087	0.190	0.063	0.345

points and the grade in the Serbian language course. By comparing the correlations in the E and C group, it can be said that *correlation levels are more significant in the experimental than in the control group*.

ANALYSIS AND INTERPRETATION OF RESULTS

Literary text interpretations followed the initial test, and then the final test, which referred to those learning contents, was given. Table 3 shows the results of the final test. Compared to the results of the initial test, *on the final test, the participants from the experimental group achieved a significantly higher average number of points on all questions, with a significant difference compared to the control group ($p < 0.001$), except on questions number 2 and 3 where the p -value was $p < 0.05$, and on question number 8, where the p -value obtained was higher than the critical value ($p > 0.01$). Thus, we can conclude that the participants achieved approximately the same result on question number 8*. The participants in the control group had good results on this question as well. Namely, in the eighth question, the respondents were asked to answer what a folk legend is, by circling one of the provided options. Moreover, the average value of the total number of points won in the final test for the experimental group is statistically significantly higher than the number of points won by the control group ($t = 8.746$; $p = 0.000$). The following table provides an overview of the number of points the respondents achieved in the final test.

Table 3. Average number of points won in the final test in the experimental and control group – 4th grade

	Experimental group			Control group			t-test	p
	X	SD	Cv	X	SD	Cv		
Question 1	2.40	1.21	50.21	1.80	1.48	81.99	3.450	0.000
Question 2	2.15	1.36	63.14	1.73	1.49	86.33	2.310	0.022
Question 3	2.40	1.21	50.21	2.03	1.41	69.68	2.214	0.028
Question 4	2.40	1.21	50.21	1.90	1.45	76.41	2.903	0.004
Question 5	2.53	1.10	43.55	2.00	1.42	71.01	3.202	0.001
Question 6	2.53	1.10	43.55	1.83	1.47	80.58	4.176	0.000
Question 7	2.33	1.26	54.11	1.80	1.48	81.99	2.966	0.003
Question 8	2.25	1.30	57.98	1.98	1.43	72.34	1.557	0.121
Question 9	2.48	1.14	46.25	1.95	1.44	73.69	3.130	0.002
Question 10	2.60	1.02	39.39	2.08	1.39	67.05	3.329	0.001
Average value	2.41	1.19	49.86	1.91	1.45	76.11	2.924	0.018

By comparing the participants' grades in the Serbian language course with the number of points on all questions (Table 4) and the total number of points in the final test, *the experimental group showed a statistically significant positive correlation between the number of points on*

questions 2, 6 and 10, and total number of points ($p < 0.05$). As for the control group, there was a statistically significant positive correlation with the grade from the Serbian language course on question 10 ($p < 0.01$). By comparing the correlations in the experimental and control groups, it can be said that *the levels of the correlations' significance are higher in the experimental than in the control group.*

Table 4. Correlation between the number of points in the final test with the participants' grade in the Serbian language course

Correlation between the grade in the Serbian language course and the number of points in the test	Experimental group		Control group	
	r	p	r	p
Question 1	0.013	0.886	0.061	0.505
Question 2	0.221	0.015	0.119	0.127
Question 3	0.046	0.617	0.120	0.190
Question 4	0.020	0.830	0.090	0.331
Question 5	0.138	0.133	0.132	0.151
Question 6	0.210	0.021	0.106	0.247
Question 7	0.125	0.175	0.147	0.110
Question 8	0.076	0.409	0.143	0.118
Question 9	0.099	0.283	0.132	0.150
Question 10	0.243	0.007	0.264	0.004
Total points	0.119	0.048	0.131	0.193

By comparing the total number of points on the initial and final tests, the Student's t-test of dependent samples showed that the experimental group showed a *statistically significant increase in the average value of points won* ($p < 0.001$), while the control group showed *no significant change in the number of points won* ($p > 0.05$). Based on the calculated Cohen's square (0.95), we can conclude that *there is a very significant difference between the results on the initial and final tests in the experimental group, while no significant difference in achievement was observed in the control group.*

Table 5. Average number of points won in the initial and final test by the participants from the experimental and control group

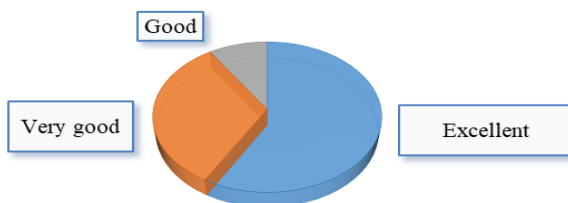
Group	Initial test			Final test			t-test	p
	X	SD	CV	X	SD	CV		
Experimental	18.53	1.80	9.72	24.05	1.36	5.67	-7.692	0.000
Control	18.95	1.54	8.15	19.08	1.16	6.06	-0.327	0.751

The significant increase in the achievements of the experimental group can be attributed to the effect of the experimental factor, i.e., the independent variable - individualized instruction, whose usage in teaching prose literary texts causes increased motivation to learn, encourages the

mental and emotional engagement of students, and contributes to the development of their individual abilities. With this, we have *fully confirmed the fifth hypothesis of the research, which states that individualized instruction will significantly contribute to a deeper emotional experience, and a more complete reception of prose works.*

The success that the participants in the experimental group achieved on the final test and the statistically significant difference in relation to the results of the participants in the control group indicate that the use of this model of teaching should be implemented in schools.

Considering that, in general, the participants in the experimental group were more successful than the participants in the control group, we were interested in who was the most successful, i.e. who had benefited most from individualized instruction to fully understand prose literary genres: excellent, very good or good students. Of the 240 participants (Chart 1), the largest number were students with excellent academic success (58%), which in the overall score is more than the number of students with very good and good academic success combined (43%). The number of excellent students was statistically more significant than the number of very good and good students ($p < 0.001$).



Graph 1. Structure of 4th grade participants in relation to their general academic success

In both the experimental and control group, a significantly higher number of participants had excellent academic results compared to the participants with very good and good academic success ($p < 0.001$). From the data presented in the table of expected schedules (Table 6), *a statistically significant difference in the structure of the observed groups in relation to*

Table 6. Structure of 4th grade participants in relation to their general academic success

Academic success	Experimental group			p	Control group			p
	Number of respondents	%	χ^2		Number of respondents	%	χ^2	
Excellent	71	56.67	48.05	0.00	69	57.50	39.35	0.00
Very good	40	34.17			38	31.67		
Good	09	9.17			13	10.83		
Total	120	100.00			120	100.00		

academic success was observed ($p < 0.001$). Namely, in both groups, the number of excellent students was statistically more significant compared to the participants with very good and good academic success ($p < 0.001$).

During the initial measurement, we used the ANOVA test and the consequent Post Hoc analyses. During the initial test with the experimental group, it was found that the number of points won statistically significantly differed between the participants with different academic success ($F = 8.473$, $p < 0.05$), *with the best results achieved by the participants with excellent academic success*, which was statistically significantly higher than it was with participants with very good ($p < 0.001$) and good academic success ($p < 0.05$). *Participants with very good academic success scored, on average, a lower number of points compared to participants with good academic success, but this difference can be attributed to a random factor and is not significant.*

As for the control group, the number of points also differed statistically significantly in relation to the participants' academic success ($F = 16.549$, $p < 0.001$). Post Hoc analysis found that *participants with excellent academic success had statistically significantly better results compared to the participants with very good ($p < 0.001$), and good academic success ($p < 0.001$)*, which was expected given that prior knowledge significantly contributes to future success. Participants with very good academic success had approximately the same results compared to those with good academic success, so we can conclude that there are no significant differences between these groups.

These results lead us to the conclusion that modes of teaching which are organized in the traditional way, without taking into account the individual preferences and abilities of students, do not contribute to the students' development, and do not provide enough opportunity for further progress. This particular shortcoming of traditional instruction can be successfully overcome by an adequate application of individualized instruction.

Table 7. Average number of points won in the initial test by the experimental and control group in relation to the academic success of the 4th grade participants

Acc success	Experimental group			Control group			t-test	p
	X	SD	Cv	X	SD	Cv		
Excellent	20.49	1.96	9.56	21.66	1.23	5.68	-1.599	0.131
Very good	15.39	2.49	16.21	15.03	2.94	19.54	0.295	0.771
Good	17.40	3.85	22.11	16.59	3.42	20.62	0.498	0.625

By comparing the number of points won on the initial test taken by the experimental and control groups, it was found that *both groups won the same average number of points. Thus, we can conclude that there is no*

statistically significant difference between the groups in their achievements on the initial test ($p = 1.000$).

By using the ANOVA analysis and subsequent Post Hoc tests for the results of the final test taken by the experimental group, it was found that the number of points differed statistically significantly between participants with different academic success ($F = 5.931$, $p < 0.01$), *with the best results achieved by participants with excellent academic success – these results were better when compared to the results of the participants with very good and good academic success ($p < 0.01$). There was no statistically significant difference between the results of the subjects with very good and good academic success, although the participants with very good academic success achieved better results in the final test.*

Therefore, teaching prose literary texts with the help of modeled preparation yielded better results among the participants in the experimental group as a whole. Similarly, in relation to their academic success, all three categories of students (excellent, very good and good) achieved far better results in the final test when compared to the participants from the control group.

Within the control group, the differences among the participants in relation to their academic success are even more pronounced ($F = 27.100$, $p < 0.001$). Post Hoc analysis showed a *statistically significant difference between participants with excellent academic success, whose achievements were significantly higher than the achievements of their peers, and the participants with very good and good academic achievements ($p < 0.001$). There was no significant difference in achievement between the participants with very good and good academic success.* This shows that traditional instruction does not allow students with a poorer performance to achieve their maximum within the limits of their abilities.

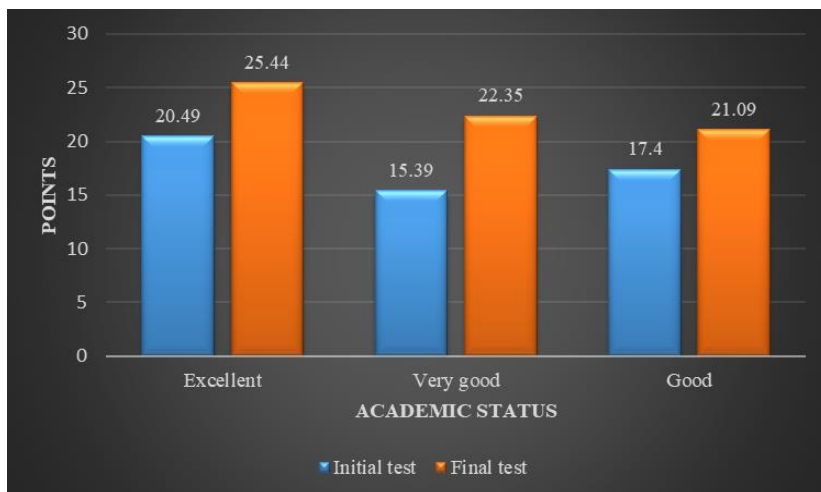
The analysis of the number of points won in the initial and final tests via the Student's t-test of dependent samples (Table 7 and Table 8) found that, *in the experimental group, the average achievements of participants with excellent and very good academic success statistically significantly improved ($p < 0.001$). While this improvement was slightly lower with participants with good academic success, it was still significant when compared to the results of the initial test ($p < 0.05$).*

As for the control group, no statistically significant change in the number of points won in the final test was observed in comparison with the results of the initial test. A decrease in achievement was observed in participants with good academic success, while a slight increase in achievement was observed in participants with very good academic success, who were motivated to prove that they could do better in such an environment.

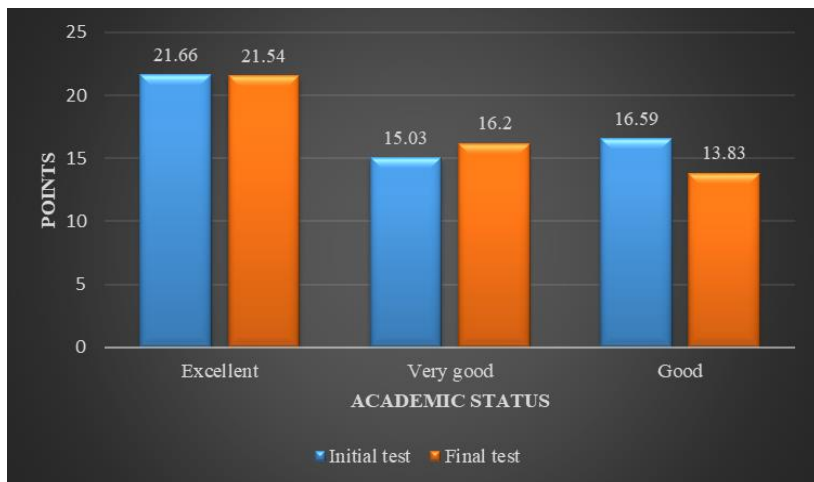
Table 8. Average number of points won in the final test by the experimental and control groups in relation to the academic success of the 4th grade participants

Acc. success	Experimental group			Control group			t-test	p
	X	SD	Cv	X	SD	Cv		
Excellent	25.44	1.92	7.54	21.54	1.85	8.58	6.982	0.000
Very good	22.35	2.65	11.86	16.20	2.28	14.08	5.719	0.000
Good	21.09	3.83	18.14	13.83	2.94	21.26	4.796	0.000

When the results achieved by the experimental and control groups in the initial and final tests are compared, it can be noticed that the participants in the experimental group with excellent and very good academic success had the best scores, with students with very good academic success increasing their number of points by almost 50% on the final test in comparison to their results on the initial test. This shows that teaching prose texts using individualized instruction is very useful for this category of students since their motivation to learn is at a high level, which is confirmed by the results obtained. It is interesting to mention that the participants in the control group with good academic success had a decrease in achievement in the final test compared to the initial test, which once again shows that the traditional way of teaching prose literary works, which does not take into account the individual differences and abilities of each student, does not affect students with lower academic achievement, and does not encourage their progress and development.



Graph 2. Comparative overview of the achievements of the experimental group in relation to their academic success – 4th grade



Graph 3. Comparative overview of the achievements of the control group in relation to their academic success – 4th grade

The Student’s t-test of independent samples found that the experimental group won a statistically significantly higher average number of points in the final test than the control group ($p < 0.05$).

CONCLUSIONS

The conducted experimental program included the introduction of individualized instruction as the experimental factor. The initial and final measurements in the experimental and control groups found that the participants in the experimental group won, on average, a higher number of points in the final test compared to the participants in the control group. While in the experimental group there was a statistically significant increase in the average number of the total points won in the final test compared to the initial test, in the control group there was a statistically significant decrease in the total number of points. It should be noted that both groups were almost uniform after the initial measurement. This confirms our first hypothesis, which states that there are statistically significant differences in relation to the level of understanding of prose literary texts between students who learn these texts using individualized instruction and students who learn them in the traditional way.

The participants in the experimental group achieved better results in the final measurement in relation to their grade in the Serbian language course. Individualized instruction is especially beneficial for students with poorer academic success because it is based on adapting the content, methods and forms of teaching to their individual abilities. Therefore, the second hypothesis, which states that students will show progress in the

understanding of prose literary texts in relation to their grade in the Serbian language course on the final test after the application of the experimental program, was confirmed.

The use of individualized instruction in teaching prose texts has allowed students with lower academic achievement to have better results and make significant progress. This is especially true for students with very good academic success, who achieved statistically significantly better results in the final test when compared to their results on the initial test. This confirms our third hypothesis, which states that the students' results on the final test following the application of the experimental program will show progress in their level of understanding of prose literary texts in relation to their general achievement in the Serbian language course.

Teaching literary works by using the individualized instruction approach has proved to be very effective. The participants in the experimental group scored significantly better on the final test than they did on the initial test. Therefore, we can confirm that this model of teaching significantly increases the students' motivation to learn, encourages the mental and emotional engagement of students, and contributes to each student's progress in accordance with their abilities. Thus, our fourth hypothesis, which states that students who have learned prose literary texts by applying individualized instruction will achieve better results in the final tests compared to the results of the initial testing, was also confirmed.

Based on the aforementioned, we can conclude that individualized instruction can greatly facilitate the understanding of prose literary works, especially for students with lower academic achievements who do not have the opportunity to express their individual abilities and interests when learning within the traditional instruction model.

By applying individualized teaching through modeled teaching units, we tried to enable students to achieve a more complete understanding and experience of prose literary texts. Thereby, we attempted to eliminate the rigidity and patternism of the traditional way of processing literary works. In addition, we wanted to arouse the students' curiosity and desire to independently discover the magical world of literary art, and to present them with possible ways of independently acquiring new knowledge that will be permanent and functional. Therefore, with this experiment, we wanted to check whether applying the model of individualized knowledge acquisition in the field of literature is justifiable and effective.

The knowledge gained through this research should be a kind of incentive for teachers – it should provide them with guidelines on the basis of which they can continue to build their own style of encouraging and nurturing the independent work of students through the application of individualized teaching in the field of literature. The success that the re-

spondents in group E achieved on the final test and the statistically significant difference compared to the success of the respondents in group C indicate that the application of this teaching model should be encouraged in schools.

The results of this research point towards the need to implement an individualized model of teaching when processing prose literary texts in the classroom. Particularly significant are the results that point to a visible improvement in the achievements of students with good academic success.

Therefore, teaching which is carried out in the traditional way, without taking into account the individual preferences and abilities of students, does not contribute to their development and does not provide enough opportunities for further advancement. Such shortcomings of traditional teaching can be successfully overcome by an adequate application of individualized teaching.

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ЕФЕКТИ ПРИМЕНЕ ИНДИВИДУАЛИЗОВАНЕ НАСТАВЕ У ОБРАДИ ПРОЗНИХ ТЕКСТОВА

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Резиме

Прозна књижевност са својом стилско-језичком вишезначношћу, и специфичном композицијом и тематиком ученицима млађих разреда основне школе неретко представља изазов у смислу правилног разумевања и емоционалног доживљавања садржаја које обрађују. Како би се олакшало проучавање прозних књижевних текстова и њихово разумевање, неопходно је променити приступ њиховој обради. Традиционални приступ, који је најприсутнији у актуелном школском систему, подразумева прилагођавање садржаја, метода и облика рада тзв. „просечном” ученику. Међутим, чињеница да се ученици међусобно веома разликују по својим интелектуалним, сазнајним, психофизичким и другим спо-

собностима намеће потребу за применом индивидуализоване nastave као иновативног модела рада који се темељи на прилагођавању nastave могућностима сваког појединачног ученика.

Експериментално истраживање које је спроведено у четвртој разреди основне школе имало је за циљ да испита ефекте примене индивидуализоване nastave у обради прозних књижевних текстова на овом узрасту. Контролна група је одабране прозне текстове обрађивала на уобичајен начин, док је експериментална група путем моделованих припрема обрађивала ове текстове применом индивидуализоване nastave. Добијени резултати показали су да је експериментална група постигла значајно већи успех у нивоу разумевања одабраних прозних текстова у односу на контролну групу. То потврђује потребу за имплементацијом индивидуализоване nastave приликом обраде прозних текстова на млађем школском узрасту.

TRADE OPENESS FUNCTIONING TO PROMOTE ECONOMIC PROSPECTS: AN ANALYSIS OF THE NEW EU MEMBER STATES

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Abstract

Given the developments in economic theory so far, the European Union (EU) accession process is believed to bring significant benefits to newcomers, especially in terms of fostering their economic growth, which is induced by abolishing import tariffs and other trade barriers, intensifying trade flows and ensuring a more efficient usage of resources. Although empirical evidence on these correlations is mixed, many in the new EU member states and in candidate countries hope that EU membership will pave the way towards their economic prosperity, which would ensure a meaningful reduction in the income gap between new and old EU members. Accordingly, trade liberalisation, which implies lower transaction costs, increased specialisation, scale economy, and competitive pressures, has become a priority, especially for the accessing economies which are traditionally less open in comparison to the economies which first joined the EU. This study aims to assess the impact of trade openness, measured through the dynamics of exports and imports, on the economic growth of the last three member countries to join the EU (Romania, Bulgaria and Croatia) by employing panel data for the period before and after their accession (1997-2017). The results of the study confirm the expansion of the sample countries' trade flows after the accession, as well as a positive correlation between the dynamics of trade flows and gross domestic product (GDP) growth. Still, it can be concluded that the exploitation of the positive effects of trade openness is conditioned by the level of the countries' pre-accession economic progress and other determining variables.

Key words: international trade, economic growth, market liberalisation, transition economies

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ОТВОРЕНОСТ ТРГОВИНЕ У ФУНКЦИЈИ ПОСПЕШИВАЊА ЕКОНОМСКИХ ИЗГЛЕДА: АНАЛИЗА НОВИХ ЗЕМАЉА ЧЛАНИЦА ЕВРОПСКЕ УНИЈЕ

Апстракт

Приступање Европској унији (ЕУ) подразумева многобројне погодности за нове земље чланице које се, између осталог, огледају у подстицању економског раста првенствено укидањем царина и других трговинских баријера, али и интензивирањем трговинских токова и ефикаснијом употребом ресурса. Иако емпиријска истраживања ових корелација нису јединствена у својим закључцима, нове земље чланице ЕУ и земље кандидати сматрају да ће чланство у ЕУ отворити пут ка економском просперитету и тиме умногоме смањити разлику у нивоу развијености између нових и старих земаља чланица ЕУ. У складу са тим, трговинска либерализација, која имплицира смањење трансакционих трошкова, повећану специјализацију, економију обима и позитивне ефекте конкуренције на тржишту, постаје један од приоритета земаља које приступају ЕУ, пре свега због њихових традиционално затворенијих привреда у поређењу са привредама старијих чланица. Мерењем динамике извоза и увоза, циљ истраживања је сагледавање ефеката отворености привреде на економски раст земаља чланица које су последње приступиле ЕУ (Румунија, Бугарска и Хрватска). Временски оквир истраживања обухвата период између 1997. и 2017. године, односно период пре и после приступања Европској унији. На примеру анализираних земаља, резултати истраживања потврђују експанзију трговинских токова након приступања ЕУ, као и позитивну корелациону везу између трговинских токова и раста бруто домаћег производа. Ипак, треба имати у виду да су позитивни ефекти отворености привреде условљени извесним нивоом економског прогреса пре самог приступања ЕУ, као и другим детерминантама.

Кључне речи: међународна трговина, економски раст, трговинска либерализација, земље у транзицији

INTRODUCTION

Recent developments in economic theory argue that international trade plays an important role in the economy of each individual country, and that diminishing trade barriers and increasing openness to trade can significantly support the boost in the economic growth of a country.

From a theoretical perspective, there are good reasons to believe that greater opportunities for international trade give rise to higher production and productivity, since producers and consumers gain better access to specialised products with lower barriers to international trade. Lower barriers may also foster international competition, forcing businesses to lower their mark-ups and to better exploit returns to scale. Moreover, endogenous growth theories usually emphasise the dynamic gains of increased openness that arise due to the fact that businesses are able to tap into foreign knowledge and ideas, and to speed up their pace of innovation through international exchange and contacts. In addition, these theories implicitly take into account the dynamic gains of trade,

such as larger foreign direct investment (FDI) flows and better integrated product and capital markets. International trade in goods and services and large inflows of FDI may facilitate the transfer of ideas, modern technologies, and business practices, contributing in that way to higher productivity, investment and growth (Afonso, 2001).

Since some of the main characteristics of European integration are a sharp decline in trade barriers and, ultimately, the elimination of tariffs among the EU and EFTA nations, it can be concluded that EU integration is expected to have a positive impact on the economic growth of its member states. The EU accession process is believed to bring significant benefits in terms of trade integration, due to the abolition of import tariffs and a more efficient use of resources. Therefore, expanding trade through improvements in competition policy and specialisation has become a priority, especially for accessing economies which are traditionally less open in comparison to EU economies.

Even though numerous studies have clearly, and unsurprisingly, shown that European integration caused a large expansion of its member countries' trades, especially with each other, some still believe that the effects of enlargement tend to be limited for the current members of the EU, and that not all such trade is welfare-improving (Viner, 1950). Due to the fact that, according to Eurostat statistics, nearly 70% of the new member states' exports go to the EU, but only 4% of the EU's exports currently go to the new member states, the consensus of economists is that gains are likely to be proportionately much larger for new EU members.

Many in the new EU member states and candidate countries hope that EU membership will pave the way towards their economic prosperity, due to the fact that, according to their perspective, previous entrants fared pretty well after their accession. The results of empirical research focusing on the accessing countries mostly support this optimism. EU membership is estimated to increase trade by roughly 56%. In addition, a one percent increase in openness (i.e. the ratio of trade to GDP) is expected to expand output by about 0.7% in the long run. Combining these two effects, new EU members can, on average, experience an increase in their real income equalling roughly 39% in the long term (Lejour et al., 2006). These results show that EU integration could significantly help in reducing the income gap between new and old member states.

Nevertheless, not everyone has benefited from the new trade opportunities to the same extent. The effects of trade liberalisation on the individual accessing countries vary widely. To a large extent, this variation depends on the quality of a country's institutions, and the combination of its openness and the intensity of its trade with the EU. Therefore, the members of the EU, and especially new entrants, are faced with a challenge. They must be capable of starting an endogenous growth process by investing into physical and human capital, and maintaining a high

growth rate even if there are strong pressures of new competition and adjustment. To achieve that, new entrants need more investments, which would lead to further improvements in productivity, skills, and technology transfer, stable legal and economic frameworks provided by their EU membership, and assistance from EU funds (World Economic Forum, 2017).

In this context, this study provides a comparative analysis of the impact of different indicators of market openness on the economic states of the latest EU members (Romania, Bulgaria and Croatia) and their policy creation. The research sample analysed in this empirical study consists of the panel data for the selected transition economies, covering the period between 1997 and 2017. In addition, the study reveals the main challenges and prospects of the market convergence process, suggesting that the positive effects of market openness are conditioned by the level of a country's initial GDP per capita and other explanatory variables, such as the industrial and technological development of a country. The findings of this paper have allowed us to obtain a better understanding of the relation between economic growth and international trade as regards the new EU members. Furthermore, the findings of this paper represent a worthwhile lesson for the current EU candidate countries, which should find a solution for the optimal utilisation of the benefits of the market liberalisation process, so as to achieve sustainable economic growth.

LITERATURE REVIEW

Although existing literature provides significant theoretical support to the positive association between international trade and economic growth, their relationship is still an open and a debated issue among scholars. Empirical studies on the benefits of trade openness, measured using various trade policy indices, provide mixed evidence based on different samples of countries.

A range of empirical studies that investigated this relationship in the context of EU integrations documented a positive correlation between these two variables, showing that economies open to trade have higher GDP and grow much faster (Romer, 1990; Edwards, 1997, Barro, 2003, Bugarčić & Veselinović, 2020). For instance, Baldwin and Seghezza (1996) argue that countries which were members of the European Community (EC) between 1971 and 1990 experienced faster total factor productivity (TFP) growth than other European countries, such as those that were part of EFTA. TFP growth is assumed to arise from two sources: domestic (innovation) and international (the ability to adopt and use foreign innovations). The former is a function of the level of human capital, while the latter is assumed to be a function of a catching-up period whose length is connected to the country's economic state - the poorer the country is, the longer the catching-up period is. More open and less

developed countries rely on the international channel for TFP growth more than other countries. Furthermore, some authors suggest that the founding members of the EC experienced the highest growth rates. They also argue that European integration affects growth through physical capital formation (integration-induced, investment-led growth) and knowledge creation (integration induced, technology-led growth).

In a study of the EEC-6 countries, Italianer (1994) utilised integration-depicting variables based on the trade flows in the period between 1961 and 1992. The author identified the important growth effects of both regional economic integration and general levels of openness. Within a similar context, Haveman (2001) found that both being a free trade area or customs union member and being open in general are growth-enhancing. Accordingly, Wacziarg and Welch (2003) showed that GDP growth rates in countries which liberalised their trade regimes after 1950 rose by an average of 1.5 percentage points compared with the pre-liberalisation period. The investment-to-GDP ratio also increased by 1.5 to 2%, and the trade-to-GDP ratio increased by an average of 5%. An influential article by Jeffrey Sachs and Andrew Warner (1995) went so far as to argue that countries which are open to trade experience an unconditional convergence with the income levels of rich countries. Similarly, Ben-David and Kimhi (2000) show that increasing trade openness in new EU members means increasing the rate of growth convergence. In addition, the authors provide evidence that increased exports, especially exports from poorer to wealthier countries, are related to an increase in the rate of income convergence between them. They also argue that there was very little change in trade-to-GDP ratios prior to trade policy liberalisation in Europe, whereas a significant increase in trade occurred after the liberalisation, with a tendency to remain at the new, higher level. Dohrn, Milton and Radmacher-Nottelmann (2001) discuss several implications of FDI inflows in EU member economies. The authors argue that FDI brings new technology transfers, skills and governance improvement, which were particularly important for the new member candidates who experienced a surge in FDI inflows in the 1990s, as their accession to the EU became more probable. About one half of those inflows came from contemporary EU members, and one half of that level represented FDI inflows from Germany. A positive correlation between economic growth and FDI per capita was detected. However, the causation direction is still difficult to confirm. Baldwin and Seghezza (1996) based their analysis on a growth model which emphasises the link between trade barriers and the demand for capital. The results showed that domestic trade barriers, as well as foreign barriers, tend to decrease investment, and consequently have a negative impact on growth.

Imports are one aspect of the impact of international trade on economic growth that was less often considered. In that vein, Lee (1995), Humpage (2000) and Afonso (2001) stressed that imports, especially imports of capital goods, help the transfer of technology from more devel-

oped countries to less developed countries, and encourage the pursuit of new products and production processes, which foster productivity and competitiveness, and shorten the period needed for less developed economies to catch-up to the leaders. Imports also directly and indirectly promote employment and domestic competitiveness, which can lead to the reduction of essential production inputs (Shirazi & Manap, 2005).

Finally, some recent literature also confirms that open economies indeed experience faster growth (Andersen & Babula, 2008, Mihuț & Luțaș, 2014, Bakari & Mabrouki, 2017, Skare & Rabar, 2017). This is not surprising, since leading international policy makers from the World Bank, IMF, WTO, and OECD have ensured that integration into the world economy is the surest way to prosperity. For instance, on a sample of 45 industrialised and emerging countries, Bussiere and Fratzscher (2007) point out that trade integration could produce faster growth, but only in the medium and long term. Nugent (2004), however, believes that the enlargement of EU offers very limited economic gains for the original EU-15, while, at the same time, offering proportionately more economic opportunities for new EU members. This is explained by the fact that new EU members potentially have much more to obtain from their membership, since they start from a lower economic base and are geographically smaller than the majority of the EU-15 countries. Nugent (2004) supports this opinion by claiming that the main economic reason for seeking membership in the EU/EC has been the success of the EU/EC in terms of promoting trade, economic growth, and prosperity, which are highly desirable to emerging European economies. Fetahi-Vehapi et al. (2015) aimed to investigate the impact of trade openness on economic growth in 10 South East European (SEE) countries in the period between 1996 and 2012. The study examined the relationships among: human capital, gross fixed capital formation, foreign direct investment, and labour force. Their findings indicate that positive effects on economic growth are conditioned by the initial income per capita. It was also discovered that trade openness is more beneficial to countries with a higher level of initial income per capita. Trade openness was also found to favour the countries with a higher level of FDI and gross fixed capital formation.

The results of other studies, however, speak against the existence of significant growth effects related to EU membership. For instance, on a sample of data pertaining to 17 OECD countries in the period between 1950 and 1990, the study conducted by Landau (1995) found that there was no statistically significant difference between the growth of EC members and the growth non-member countries. This would suggest that there is no long-term growth effect associated with the membership in the EC. Accordingly, Stanisic et al. (2017) who conducted a panel regression for the new EU members utilizing the Index of trade freedom of the Heritage Foundation as a proxy for the trade openness revealed that the in-

crease in the index was associated with the lower real GDP growth rates. Similarly, utilising the panel data for 23 OECD countries, Vanhoudt (1999) found no positive or negative growth effects in EC members in comparison with non-member OECD states. Using an OLS estimation of a pooled data set, Brada and Mendez (1988) found that membership in the EC positively affects the investment rates of its member states, but provided no proof of integration-growth linkage. Through time-series analysis and static and dynamic data models for EU member states, Badinger (2001) found no permanent increase in growth rates related to economic integration within the EU. Badinger, however, identified important level effects – without economic integration, the real GDP per capita for the EU member states would be, on average, 20% lower. On a sample of panel data for 20 countries in the period between 1960 and 1999, Brodzicki (2003) found no statistically significant effect related to EU membership. In contrast, the length of membership in the EU and the scale of the EU economy were found to have a positive impact on the growth performance of its member states. Similarly, in the specification of a panel data model with fixed effects, Crespo-Cuaresma (2002) found that the length of membership positively affects the growth rates of the member states. These authors further claim that economic integration within the EU led to asymmetric, convergence-stimulating effects.

The general conclusion that could be drawn from this overview of empirical literature is that the obtained results are very mixed, and sensitive to the use of different econometric approaches, the choice of data samples and explanatory variables.

METHODOLOGY AND RESEARCH QUESTIONS

The aim of this research is to analyse the level of international trade; more specifically, this paper aims to analyse the exports and imports of the last three countries to join the EU – Romania, Bulgaria and Croatia, and to examine the interdependence between their trade openness and economic growth. The analysed period covers panel data given for a period of 21 years, or the period before and after the EU accession of these countries (Romania and Bulgaria joined the EU in 2007, while Croatia joined in 2013). The information base of this research is the World Bank data for the analysed EU countries and the defined period. The methods used in the analysis are descriptive statistics, correlation and comparative analysis, and benchmarking.

The purpose of the analysis is to examine the impact of EU membership on foreign trade by comparing the countries' exports and imports before and after their EU accession. Furthermore, the analysis highlights the importance that foreign trade openness has for a country's economic growth, measured by the interdependence between exports and imports, and GDP growth (annual %).

In order to achieve this objective, this paper is based on the following research questions:

- (1) has EU accession changed the flow of international trade in Romania, Bulgaria and Croatia;
- (2) do the analysed EU countries deviate from the EU average in terms of international trade; and
- (3) to which extent does the international trade of the analysed new EU members contribute to economic growth, measured by the interdependence between exports and imports on the one side, and GDP growth on the other side.

RESULTS AND DISCUSSION

Based on the previously defined research questions, the results of this research are grouped into three categories:

- (1) Analysis of the international trade of Romania, Bulgaria and Croatia in the period preceding and following EU accession;
- (2) Benchmarking analysis of exports and imports between the analysed new EU member countries and the EU average; and
- (3) Correlation analysis of international trade and GDP growth for Romania, Bulgaria, Croatia, and the EU.

Analysis of the International Trade of Romania, Bulgaria and Croatia in the Period Preceding and Following EU Accession

The EU is the world's biggest trader, accounting for more than 15% of the world's exports and imports. Free trade among its members is one of the EU's founding principles, which, at the same time, contributes to the liberalisation of world trade.

Given the plethora of benefits that the free movement of people, goods, services and money provides in the EU as the world's largest single market, there is a need to examine the potential changes in countries' international trade before and after EU accession. Therefore, Table 1 provides the data on exports and imports of goods and service as a percentage of GDP for the last three countries to join the EU – Romania, Bulgaria and Croatia, as well as for the European Union as a whole.

Table 1. Exports and imports of goods and services (% of GDP) for Romania, Bulgaria, Croatia and the European Union, in the period between 1997 and 2017

Country Indicator	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Bulgaria	50.11	43.09	43.17	36.47	35.15	33.91	34.68	41.27	42.86	47.32	52.38
Croatia	31.32	29.49	30.46	36.51	38.66	37.67	38.89	39.45	39.30	39.66	39.00
Romania	27.99	22.86	27.71	32.72	32.96	35.22	34.54	35.64	32.91	32.06	28.42
EU	30.75	30.95	31.13	34.44	34.38	33.62	32.93	34.33	35.67	37.78	38.39
Bulgaria	37.28	36.06	47.79	41.82	44.54	41.95	44.94	52.51	57.63	64.54	71.21
Croatia	44.23	36.28	36.51	39.55	42.18	45.55	46.33	45.47	45.43	46.40	46.27
Romania	34.75	30.62	32.22	38.00	40.54	40.82	41.97	44.58	43.02	43.99	42.36
EU	29.05	29.72	30.39	34.19	33.61	32.19	31.81	33.08	34.77	37.13	37.57

Table 1. (Continued)

Country Indicator	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bulgaria	52.54	42.33	50.18	59.07	60.80	64.65	65.01	64.11	63.98	66.33
Croatia	38.48	34.52	37.63	40.32	41.52	42.80	45.31	48.23	49.01	51.26
Romania	26.25	26.55	32.56	37.05	37.46	39.75	41.19	41.01	41.33	41.44
EU	38.97	34.75	38.45	41.11	42.31	42.43	42.79	43.36	43.16	44.64
Bulgaria	72.30	50.61	53.03	58.69	63.97	65.06	65.96	63.96	59.67	64.80
Croatia	46.52	38.24	38.06	40.78	41.04	42.34	43.39	45.86	46.19	49.10
Romania	39.17	32.77	38.75	42.64	42.44	40.52	41.63	41.64	42.23	43.57
EU	38.60	33.66	37.51	40.03	40.27	39.78	39.95	39.85	39.71	41.19

Source: The World Bank

Note: the marked years represent the accession date of the selected EU countries

Figures 1 and 2 graphically illustrate the values of exports and imports as a percentage of GDP from Table 1.

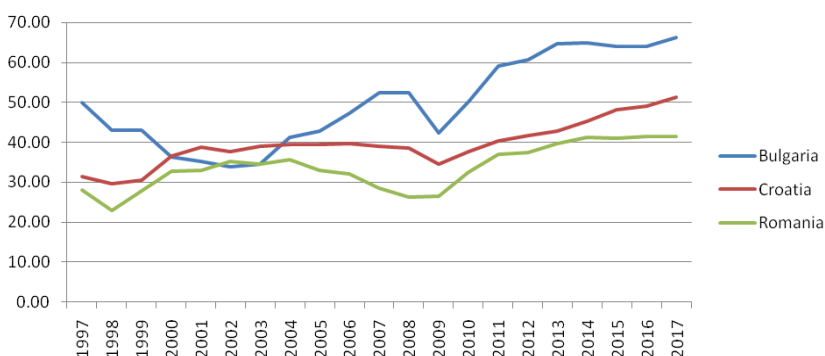


Figure 1. Exports of goods and services (% of GDP) for Romania, Bulgaria and Croatia in the period between 1997 and 2017

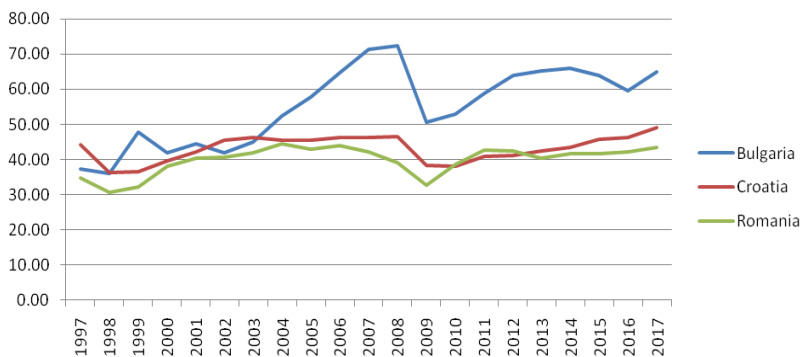


Figure 2. Imports of goods and services (% of GDP) for Romania, Bulgaria and Croatia in the period between 1997 and 2017

Based on Table 1 and Figure 1, in the analysed 21-year period, the highest value of exports is recorded in Bulgaria, followed by Croatia and Romania, except in the period between 2000 and 2004, when there was a noticeable intersection. After slight fluctuations and a slow growth in the period preceding EU accession, the value of exports in Romania and Bulgaria was recovered, with a further continuous exponential rise, after EU accession in 2007 and the global financial crisis in 2009, which affected global trade. The same applies to Croatia, before and after its EU accession in 2013.

As for the import values given in Table 1 and Figure 2, Bulgaria recorded the biggest share of import in GDP, followed by Croatia and Romania. Putting aside the effects of the global financial crises, all three analysed countries continued to increase their import values after their EU accession.

Benchmarking Analysis of Exports and Imports between the Analysed new EU Member Countries and the EU Average

In order to benchmark Bulgaria, Romania and Croatia among each other, and in relation to the EU, in accordance with international trade, Figures 3 and 4 illustrate the data for exports and imports as a percentage of GDP.

Based on Figure 3, Bulgaria is the country with the biggest share of exports as a percentage of GDP among the analysed new EU members, but also compared to the EU average. On the other hand, exports in Romania were lower in comparison to the EU, as well as compared to Bulgaria and Croatia. In the analysed period, Croatia recorded almost the same export values as the EU average, with only slight fluctuations.

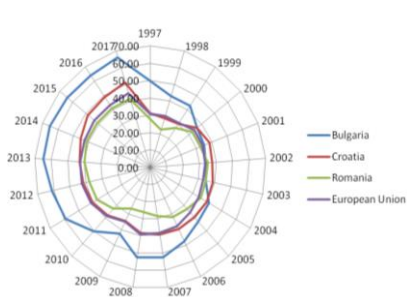


Figure 3. Benchmarking of exports of goods and services (% of GDP), Romania, Bulgaria, Croatia and the EU in the period between 1997 and 2017

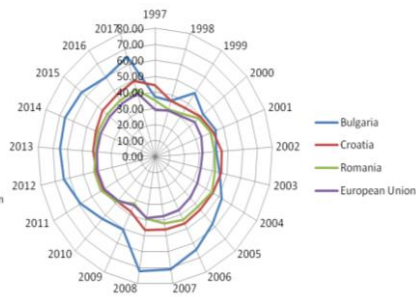


Figure 4. Benchmarking of imports of goods and services (% of GDP), Romania, Bulgaria, Croatia and the EU in the period between 1997 and 2017

As for the imports of goods and services as a percentage of GDP, all three new EU member countries have imports higher than the EU – in Bulgaria, this deviation is significantly higher.

Correlation analysis of international trade and GDP growth for Romania, Bulgaria, Croatia and the EU

Correlation analysis serves to determine the degree of interdependence between different indicators. The most commonly used measure of a linear relationship between indicators is Pearson's correlation coefficient.

The strength of a correlation is determined by the value of Pearson's coefficient. Therefore, if Pearson's correlation coefficient amounts to a value between 0.10 and 0.29, the correlation is low; if Pearson's correlation coefficient amounts to a value between 0.30 and 0.49, the correlation is medium; and if Pearson's correlation coefficient is above 0.50, the correlation is high (Soldic-Aleksic, 2015). However, before Pearson's correlation coefficient is applied, the existence of a relationship between indicators should be determined based on the concept of statistical significance. Accordingly, this relationship can be positive when the direction change of one variable follows the change of other variable(s) in the same direction, or it can be negative in the case of variable changes in opposite directions.

Table 2 illustrates the correlation analysis between international trade and GDP growth for the analysed countries in the period between 1997 and 2017.

Table 2. Correlation analysis between GDP growth and export & import for the last three joined EU countries (Bulgaria, Romania and Croatia) and the EU (1997-2017)

Correlation	Pearson Correlation	Coefficient of determination	*Sig. (2-tailed)
Bulgaria: GDP growth-Exports	0.138	1.90%	0.000
GDP growth -Imports	-0.328	10.76%	0.000
Croatia: GDP growth -Exports	0.087	0.76%	0.009
GDP growth -Imports	-0.648	41.99%	0.268
Romania: GDP growth -Exports	0.351	12.32%	0.034
GDP growth -Imports	-0.742	55.06%	0.080
EU: GDP growth -Exports	0.109	1.19%	0.000
GDP growth -Imports	-0.106	1.12%	0.000

Note: *Correlation is significant at the 0.01 level (2-tailed).

Source: Prepared by the authors (SPSS Statistics)

Based on the results of the correlation analysis provided in the previous table, there is a positive correlation between GDP growth and exports in Bulgaria, Romania, Croatia and the EU in the period between 1997 and 2017. Accordingly, the increase in the exports of the analysed countries leads to the increase in GDP growth. The highest correlation is recorded in Romania, indicating a medium correlation, while the correlation for Bulgaria, Croatia and the EU as a whole is low. Conversely, the correlation between imports and GDP growth is negative, since lower imports cause a rise in the GDP growth rate.

Table 5 shows the results of descriptive statistics for international trade (exports and imports) in Bulgaria, Croatia, Romania and the European Union for the period between 1997 and 2017.

Table 5. Descriptive statistics of the international trade in Bulgaria, Croatia, Romania and the EU (1997-2017)

Correlation	Minimum	Maximum	Mean	Std. Deviation
Bulgaria: Exports (% of GDP)	33.91	66.33	49.9719	11.17351
Imports (% of GDP)	36.06	72.30	55.1581	11.13930
Croatia: Exports (% of GDP)	29.49	51.26	39.4995	5.68422
Imports (% of GDP)	36.28	49.10	43.1295	3.72316
Romania: Exports (% of GDP)	22.86	41.44	33.6962	5.58130
Imports (% of GDP)	30.62	44.58	39.9157	4.04438
EU: Exports (% of GDP)	30.75	44.64	37.4448	4.55369
Imports (% of GDP)	29.05	41.19	35.9076	3.92606

Source: Prepared by the authors (SPSS Statistics)

The results in Table 5 show that the minimum share of exports and imports in GDP for the analysed countries ranges between 22.86 (exports

in Romania) and 36.28 (imports in Croatia), while the maximum share of exports and imports in GDP scores the values between 41.19 (imports in the EU) and 72.30 (imports in Bulgaria).

CONCLUSION

Given the theoretical propositions and empirical evidence, it can be concluded that the trade openness of an economy may have a positive impact on economic growth, due to lower trade and transaction costs, increased specialisation, scale economy and competitive pressure. Being accompanied with a sharp decline in trade barriers, the EU integration process is therefore believed to bring significant benefits to the economic performance and the growth rate of accessing countries. However, the potential of utilising such trade liberalisation benefits is determined by the level of the initial GDP per capita, and other explanatory variables, such as the industrial and technological development of a country.

According to the results of the performed empirical analysis, Bulgaria, Romania and Croatia, as new EU member countries, experienced an increase in international trade even before joining the European Union, which is the world's biggest trader and largest single market. However, after their EU accession, the value of their exports and imports continued to grow at a higher rate, except during the period of the global financial crisis. As the latest EU members, these three countries do not deviate much from the level of exports and imports in the EU, although Bulgaria recorded a slightly higher share of imports and exports in GDP compared to the other two analysed countries.

Therefore, the results of the conducted correlation analysis confirm the fact that a country's exports contribute to the enhancement of its economic growth. Namely, the results of the correlation analysis confirmed a positive correlation between exports and economic growth, indicating that increased export values increase GDP growth, and vice versa. Conversely, considering the negative correlation between imports and GDP growth, increased import values lower the rate of a country's economic growth.

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ОТВОРЕНОСТ ТРГОВИНЕ У ФУНКЦИЈИ ПОСПЕШИВАЊА ЕКОНОМСКИХ ИЗГЛЕДА: АНАЛИЗА НОВИХ ЗЕМАЉА ЧЛАНИЦА ЕВРОПСКЕ УНИЈЕ

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Резиме

Приступање Европској унији (ЕУ) подразумева многобројне погодности за нове земље чланице које се, између осталог, огледају у подстицању економског раста првенствено укидањем царина и других трговинских баријера, али и интензивирањем трговинских токова и ефикаснијом употребом ресурса. Иако емпиријска истраживања ових корелација нису јединствена у својим закључцима, нове земље чланице ЕУ и земље кандидати сматрају да ће чланство у ЕУ отворити пут ка економском просперитету и тиме умногоме смањити разлику у нивоу развијености између нових и старих земаља чланица ЕУ. Сходно томе, трговинска либерализација, која имплицира смањење трансакционих трошкова, повећану специјализацију, економију обима и позитивне ефекте конкуренције на тржишту, постаје један од приоритета земаља које приступају ЕУ, пре свега због њихових традиционално затворенијих привреда у поређењу са привредама старијих чланица. Ипак, треба имати у виду да су позитивни ефекти отворености привреде условљени нивоом БДП-а по становнику пре приступања, као и другим детерминантима попут достигнутог индустријског и технолошког развоја.

Полазећи од циља истраживања који се огледа у мерењу динамике увоза и извоза не би ли се сагледао ефекат отворености привреде на економски раст земаља чланица које су последње приступиле ЕУ (Румунија, Бугарска и Хрватска), резултати извршене емпиријске анализе потврђују да су Бугарска, Румунија и Хрватска, као нове земље чланице ЕУ, искусиле пораст међународне трговине и пре чланства у Европској унији. Међутим, истраживање је показало да је након приступања ЕУ вредност њиховог извоза и увоза наставила да расте бржим темпом, изузимајући године глобалне финансијске кризе. Као најновије чланице ЕУ, ове три земље не одступају много од нивоа извоза и увоза у ЕУ, иако Бугарска бележи нешто већи удео увоза и извоза у БДП-у у поређењу са Румунијом и Хрватском.

Резултати спроведене корелационе анализе су стога потврдили да отвореност привреде ка међународној трговини доприноси јачању њеног економског раста. Наиме, резултати корелационе анализе указали су на позитивну корелацију између међународне трговине (извоза и увоза) и економског раста. Другим речима, резултати су указали на то да повећање вредности извоза и увоза повећава БДП по становнику, и обрнуто.

DETERMINANTS OF WOMEN'S EMPLOYMENT IN THE REGION OF SOUTHERN AND EASTERN SERBIA: AN ECONOMETRIC APPROACH

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Abstract

During time, women's participation in the labour markets all over the world has increased. However, gender differences in the level of employment still exist, especially in underdeveloped and developing countries. Since empirical evidence shows that a higher degree of women's employment has many positive effects on the economy, it is of great importance for such countries' governments to create mechanisms for increasing it. These mechanisms are especially important for the Republic of Serbia, since women's employment is still lagging behind men's employment. On the interregional level, the gender discrepancies in employment are even larger, which slows down the development of the country as a whole. In order to create effective strategies and mechanisms which will increase the degree of women's employment in such regions, it is of great importance to discover which factors currently determine whether women will be employed or not. Since the problem of women's unemployment is particularly noticeable in the Region of Southern and Eastern Serbia, this paper aims to provide an analysis of the basic factors of women's employment in this region, so as to raise awareness about these factors and shed light on possible employment policies that could be designed accordingly. These policies are expected to enhance the economic development of this region and the country as a whole. For this purpose, primary research was conducted on a sample of 678 women. The results of the study indicate that age, educational attainment, household income, place of residence, and having children ages 7 through 18 represent significant factors that determine women's employment.

Key words: women, employment, labour market participation, factors, econometric approach

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ДЕТЕРМИНАНТЕ ЗАПОСЛЕНОСТИ ЖЕНА У РЕГИОНУ ЈУЖНЕ И ИСТОЧНЕ СРБИЈЕ: ЕКОНОМЕТРИЈСКИ ПРИСТУП

Апстракт

Током времена, број жена на тржиштима рада широм света се повећао. Међутим, родне разлике у нивоу запослености и даље постоје, посебно у неразвијеним земљама и земљама у развоју. Будући да емпиријски докази показују да већа запосленост жена умногоме позитивно утиче на привреду, од велике је важности да владе таквих земаља створе механизме за њено повећање. Ови механизми су посебно значајни за Републику Србију, јер у њој запосленост жена и даље заостаје за запосленошћу мушкараца. На међурегионалном нивоу, родне разлике у запошљавању су још веће, што успорава развој земље у целини. У циљу креирања ефикасних стратегија и механизма који ће обезбедити раст стопе запослености жена у оваквим регионима, од велике је важности идентификовати факторе који тренутно одређују да ли ће жене бити запослене или не. Будући да је проблем незапослености жена посебно изражен у Региону Јужне и Источне Србије, овај рад има за циљ да анализира основне факторе који утичу на запосленост жена у овом региону, како би се подигла свест о овим факторима и расветлиле могуће политике запошљавања које би се у складу са њима могле осмислити. Очекује се да ће ове политике допринети економском развоју овог региона, те и земље у целини. У ту сврху спроведено је примарно истраживање на узорку од 678 жена. Резултати студије указују да старост, степен образовања, деца старости између 7 и 18 година, приход домаћинства и место пребивалишта представљају значајне факторе који одређују запосленост жена.

Кључне речи: жене, запосленост, учешће на тржишту рада, фактори, економетријски приступ

INTRODUCTION

One of the most significant changes in the labour market in the last century was the increasing number of women in the workforce. Data shows that women's labour force participation rates (of women ages 15 through 64) in the Republic of Serbia have recorded a constant growth since 2012, going from 54.2% to 63.0% in 2021. The decline in this percentage was inevitable in 2020, due to the coronavirus pandemic. When it comes to the European Union (EU-27), a similar state of affairs is evident. The female labour force participation (FLFP) rate was recorded to have gone from 64.5% to 68.5% in the same ten-year period (Eurostat, 2022).

As women's participation rate in the labour market increased, many positive effects were generated. Many studies found that there is a positive interrelationship between a higher degree of women's employment and the economic development of a country (Cavero-Rubio et al., 2019). Other studies showed that an increased FLFP rate compensates for the costs of an ageing population via positive fiscal effects (Bosch & Van der Klaauw, 2012). Some research also showed that the inclusion of skilled women in the economy expands the talent pool of the country,

which enables the economy to be more productive, diversified and innovative (OECD, 2017).

However, the data on women's participation in employment relationships is still not favourable. They participate less than men, both quantitatively and qualitatively – women have a smaller share in the workforce and the employment relationship, and generally have a lower educational attainment and fewer skills (Psacharopoulos & Tzannatos, 1989).

Since the increase of women's participation in employment relationships has many positive effects on the economy, and since their current participation is not satisfactory, it is of great importance that every country undertake measures to increase it. This is especially important for the enhancement of the development of developing countries. However, the first step in the process of creating effective measures should be the identification of the factors which currently determine whether women will be employed or not.

The Republic of Serbia is one of the countries in which women's participation in the labour force is still not favourable. Data shows that their participation rate in 2019 was 59.7%, while men's labour force participation rate was 74.0% (Eurostat, 2022). There are some other discouraging trends aside from this unfavourable data. For example, it was found that, during the process of transition, if employed, a Serbian woman would hold a job in sectors characterised by low pay, such as the public sector or the textile industry (Ivanović & Kufenko, 2020). Furthermore, it was discovered that one of the discouraging factors for women entering the Serbian labour market was, and still is, the discrepancy in earnings which makes men better-paid (Stanković, 2016). Ognjenović and Branković (2013) found that small children in the household, marital status, and opportunity costs are the main disabling factors of FLFP, while education is an enabling factor that almost linearly increases the participation rate.

Since the Republic of Serbia belongs to the group of developing countries,¹ and since much empirical research shows that there is a positive interrelationship between a higher degree of women's employment and the economic development of a country (Cavero-Rubio et al., 2019), increasing women's participation in employment could be beneficial for its faster development. This is especially important for its underdeveloped regions, such as the Region of Southern and Eastern Serbia, which has the lowest participation rate in the country's GDP (13.7%) (Statistical Office of the Republic of Serbia, 2021). At the same time, this region boasts the lowest percentage of unemployed women (43.17%) (Statistical Office of the Republic of Serbia, 2020). This is also a region that belongs to the

¹ According to the World Bank (2021), GDP per capita in Serbia in 2020 was 7,673 US\$.

‘underdeveloped south’, as compared to the ‘developed north’ (Stamenković et al., 2021).

Based on the above, the main goal of this paper is to identify the factors that determine women’s employment in the Region of Southern and Eastern Serbia. The results could serve as a basis for the country’s creation of an effective regional policy for stimulating women’s participation in the labour market of this region, which would enhance the development of this region and have a positive influence on the country’s development as a whole. To achieve these goals, empirical research was conducted on the territory of the Region of Southern and Eastern Serbia, and the results of this research are presented in this paper.

The paper is structured as follows: the section following the Introduction provides a review of literature and the development of hypotheses related to women’s participation in the labour market; the third section of the paper discusses the methodology of research applied in this study; the fourth section details the results of the study; the fifth section of the paper consists of the discussion of the results and their practical implications; and the final section of the paper provides concluding remarks.

LITERATURE REVIEW

FLFP has been the area of interest of many authors so far. Consequently, many aspects of this phenomenon have been studied. Some authors investigated the phenomenon of FLFP from a structural econometric modelling point of view, some from a financial incentives perspective, and some from the standpoint of a life cycle decision-making process (Euwals et al., 2007). On the other hand, some authors had a more qualitative approach, focusing on the historical analysis of women’s changing life courses (Goldin 2004; Goldin 2006 in Euwals et al., 2007; Ehsan, 2015).

The phenomenon of FLFP is also the subject of many theories, among which are the labour-leisure theory, the neoclassical theory, and the labour-seeking theory. According to the labour-leisure theory, a woman’s decision on whether or not to join the labour market depends on the relationship between the expected market wage and the value women give to the time they spend on unpaid work in their households (Tasseven et al., 2016). Brožová (2015) further noted that the neoclassical theory states that the abilities shared by workers should be reciprocally valued with the same wage. Finally, the labour-seeking theory is based on the assumption that neither employees nor firms have all the necessary information about the labour market. Consequently, acquiring additional information about the market causes additional costs related to the sacrifice of free time (Tasseven et al., 2016). Therefore, women calculate what the better option is and base their decisions about their employment status on those calculations.

Influential factors defining women's employment status have also been the area of interest of many authors. Therefore, numerous factors have been identified. Some of them include differences in economic development (Verick, 2014), technological progress (Greenwood et al., 2016), policies aimed at increasing the participation of women in the workforce (Pignatti, 2020), education levels (Cho & Cho, 2015), age (Anaman & Kassim, 2006; Lee et al., 2008; Chen et al., 2014), marital status (Chen & Hamori, 2010; AlAzzawi & Hlasny, 2019), household income (Mincer, 1962; Li et al., 2020; Xin et al., 2021), and family structure (Mincer, 1962).

When it comes to the level of a country's economic development, many studies found that FLFP is highest in some of the poorest and richest countries in the world. At the same time, it is lowest in countries with average national incomes (Verick, 2014). Therefore, it can be concluded that the relationship between female participation rates and GDP per capita follows a U-shape curve globally. Although recent data, obtained on a sample of 169 countries, shows weak evidence of a U-shaped relationship between the log of GDP per capita and the FLFP rate, a U-shaped relationship between these two factors still exists (Verick, 2014).

Technological progress also has a favourable impact on the employment of women. More specifically, households are impacted by technological progress which, in turn, reduces the amount of work needed at home, thus allowing more women to enter the labour market (Greenwood et al., 2016).

One of the factors that has lately gained great significance in stimulating women's entry into the labour market is the creation of policies aimed at increasing women's participation in the workforce. This factor is especially important in countries with highly educated women and an ageing population (Pignatti, 2020).

When it comes to education, Cho and Cho (2015) state that, as the level of education increases, the comparative advantage of women in the labour market increases as well, which means that women choose to spend less time on housework.

Bianchi et al. (2012) analysed the family structure, which is also a factor influencing FLFP. They claim that, historically, women were the bearers of unpaid domestic work, while men were those who provided financial resources for the family. According to the traditional workforce model, women have a comparative advantage in domestic work and consequently concentrate on housework, while men gain a comparative advantage in earning wages and focus on the labour market (Bianchi et al., 2012). However, in recent times, the family structure has changed, and more women are included in the labour market, building successful careers.

The inclusion of women in the labour market has both economic and social significance. From the economic aspect, the economic efficiency of the country improves with the inclusion of women in the labour

market. From the social aspect, the increase in women's participation has a favourable effect on women's bargaining power, and, thus, on their empowerment (Sarkar et al., 2019; Nazier, 2020). Additionally, minimising the earnings risk within the family becomes the role of female labour supply (Attanasio et al., 2005). In particular, if a household is faced with the primary earner losing his job, the woman, as a secondary earner, can provide security and stability for the family. It was revealed that a higher degree of women's participation in the labour market has a positive fiscal and demographic influence as well. Namely, a higher degree of women's participation in the workforce contributes to the fiscal sustainability of states, which are under more and more significant pressure due to an ageing society (Euwals et al., 2007).

Development of Hypotheses

Besides the aforementioned, there are many others factors influencing FLFP. For the purpose of this paper, these additional factors will serve as the basis for hypothesis development.

In that vein, Lee and his associates (2008), for example, believe that a woman's age is a proxy for possible work experience, and is thus expected to increase the likelihood of employment, but only up to a certain age. Chen et al. (2014) state that the age of women is an important factor to consider, since women of different ages have different experience, work abilities, and family accountabilities. Anaman and Kassim (2006) also state that the probability of a woman entering the labour market increases with age, and then decreases with older age (quadratic function). Based on the above, one of the hypotheses to be tested in this paper is as follows:

H1 – The probability of a woman's employment increases with a woman's age, but only up to a certain age, at which point it decreases.

According to human capital theory (Mincer, 1958), a higher level of education leads to better outcomes in the labour market (Alam & Mamun, 2016). Numerous studies found that higher levels of education bring higher incomes, making labour market participation more appealing (Chen, & Hamori, 2010; Chen et al., 2014; AlAzzawi & Hlasny, 2019). Generally speaking, the impact of education can be seen in two ways (Psacharopoulos & Tzannatos, 1989). Since education can be presented as an investment in human capital, a woman is motivated to work to recoup the costs of that investment. On the other hand, an educated woman is more motivated to enter the labour market and, due to her higher potential for earnings, the opportunity costs of leisure increase. In brief, a higher level of educational attainment is expected to increase the likelihood of a woman's employment. Therefore, another of the hypotheses to be tested in this paper is as follows:

H2 – A woman's education has a positive impact on the probability of a woman's employment.

Several studies have reported that the likelihood of a woman's employment increases if the woman is married (Chen & Hamori, 2010; AlAzzawi & Hlasny, 2019). The main reason for this could be the fact that marriage usually involves the expansion of the family, which leads to the necessity of more financial resources. Additionally, Fernández and Wong (2014) have found that a married woman who faces a higher risk of divorce is motivated to work because she faces different consumption preferences from her partner during marriage, and because it is more likely that she will have higher costs of living in case of a divorce. Consequently, another research hypothesis of this paper is:

H3 – Marriage will have a positive impact on the probability of a woman's employment.

The cost of raising children is also a factor that has great potential to influence a woman's decision to enter the labour market. Namely, having children was seen as the major obstacle to continuous female employment and career development in many cases, especially in those societies where there is no access to affordable public childcare services. However, the provision of affordable public childcare services has the potential to reduce a mothers' opportunity costs and motivate the employment of women (Lee et al., 2008).

There is evidence to prove that the trends of reduced fertility rates and women delaying motherhood have improved the FLFP rate. Namely, some researchers found that university-educated women tend to delay motherhood until the completion of regular education, which later gives them a more favourable position in the labour market (Bratti, 2003). Preschool children represent a greater burden for women and the household income, since most women are responsible for caring for the children due to the lack of high-quality and affordable childcare. Having children of preschool age has been shown to reduce the likelihood of a woman's participation in the labour market (AlAzzawi & Hlasny, 2019; Xin et al., 2021). Conversely, the sole impact of having school-age children has not been determined. Some studies state that school-age children require less attention from their mothers, and that mothers get more free time and can decide to work due to the compulsory nature of primary education (Adair et al., 2002). AlAzzawi and Hlasny (2019) revealed that having school-age children has had a positive impact on the FLFP in Egypt, but a negative impact in Jordan. Therefore, the expected impact of having children depends on the age of the children. Accordingly, the following two hypotheses were developed:

H4 – Having children younger than six will have a negative impact on the probability of a woman's employment;

H5 – Having children ages 7 through 18 will have a positive impact on the probability of a woman's employment.

If household income, or wealth, increases, women can afford more free time, which causes a reduction in labour supply known as the substitution effect (AlAzzawi & Hlasny, 2019). A large number of studies indicate that the greater the wealth, or income, of a household, the less likely a woman is to be employed (Li et al., 2020; Xin et al., 2021). Thus, the next hypothesis to be tested is as follows:

H6 – Higher household income (excluding the woman's income) has a negative impact on the probability of a woman's employment.

Some studies suggest that women are more likely to be employed in urban areas than they are to be employed in rural areas (Giuliani & Duvander, 2016; Sarfraz et al., 2021). Giuliani and Duvander (2016) suggest that women in urban areas have greater job opportunities, access to better jobs, and better childcare opportunities. Sarfraz et al. (2021) found that an urban place of residence predicts decent job prospects for female employees. Therefore, bearing in mind migratory trends, which favour the urban areas in the Republic of Serbia, and the demographic deprivation trends present in Serbian villages (Kuzmanović et al., 2020), the following hypothesis will be tested:

H7 – An urban place of residence has a positive impact on the probability of a woman's employment.

METHODOLOGY

The Context of this Research

The Republic of Serbia is a country in which the employment rate of the population older than 15 years was 49.1% in 2020. Men account for 55.6%, and women account for 44.4% of employed individuals (Statistical Office of the Republic of Serbia, 2020). The Region of Southern and Eastern Serbia is characterised by more unfavourable data since the employment rate of women in 2020 was 43.2%, while the employment rate of men was 56.8% (Statistical Office of the Republic of Serbia, 2020). The low employment proportion of women is partly a consequence of the unfavourable development of the labour market during the transition process and lagged privatisation, when there was a significant decline in the employment rate of women (Stanković et al., 2015). Specifically, in 2002, the ratio of male to female participation rates was 1.3, and the ratio of female to male unemployment rates was 1.5 (World Bank, 2004).

Data Collection and Sample Characteristics

This empirical research was conducted in the Region of Southern and Eastern Serbia. The female population of the researched region con-

sists of 488,767 women aged between 18 and 65, according to the 2011 Census (Statistical Office of the Republic of Serbia, 2019). The sample frame of this research comprised Facebook social groups that bring together almost 21,000 women from the Region of Southern and Eastern Serbia. The data was collected by the application of the convenience sampling method, through an online survey using the Google forms online tool. The survey was distributed to the respondents in the period between January and May 2019. The sample consists of 678 women of working age, and its structure is summarised in the following table.

Table 1. Sample characteristics

Characteristic		Number	Percentage
Age range	18-25	85	12.54
	26-35	321	47.34
	36-45	151	22.27
	46-55	96	14.16
	56-65	25	3.69
Employment status	Employed	476	70.21
	Unemployed	202	29.79
Education	Primary	20	2.95
	Secondary	233	34.37
	Bachelor	223	32.89
	Master	178	26.25
	Doctorate	24	3.54
Marital status	Married	472	69.62
	Not married	206	30.38
Children 0-6	Yes	246	36.28
	No	432	63.72
Children 7-18	Yes	163	24.04
	No	515	75.96
Monthly household income (excluding woman's income) (in RSD)	0-20,000	252	37.17
	20,001-40,000	160	23.60
	40,001-60,000	141	20.80
	60,001-80,000	49	7.23
	80,001-100,000	33	4.87
Place of residence	> 100,000	43	6.34
	Urban	522	76.99
	Rural	156	23.01
Total		678	100.00

Source: Authors' calculation

Research Variables and Instruments

Before defining the methodology for the estimation of the binary dependent variable (female employed or not employed), the independent variables were selected and defined based on available research. A number of the studies identify age, education, fertility and household income

as the basic factors of FLFP (Becker & Becker, 2009; Bütikofer, 2013; Chen et al., 2014). Additionally, a woman's decision to enter the labour market may be influenced by her place of residence. As a result, the following variables are included in the model: age, education, marital status, children under the age of 6, children ages 7 through 18, household income, and area of residence (Table 2).

Table 2. Summary of the variables

Code	Description
Dependent	
Y_t	Female employment status =1 if a female is employed =0 if a female is not employed
Independent	
AGE	Age of the respondents (adults aged 18 through 65)
AGEQ	The square of the age of the respondents
ED2	Secondary educational attainment =1 if the respondent has secondary educational attainment =0 if the respondent has no secondary educational attainment
ED3	Basic academic studies educational attainment =1 if the respondent has basic academic studies attainment =0 if the respondent has no basic academic studies attainment
ED4	Master's academic studies educational attainment =1 if the respondent has basic master studies attainment =0 if the respondent has no master academic studies attainment
ED5	Doctoral academic studies educational attainment =1 if the respondent has doctoral academic studies attainment =0 if the respondent has no doctoral academic studies attainment
MarStat	Marital status =1 if the respondent is married =0 if the respondent is not married
Children6	Having children under the age of 6 =1 if the respondent has children under the age of 6 =0 if the respondent has no children under the age of 6
Children18	Having children aged 7 through 18 =1 if the respondent has children aged 7 through 18 =0 if the respondent has no children aged 7 through 18
HouseholdIncome	Monthly household income (excluding woman's income) in RSD
Residence	Place of residence of respondents =1 if the woman lives in an urban area =0 if the woman lives in a rural area.

Source: Authors

Analyses and Procedures

A binary probit model was used to determine the main factors of female employment in the Region of Southern and Eastern Serbia. What distinguishes the probit model from the standard linear model is the nonlinear relationship between the dependent variable and the independent variables. Furthermore, the dependent variable in this model is the binary variable with two possible outcomes: the female is employed (the binary variable has a value of one) or the female is unemployed (the binary variable has a value of zero). The mathematical formulation of the probit model can be expressed by the following equation:

$$P(Y_i = 1) = P(\alpha_0 + \sum_{j=1}^k \alpha_j x_{ij} + \varepsilon_i \geq 0) = F(\alpha_0 + \sum_{j=1}^k \alpha_j x_{ij}) \quad (1)$$

where $P(Y_i = 1)$ is the probability that the female is employed, which corresponds to the likelihood that the disturbance term will have a value higher than the negative value of the deterministic part of the linear probability model, and F is the cumulative distribution function of the standard normal distribution (Krznar, 2004). More specifically, the probit model can also be expressed by the following equation:

$$\begin{aligned} P(Y_i = 1) &= \frac{1}{\sqrt{2\pi}} \int_{-\infty}^{\alpha_0 + \sum_{j=1}^k \alpha_j x_{ij}} e^{-\frac{t^2}{2}} dt = \int_{-\infty}^{\alpha_0 + \sum_{j=1}^k \alpha_j x_{ij}} \varphi(t) dt = \\ &= \Phi(\alpha_0 + \sum_{j=1}^k \alpha_j x_{ij}) \end{aligned} \quad (2)$$

where t is a random variable which follows a standardised normal distribution and denotes the disturbance term, $\Phi(\cdot)$ represents standardised normal distribution, and $\varphi(\cdot)$ denotes the corresponding density function (Marjanović & Marković, 2019).

According to the previously stated hypothesis, the estimated model is specified as follows:

$$\begin{aligned} P(Y_i = 1) &= \Phi(\alpha_0 + \alpha_1 AGE_i + \alpha_2 AGESQ_i + \alpha_3 ED2_i + \alpha_4 ED3_i + \\ &+ \alpha_5 ED4_i + \alpha_6 ED5_i + \alpha_7 MarStat_i + \alpha_8 Children6_i + \alpha_9 Children18_i + \\ &+ \alpha_{10} HouseholdEarnings_i + \alpha_{11} Residence_i) \end{aligned} \quad (3)$$

where Y_i represents the binary dependent variable (female employed or not employed), α_0 denotes the intercept term and $\alpha_1, \alpha_2, \alpha_3, \alpha_4, \alpha_5, \alpha_6, \alpha_7, \alpha_8, \alpha_9, \alpha_{10}, \alpha_{11}$ represent estimated effects.

RESULTS

The estimation of the probit regression parameters was done using the Maximum Likelihood method, which evaluates the parameters by maximising the probability function, using Stata 13. The results are presented in Table 3.

Table 3. Probit estimation of the influence of explanatory variables on the women's employment likelihood in the Region of Southern and Eastern Serbia

Variable	Coefficient
AGE	0.3031 (0.0495) ^{***}
AGESQ	-0.0034 (0.0006) ^{***}
ED2	0.4811 (0.3380)
ED3	0.7471 (0.3485) ^{**}
ED4	0.7808 (0.3591) ^{**}
ED5	1.3117 (0.5414) ^{**}
MarStat	0.0305 (0.1726)
Children6	-0.1464 (0.1548)
Children18	-0.2798 (0.1543) [*]
HouseholdIncome	4.18e-06 (1.42e-06) ^{***}
Residence	0.4791 (0.1327) ^{***}
cons	-6.5665 (0.9550) ^{***}

Note: * p<0.1; ** p<0.05; *** p<0.01;

Standard errors in parentheses.

Source: Authors' calculation

LR statistics, used to test the joint null hypothesis that all the slope coefficients except the constant are zero, is rejected at a significance level of 1% (LR chi2 (7) = 116.39, Prob > chi2 = 0.0000). The value of McFadden R² shows a moderately good goodness-of-fit for the model (0.1515).

To perform a quantitative interpretation of the model parameters, it is necessary to establish marginal effects (Greene, 2003). The marginal effect determines the effect that the change in a certain explanatory variable has on the predicted probability of the dependent variable, when

the other covariates are kept constant (Aidoo et al., 2019). The marginal effects are presented in Table 4.

Table 4. Marginal effects of the influence of explanatory variables on the women's employment likelihood in the Region of Southern and Eastern Serbia

Variable	Coefficient
AGE	0.0861 (0.0128)***
AGESQ	-0.0010 (0.0002)***
ED2	0.1366 (0.0955)
ED3	0.2121 (0.0979)**
ED4	0.2217 (0.1009)**
ED5	0.3723 (0.1519)**
MarStat	0.0086 (0.0490)
Children6	-0.0416 (0.0438)
Children18	-0.0794 (0.0435)*
HouseholdIncome	1.19e-06 (3.98e-07)***
Residence	0.1360 (0.0366)***

Note: * p<0.1; ** p<0.05; *** p<0.01;

Standard errors in parentheses.

Source: Authors' calculation

These results show that women's employment in the Region of Southern and Eastern Serbia increases with age, but this trend decreases after a certain number of years. More specifically, the breaking point of 43 years was obtained by fitting the U-shape curve of the age quadratic function. Based on these results, it can be concluded that hypothesis H1 is confirmed.

The results of the study support the second hypothesis, H2, as well. Namely, the results of the study show that women with a higher level of education are more likely to be employed. This effect starts to manifest with basic academic educational attainment (positive and significant influence of variables ED3, ED4 and ED5).

On the other hand, marital status is not a significant determinant of women's employment in the Region of Southern and Eastern Serbia (pos-

itive but not significant influence of variable MarStat observed). Consequently, hypothesis H3 is not confirmed.

When it comes to having children, it was found that having a child under the age of 6 does not show a significant impact on the probability of employment of women in the Region of Southern and Eastern Serbia (negative but not significant influence of variable Children6 observed), while having children aged 7 through 18 negatively affects the probability of women's employment (negative and significant influence of variable Children18 observed). Subsequently, neither hypothesis H4 nor hypothesis H5 are confirmed.

Household income (excluding women's income) shows a positive impact on the probability of women's employment (positive and significant influence of variable HouseholdIncome observed), which did not confirm the sixth research hypothesis, H6.

Place of residence is also a significant determinant of women's employment, with women living in urban areas being more likely to be employed than women living in rural areas (positive and significant influence of variable Residence observed). Therefore, hypothesis H7 is confirmed.

DISCUSSION AND PRACTICAL IMPLICATIONS

The results of the conducted study could be significantly indicative. The fact observed in the results of this research, that the probability of women's employment increases with age, and then starts decreasing after the breaking point, is supported by the results of several studies. One of them is the study conducted by Besamusca et al. (2015) who, on a sample of 117 countries, found that FLFP increases after the completion of the mandatory education process, and decreases as the retirement phase approaches. In addition, Xin et al. (2021) identified that the turning point for the influence of age on women's employment is between the ages of 35 and 40. The non-linear effect of age, and the low employment rate at the beginning and the end of a career can be justified by the fact that women at the beginning of their career lack the experience needed for the job, and by the fact that women's motivation to seek a job and their skills are inversely proportional to their age in the second half of their career, as they approach the retirement phase. In relation to the Republic of Serbia, the study's results could also be explained by the fact that many of the enterprises from the Region of Southern and Eastern Serbia went through a challenging process of privatisation during the 2000s, and many women lost their jobs during that period (Videnović et al., 2021). Most of them are now older than 40 and belong to a harder-to-employ group of people (Stanković et al., 2015). Therefore, policymakers should create programmes for the employment of such a group of women, some of which may involve the establishment of, for example, social enterprises, the or-

ganisation of training programmes, or a solution to the discrepancies between skills and labour demand².

This study further shows the positive impact of education on the likelihood of women's employment, which is consistent with the results of other research (Chen & Hamori, 2010; Chen et al., 2014). However, when it comes to the Region of Southern and Eastern Serbia, the positive effects of education on employment are manifested only after the obtainment of a university degree. Having this in mind, the results of this study suggest that it is desirable to create policies aimed at *encouraging women to continue their education after high school by providing greater, primarily informal, financial incentives for further education*. Moreover, universities are typically located in large cities and tertiary education, therefore, involves the migration of children from their place of residence and costs connected to this (Maghnouj et al., 2020). In the area of education, it is advisable to *harmonise the needs of companies from a certain region with the educational system in the same region, so as to create a labour force with specific competencies, which will generate their prospects for future employment*.

When it comes to the impact that having children has on the probability of women's employment, the results of this empirical research indicate that having children aged 7 through 18 negatively affects the probability of women's employment. This result is supported by the results of the study conducted in Jordan, which indicate that having children aged 7 through 14 had a negative effect on women's employment (AlAzzawi & Hlasny, 2019). The results obtained in our study could be explained by the traditional role of women – women are expected to support their children during their primary and secondary education. However, since school-age children are considered to be sufficiently independent already, it is desirable to encourage this independence by including children in the process of completing household chores, so that the mother has more time to devote to full-time or part-time employment. However, Jakovljević and associates (2019) agree on the fact that women are not legally supported in engaging in part-time employment. Additionally, women are not protected from discrimination by employers, or from compensation systems which favour men. Based on the above, the suggestion for policymakers is to *make it easier for women to combine work and family*, which is likely to facilitate their entry into the workforce (Blau & Kahn, 2012).

The positive effect of household income (excluding women's income) on the probability of women's employment is not in line with expectations, but it is supported by the results of previous research. Chen

² The National employment agency provides some educational programmes, but as the number of employed women is still very low, it is obvious that there is still room for improvement in this area.

and Hamori (2010) found that women will be motivated to find a job if the family income is higher. Moreover, Chen et al. (2014) noted that both women from urban and rural areas will be motivated to take part in the labour market if their husband does the same. Our results can be explained by the fact that the Region of Southern and Eastern Serbia is a relatively poorer region, with average earnings lower than the national level (Statistical Office of the Republic of Serbia, 2019). Consequently, as many household members as possible should be involved in earning an income. This understanding of the problem is not without support in literature. Randelović et al. (2019) state that persons from low-income areas, such as the Region of Southern and Eastern Serbia, are to some extent forced to form the labour supply of that region (p. 15). On the other hand, women's participation in earning an income tends to remove the pressure of being the only contributors to the family budget from their husbands (Saikia & Mazumder, 2015). Accordingly, it is of great importance for women's employment that there are opportunities for both genders to find employment, that household members are employed, and that the average salary is not under the national level in these regions. *Thus, all policies should be aimed at creating workplaces and increasing the economic status of workers in the analysed regions.*

The results of this study show that the place of residence, i.e., an urban area, positively influences the probability of women's employment. Similar results were obtained in the research of Sarfraz et al. (2021). This can be explained by the fact that women in urban centres have more chances of finding employment. Sarfraz et al. (2021) state that an urban place of residence offers women not only the opportunity to work for a wage but also the opportunity to be an employer. Conversely, the employment of women in rural areas is rather vulnerable. Considering the employment opportunities in rural areas, and the fact that village demographic deprivation trends in the Republic of Serbia are continuing (Kuzmanović et al., 2020), *the government should target both problems in its programmes, so as to enhance the employment possibilities of women living in rural areas and to slow down the continuous migration process from rural to urban areas.*

CONCLUSION

This paper emphasises the importance of women's participation in the labour force and the employment relationship, since a higher degree of women's employment has many positive effects on the economy. Therefore, it is reasonable to believe that women's greater participation in employment relationships will enhance not only the economic development of the Republic of Serbia but also the economic development of its underdeveloped regions, such as the Region of Southern and Eastern Serbia. Therefore, the

main goal of this paper was to identify the factors that determine women's employment in this region, so as to be able to propose measures for women's greater participation in the labour market of this region.

The results of this empirical study, conducted on a sample of 678 participants (women), indicate that the age of a woman, as the proxy of her experience, increases the probability of women's employment, but only up to the age of 43, after which the inverse relationship applies. Furthermore, this study demonstrates that educational attainment is also a significant determinant of the probability of women's employment. Nevertheless, to enjoy this effect, women must have at least a basic university education. On the other hand, the results of this study indicate that being married is not a significant factor determining women's employment status. Furthermore, the study shows that having children under the age of 6 does not have a significant negative impact on the likelihood of women's employment. However, having children aged 7 through 18 negatively affects the likelihood of women's employment. In addition, the study shows that household income has positive effects on women's employment, since the Region of Southern and Eastern Serbia is a relatively poor region. Consequently, in the attempt to achieve financial well-being, more family members must be included in the labour market. The probability of women's employment is also affected by the place of residence, with a woman living in an urban area being more likely to be employed than a woman living in a rural area.

Having in mind the obtained results, the authors of this paper suggest which actions can be undertaken to increase women's participation in employment relationships. Some of these actions are: encouraging women to continue their education after high school by providing greater financial incentives or organising different training programmes, harmonising the needs of companies from a certain region with the educational system in the same region so as to create a labour force with specific competencies, and creating workplaces (for example, social enterprises).

The conducted study contributes to the existing literature both empirically and theoretically. Empirically, it provides a model for the analysis of women's employment on the example of women from the Region of Southern and Eastern Serbia. Theoretically, it provides guidelines for policymakers to understand the basic factors influencing the probability of women's employment, and allows them to create tailored policies aimed at encouraging women's employment in the researched region.

The conducted research faces some limitations. They are reflected in the sample selected for analysis, which is not representative. Thus, the results of the study should only be seen as indicative. Therefore, to obtain more reliable results, which could be generalised to apply to the country as a whole, further research should be directed towards increasing the number of women in the research sample, and towards encompassing other regions.

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ДЕТЕРМИНАНТЕ ЗАПОСЛЕНОСТИ ЖЕНА У РЕГИОНУ ЈУЖНЕ И ИСТОЧНЕ СРБИЈЕ: ЕКОНОМЕТРИЈСКИ ПРИСТУП

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Резиме

Бројна истраживања указују да укључивање жена на тржиште рада може имати значајне позитивне економске и социјалне ефекте. Наиме, повећањем запослености жена долази до раста броја запослених, што омогућава опстанак пензионог система који је под притиском због старења популације. Са друге стране, повећање запослености жена доводи до успостављања полне једнакости, еманципације жена и повећања њихове преговарачке моћи. Намеће се питање како подстаћи жене на већу укљученост на тржишту рада. Одговор на ово питање је значајан за све земље које се суочавају са мањом укљученошћу жена на тржишту рада, каква је и Република Србија. Посебно се истиче Регион Јужне и Источне Србије, у ком је неједнакост у проценту запослених жена у односу на мушкарце била најизраженија 2020. године. С тим у вези, циљ рада јесте анализа основних фактора запослености жена у Региону Јужне и Источне Србије. Истраживање је спроведено у периоду између јануара и маја 2019. године анкетирањем 678 жена. Ради оцене утицаја варијабли старости, образовања, брачног статуса, прихода домаћинства (без прихода жене), деце старости од 0 до 6 година, деце старости од 7 до 18 година и живота у руралној или урбаној средини на вероватноћу запослености жене дефинисан је пробит модел. Анализа је показала да старост, ниво образовања, деца од 7 до 18 година старости, приходи домаћинства (без прихода жене) и место пребивалишта представљају значајне детерминанте запослености жена. Тачније, идентификован је нелинеарни ефекат година старости на вероватноћу запослености жене. Другим речима, вероватноћа запослености се повећава са годинама старости, али се овај тренд смањује након одређеног броја година (преломна тачка је 43 године). Значајан податак за креаторе политика усмерених ка повећању запослености жена јесте да са повећањем нивоа образованости, посебно од основног академског образовања и више, долази до повећања запослености. Деца од 7 до 18 година старости негативно утичу на запосленост жена, док приходи домаћинства (без прихода жене) позитивно утичу на запосленост жена. Прва појава се може објаснити традицијом каснијег осамостаљења деце школског узраста, што дестимулишуће делује на жељу жене да ради. Друга појава се може повезати са ниским просеком примања у истраживаном региону, због ког је жена подстакнута да допринесе увећању кућног буџета иако већ постоје неки приходи у домаћинству. На крају, место пребивалишта позитивно утиче на запосленост жена, са нагласком на већи утицај живота у урбаној средини. У погледу значаја резултата истраживања, може се истаћи њихов допринос креирању политика усмерених ка повећању запослености жена међу којима су: стипендије и кредити за финансирање образовања, програми подршке запошљавања младих жена, али и жена у старијем животном добу, и флексибилни услови рада који би омогућили женама да балансирају приватни и пословни живот.

THE CHALLENGES OF TEACHING NATIVE AMERICAN LITERATURE AS PART OF THE NINETEENTH CENTURY AMERICAN LITERATURE COURSE

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Abstract

This paper focuses on the challenges of including Native American literature in the course on nineteenth century American literature. Survey literature courses often feature canonical works and exclude minority or contrarian voices. My literature survey course includes the creation stories of four Native American tribes originating from different parts of the U.S., together with the works of contemporary Native American writers reflecting on the pre-colonisation and colonisation periods of American history. The process of teaching the course foregrounded the tensions between the dominant white settler mentality and the political and social marginality of Native Americans, making my students aware of the importance of multivalent analyses of literary and historical texts. Throughout the course, we discussed prevalent stereotypes about Native Americans in American literature. The experience of teaching this course leads me to the conclusion that it is important to discuss various marginalised voices in the survey courses on nineteenth century American literature. These texts reflect themes related to race, gender, religion, and ownership of land that go beyond literature to include social, political and historical issues, helping our students develop a better understanding of American culture.

Key words: Native American literature, survey course, nineteenth century American literature

ИЗАЗОВИ У УКЉУЧИВАЊУ ИНДИЈАНСКЕ КЊИЖЕВНОСТИ У ПРЕГЛЕДНИ КУРС АМЕРИЧКЕ КЊИЖЕВНОСТИ ДЕВЕТНАЕСТОГ ВЕКА

Апстракт

Чланак анализира изазове које представља укључивање књижевности америчких Индијанаца у курс о америчкој књижевности 19. века. Упоредо са индијан-

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ским причама о стварању света, студенти су читали дела савремених индијанских писаца која се баве периодима пре и након колонизације северне Америке. Чланак се такође бави стереотипима о Индијанцима, пре свега оним о племенитом дивљаку и раси која изумире, које налазимо у америчкој књижевности 19. века. Студенти су преиспитивали сопствено виђење стереотипа о Индијанцима кроз популарну културу и читање два романа о периоду колонизације: „Мала кућа у прерији“ и „Девојчица са острва духова“. На основу коментара студената наведених у чланку, може се закључити да је важно укључивати текстове писаца из маргинализованих група у прегледне курсеве о књижевности. Ти текстови омогућују шире разматрање тема о раси, полу, религији и праву на имовину које превазилазе оквире књижевности и укључују друштвене, политичке и историјске теме, што помаже студентима да боље разумеју америчку културу.

Кључне речи: Индијанска књижевност, прегледни курс, америчка књижевност деветнаестог века

INTRODUCTION

In this article, I will discuss the challenges faced by professors teaching Native American literature as part of a survey course on nineteenth century American literature. As I hope to show, the problems related to survey courses are multifaceted. The most obvious among these problems is the issue of falling into the usual trap of teaching only canonical works which, until recently, included literary texts written exclusively by white male middle class writers and, consequently, excluded the works written by women and ethnic minorities. This was an especially poignant question in nineteenth century literature, when voices from the margin were barely visible in public discourse. Another problem is making sure the students grasp the historical and cultural backgrounds of the works discussed, despite the relatively short period of time apportioned to each work due to the need to present the period in a wider scope. A survey course which aims at enabling the development of students' critical perspective should highlight the tensions between political and social marginality, and individual perspective, and should give students a personalised view of history.

METHODOLOGY

My methodology focused on redesigning the survey course on nineteenth century American literature through the inclusion of Native American, African American and female authors. Although the voices of all these writers are important for the period in question, as a rule, the survey literature courses covering this period feature the works of white, male authors (Irving, Cooper, Poe, Melville, Emerson, Whitman) who are included in the canon of nineteenth century American literature. The usual exception is made for Emily Dickinson, as the sole representative of female writing in these courses. However, as noted by George and Barba-

ra Perkins (1999), the renowned editors of anthologies of American literature, we should try to “increase our representation of early American diversity with descriptions of Native American life” (xx), women’s issues and the experiences of American slaves.

The discussion of the methodology of the inclusion of all suppressed voices in a survey course would be too long, so this article focuses on the inclusion of Native American literature, since it reflects the problems involved in designing a more diverse survey course. Another theme I want to address is the method of incorporation of the works belonging to the category of contemporary Young Adults literature dealing with the period of the settlement of the Midwest, which can help students to better understand the topics mentioned in the works of nineteenth century white and Native American authors.

I placed the dominant themes of nineteenth century literature (American identity, Manifest Destiny, ownership of land) in a comparative perspective, illuminating them with texts from varied cultural backgrounds. The consideration of Native American history and culture in the nineteenth century also has to be connected to the issues pertaining to race, religion, gender, and the settling of the frontier. Fitz (2013, p. 125) suggests that the importance of the study of Native American literature extends far beyond the merely literary to embrace questions of historical, social, and political significance as well.

I have found it useful to combine teaching the creation stories of four Native American tribes originating in different parts of the U.S. with the works of contemporary Native American writers, since it helped me reflect on the pre-colonisation and colonisation periods of American history. In the course, I foregrounded the tensions between the dominant white settler mentality and the political and social marginality of Native Americans, making my students aware of the importance of multivalent analyses of literary and historical texts. Native American creation stories offer students a perspective which is very different from the dominant narrative of American colonisation, particularly in relation to the issue of land and its ownership. We examined the prevalent stereotypes about Native Americans in the American literature of the time. Juxtaposing these texts to Native American Creation stories opened up discussions on religion, the influence of Christianity and the treatment of women in Christian and Native American cultures.

THE DISCUSSION ON NATIVE AMERICAN CREATION STORIES

The Historical Background of Native American Creation Stories

Bruce Michelson and Marjorie Pryse argue (1998, p. 72) that Native American creation stories may seem misplaced in a nineteenth century literature course, since versions of these stories date back to the nineteenth

and early twentieth century. However, including them in a nineteenth century literature course is pedagogically appropriate since the written narratives are transcriptions or translations of oral stories whose origin is much older than their written versions, and the worldview they present is markedly different from the worldview the colonisers brought with them.

Thus, the first issues that have to be addressed are the transition from the oral to the written medium, and the translation of Native American stories into English. The majority of Native Americans in the nineteenth century were illiterate, and their cultures were oral. Many of the stories are directly connected to the rituals they accompany, and they are revealed only to the initiated. "Informants rarely tell their stories to outsiders in the same way they would narrate them in a tribal gathering," which makes the versions of the stories handed down to transcribers problematic (Perkins & Perkins, 1999, p. 523) Even if the stories were written down by Native Americans, those who were literate were so due to the education they received in missionary schools, which presupposes the influence of Anglophone culture and Christianity on their writing. On the other hand, the first to transcribe stories were often missionaries who went to Native American territories in order to bring Christianity to Native Americans. In the process, they learned the rudiments of their language and tried to put down their stories.

However, instead of perceiving these stories "as obsolete and archaeological artefacts" (Michelson & Pryse, 1998, p. 71), my students and I became engaged in the debate on the transfer of knowledge and the influence of Christianity on Native Americans, connecting these issues to the present struggle of Native Americans in defining themselves in the dominant, Christian white culture. Therefore, my suggestion is to read Native American creation stories in a wider context instead of in a historical vacuum. This can be accomplished by using materials with different historical and cultural backgrounds, from elements of the pre-colonisation Native American tradition, and the nineteenth century American culture at the time of their recording, to elements of the present day European, Anglo-American and Native American contexts. As Michelson and Pryse argue, putting Native American creation stories side by side with European narratives of colonisation "allows students to view their own reading as encounters of cultures as well as historical persons." (1998, p. 71) For that reason, I gave my students texts from the period of the settling of the American Eastern coast, and we analysed the portrayal of Native Americans in them. We particularly focused on the works of John Smith and his romantic story about the Native American woman, Pocahontas, who allegedly saved him from death. Here we see the two prevalent trends in the representation of Native Americans – they are either represented as noble savages or as barbarians who were a threat to the European settling of North America. Smith's rendition of Pocahontas brought us to the Disney

version of the story, which many of my students are familiar with, and we analysed the way the stereotypical rendition of Native Americans stayed the same through the centuries.

While examining the students' perceptions of Native Americans, it came to light that most of them have been largely influenced by the images of Native Americans in the popular media. A lot of them grew up watching old western movies or reading comics, which means that they entertained the stereotypical images of Native Americans with headdresses, riding horses and dying more or less nobly while fighting American settlers. The stereotypes my students mentioned coincide with the centuries old portrayal of Native Americans in American culture, and the origins of these stereotypes certainly go back to the period of colonisation. Euro-Americans tended to view Native Americans through binary oppositions (either noble or savage) from their first encounters. Due to their prominent place in nineteenth century literature, and due to their later influence on American popular culture, I discussed these stereotypes with my students before I moved on to the analysis of the works that were part of my course.

The Stereotypes of the Vanishing Indian and the Noble Savage

In his book *The Inconvenient Indian*, Thomas King examines numerous examples from American literature, film and comics, and gives evidence that all Native American characters can be placed into three categories: the bloodthirsty savage, the noble savage, and the dying savage. As King explains:

The bloodthirsty savage was the most common. This was the familiar character who rode around wagon trains, burned settlers' cabins to the ground, bashed babies against trees, and trapped cowboys and soldiers in box canyons. The second type was the noble savage, an Indian who assisted Whites in their struggles with bloodthirsty Indians, spoke fluent English, and understood the basic precepts of supply-side capitalism. The dying Indian, on the other hand, was just that. Dying. Not from a wound. Not from any disease. This was the Indian who was simply worn out, who was well past his "best before" date, who had been pulled under by the rip tide of western expansion, drowned, and thrown up on the beach to rot. (King, 2012, p. 36-7)

Kathryn Fort explains that the concept of the vanishing (or dying) Indian "refers to a literary, historical, and cultural understanding of the clash between 'civilized' colonizers and 'savage' Indians" (2013, p. 309). It is related to the deaths of individual Native Americans, as well as the deaths of whole tribes, and the eventual assimilation of Native Americans into the white American society. In the nineteenth century American literature, the image of the vanishing Indian became ubiquitous. However, it must be pointed out that the conviction that Native Americans are inferior to the whites is the origin of the tropes of the vanishing Indian and the

noble savage. As one of the characters in Cooper's novel *The Deerslayer* comments: "God made whites at the top, blacks in the middle to be tolerated and made use of and placed Indians at the bottom of the hierarchy as only half human" (2018, p. 31). Similarly, Longfellow's poem *Hiawatha* features Indians who peacefully disappear, recognising the inevitability of the white man's progress.

The trope of the vanishing Indian encompasses the idea that Native Americans would eventually disappear due to diseases, famine and war, or that they would assimilate and melt into the dominant society after they had been 'civilised'. The trope of the noble Native American was created as another justification of this idea. He is noble because he recognises that the whites are superior to other races, and is willing to help them in their endeavours. That is why we often find the character of the noble savage as the sidekick of the white settler. The best example are certainly Cooper's hero Natty Bumpo and his Native American sidekick Chingachgook. Through the process of male bonding with the white male heroes, Native American characters have been co-opted into the dominant narrative of Manifest Destiny and the suppression of people who presented an obstacle to it.

*USING THE WORKS OF CONTEMPORARY AMERICAN AUTHORS
AS PARALLELS TO THE WORKS OF NINETEENTH CENTURY
WRITERS*

I invited my students to examine their perceptions of Native Americans and their portrayal in popular culture by reading two works which centre on the period of colonisation: Laura Ingalls Wilder's *Little House on the Prairie*, and Louise Erdrich's *The Birchbark House*. While both use the persona of a seven-year-old girl to depict the settling of the Midwest in the 1870s and 1880s, their approaches to racial and gendered agency in American history, and the tropes of the noble savage and the vanishing Indian, are diametrically opposite. I will use my students' written responses to these texts to illustrate how their perspective on this period and the protagonists changed after reading these works.

Little House on the Prairie

The book was published in 1930, and describes incidents from Laura Ingalls Wilder's childhood, focusing on the period between 1869 and 1871, when her family left their home in Wisconsin to settle on the territory of the Native American tribe Osage in Kansas. It is one of the most popular works of Young Adult literature (YAL) in the U.S. The TV show made after the series added to the popularity of the books. Discuss-

ing works of YA literature¹ alongside the classics of the nineteenth century proved to be equally rewarding and challenging. Katie Rybakova and Rikki Rocconti advocate for “using YAL as a scaffold for canonical literature” (2016, p. 32). In my experience, their claims that “adolescents can more easily relate to such works and that they provide easier access for struggling readers,” (2016, p. 32) proved to be true. My students connected with the works of Ingalls and Erdrich more readily, since they were able to identify with the child narrators and their coming of age stories. Therefore, it can be helpful to teach canonical texts alongside YA literature with similar themes.

Laura Ingalls Wilder’s culturally insensitive and racist sentiments reflect the general outlook on Native Americans characteristic of the period in which she lived and wrote her novels. For example, from the beginning, Laura’s parents explain to her and her sister that they are in Indian country, but that the Indians will not be there long and that the land would be open to settlers. As Pa says: “When white settlers come into a country, the Indians have to move on. [...] White people are going to settle this country, and we get the best land because we get here first and take our pick” (1971, p. 236-7). His explanation reflects the doctrine of Manifest Destiny, and he presents the settlers as instrumental in this plan. When Laura asks him whether the Indians would be upset if they were made to leave, Pa refuses to answer. As Kaye contends:

The narrative leads the reader to feel that the Ingalls are in the right. However, legally and by right of occupancy it is the Osages who are the owners of the land and the settlers who are the unwelcome and threatening intruders. (2000, p. 133)

The first trope we encounter in the novel is that of the Native American as a barbarian. On numerous occasions in the book, Laura describes Indians as “naked, wild men, fierce looking with snake like eyes” (1971, p. 134). Laura’s mother Caroline and the family’s neighbours hate Indians, and claim that the only good Indian is a dead Indian. There is a rumour that Native Americans will attack the settlers, until a warrior called Soldat du Chêne appears and orders the Osage not to kill the white people, but to leave instead. Pa calls him the ‘one good Indian’, confirming the stereotype of the noble savage.

When I provided the students with the historical background for this episode, they learned that Congress broke its treaty with the Osage in 1870, ordering them to move out of Kansas. As Kaye points out, the Osage did not actually plan to kill the settlers, no other tribes were help-

¹ Young adult literature is defined by several characteristics: the protagonist is a teenager, the plot does not end in a ‘storybook’ happy ending, and the content is typically a coming-of-age story (Cole, 2008, p. 49).

ing them do that, and no heroic and peaceful Soldat du Chêne existed (2000, p. 135). The novel ends with the procession of the Osage leaving their homeland, solidifying the myth of the vanishing Indian.

The students' comments on the characters and the plot of the novel reveal that they observed its duplicity in the treatment of Native Americans. They described the Ingalls as people reaching for the American Dream, but commented that the fulfilment of the Dream came at the expense of the Indians, since the settlers were used by the government to push the Indians out of their territories. They also noted the settlers' sense of entitlement to the land which was not theirs, and the racism inherent in the settlers' comments about Native Americans. Some stated that the author is fair towards Indians because, although they were presented as savages, they are also portrayed as people who love their land. Interestingly, some students wrote that their initial perception of Indians coincided with that of the white settlers. Several described them as "Tall and red people". One student wrote: "They wear skunk skins, have naked chest and are barefoot, communicate with animal noises and smell bad". By the end of our analysis of the novel, the students remarked on the difference between the notion of the American Dream and the reality of the settling of the Midwest. Many were surprised by the harsh reality of the settlers' life, since they could often barely sustain themselves, and by the struggle of Native Americans to find their place in the West. One student remarked that the novel "walks the thin line between presenting the family as wholesome and some deeper issues like racism". They also noticed that the Indians in the novel are praised only when they leave their land so that the settlers can take it.

Native American Creation Stories

Native American creation stories represent a good way for students to gain insight into Native American tradition, because they "posit a general cultural outlook and offer perspectives on what life is and how to understand it" (Baym, 2003, p. 16). Before launching into a discussion about Native American stories, I emphasised to my students that one should not generalise about Native Americans. This can be achieved by taking materials from different tribes into consideration. I propose reading Native American stories intertextually, and creating parallels with other creation stories with which students are familiar, particularly the Bible.

We started with the Iroquois creation story. It depicts the Sky woman, who conceives independently and then descends into the lower world. After that, the Sky woman dies. The twins create the world, the stars, the sky and the planets out of parts of her body. Although they are rivals, they create equally. In comparison with the western worldview, we do not find the binary oppositions of good and evil or the concept of sin and punishment in the Iroquois story. The nether world is not described as hell, and its creatures are not demons meant to torture unfortunate souls.

They are helpful and participate in the creation in their own way. In comparison with the Bible, the Sky Woman's Immaculate Conception does not need to be heralded by an angel in order for the blame to be taken away from women, and it is not connected to God. Of special note is the importance of women in Iroquois life. Baym (2003) notes that:

Women owned the property and took responsibility for major decisions of social life. [...] The principal male figure in an Iroquois child's life was not the father but the mother's brother, and the image of mother-dominated families is established strongly in the creation legend. (Baym, 2003, p. 18)

There is also no distinction between the world and the Creator. Instead of one principal creator (God), there are many creators who can be placed in different categories (Sky woman, twins, animals etc.). We find such pantheistic approaches to creation in all Native American stories. Unlike the Christian God, who creates alone in six days, creation takes a longer time in the Iroquois story, and co-creators are indispensable in the process. Not only is the female body essential for creation but women are also created simultaneously as men. This is in stark opposition to the Biblical story about Adam and Eve.

In comparison with the Iroquois story, the Pima Creation story is about "the emergence of the world" (Michelson & Pryse, 1998, p. 72). The beginning of the Pima story corresponds to Genesis – the spirit floats over water in darkness, which prompts the students to ponder on the transcription and translation of Native American stories into English. The superimposition of the Christian master narrative on Native American materials is also evident in another part of the story, which deals with the flood. However, at some points, the Pima story diverges significantly from the Christian story. Unlike the infallible Christian God, the Pima deity, Juhwertamahkai, makes mistakes in his attempts to create the world and human beings. In Genesis, God declares Adam in charge of all creatures, thus giving him complete dominion over the world. In the Pima story, various medicine men and animals create independently, or they join efforts in creation. What is most significant is that they always show respect towards nature and its creatures. Nobody acts as a single ruler of the world.

The story of the flood describes the flood in terms of natural events, unlike the Bible, which blames sinful human behaviour for the disaster and presents the flood as the act of a displeased God. The flood occurs as the result of a misbalance created by a man that the Buzzard made, who sleeps with many women and has many children whom he abandons. When he starts courting the daughter of the South Doctor, she turns him into a woman who gives birth to a baby, and she turns into a man. This gender shift is seen as a way to teach the young man about the plight of women and his mistreatment of them. During the flood, the creators and the people escape through the holes in the earth to other, new

worlds they created, which may be an allusion to the territories of various tribes. But, sickness and conflict also escape through the holes, so the story can be interpreted as a way to explain both birth and death, and the struggle to create order out of chaos.

Like the Pima story, the Sioux creation story is about the ‘emergence of the world’, and features the Creating power, who is not pleased with the world because people are not acting as humans. He decides to make a new world – the third one, since he destroyed the previous ones. He starts by lighting his sacred pipe and singing four songs, which bring rain and life to earth. Akin to God in Genesis, he also floats above the water. However, this story also features the concept of co-creators. He sends different animals (a loon, an otter, a beaver, and a turtle) from his sacred pipe bag to fetch earth from water, and finally the turtle succeeds. With this lump of mud, the creator makes an island, singing ritual songs all the while. He takes all sort of animals, plants and birds out of his bag, and creates the shapes of men and women out of different coloured soil. This makes the origin of races immediately obvious, which is not the case with the Bible. He also creates a rainbow as a sign that there will be no more floods if the people live in peace with each other, and with all beings.

The Anishinabe creation story is comparable to the Sioux creation story. Kitchi Manitou unleashes the flood, and the trickster figure Nanaboozho survives. Similar to the creator in the Sioux story, he has animals (a loon, a helldiver, a mink, and a turtle) help him by diving into the water to retrieve a lump of soil. Nobody manages but the muskrat, although he is the smallest. The muskrat dies of his efforts, and Nanaboozho and all the animals mourn his sacrifice. The turtle offers its back so that it can bear the weight of the Earth. Thus, the first island was created, and all life from it. We see that for the Anishinabe, as in other Native American tribal religions, “man and the rest of creation are cooperative and respectful of the task set for them by the Great Spirit” (Deloria, 2003, p. 81). This task “is to determine the proper relationship that the people of the tribe must have with other living things and to develop the self-discipline within the tribal community so that man acts harmoniously with other creatures” (Deloria, 2003, p. 87). By comparison, “in the Christian religion both are doomed from shortly after the creation event until the end of the world” (Deloria, 2003, p. 81).

Native American creation stories teach us how people lived, and which aspects of their existence were especially significant for them. We likewise see the landscape they occupied, from the desert land of the Pima to the Great Lakes of the Anishinabe. I turned the attention of my students to these details, and they drew parallels among the stories and noted the differences which reflect the tribes’ culture and traditions. As Vine Deloria observes:

Indian tribal religions and Christianity differ considerably on numerous theological points, but a very major distinction that can be made between the two types of thinking concerns the idea of creation. Christianity has traditionally appeared to place its major emphasis on creation as a specific event while the Indian tribal religions could be said to consider creation as an ecosystem present in a definable place. (Deloria, 2003, p. 77)

We should also not forget that these were oral stories with many versions, firmly situated in the rituals of the tribes which told them. In order to better illustrate this to my students, I introduced them to Louise Erdrich's novel *The Birchbark House*, which utilises the Anishinabe creation myth.

The Birchbark House

Erdrich wrote *The Birchbark House* series as a counterpoint for *Little House on the Prairie*, which is another reason why I chose to discuss this work, so as to enable the students to draw parallels between them. Similar to the seven-year-old narrator in *Little House on the Prairie*, *The Birchbark House* is narrated by a seven-year-old, Omakayas, an Anishinabe girl who lives with her family on an island in Lake Superior. The novel describes an important historical period for the Anishinabe, as they are struggling with the white settlers' invasion, as well as a small pox epidemic. The plot is structured around the seasons – it starts in the summer of 1847, and ends in the summer of the following year. Omakayas and her family move to their birchbark house on the shores of the lake, and the readers get acquainted with the everyday activities of the Anishinabe. It soon becomes obvious how connected the Anishinabe are to nature, and how wholly dependent on it they are for everything, from materials for houses to food, clothes and heating.

Women, from the female hunter Tallow, who keeps the family alive during the period of hunger and the small pox epidemic, to Omakayas' grandmother Nokomis, play strong roles in the novel. As a healer, Nokomis teaches the children the songs and stories of their people. She tells them the story of creation, so that the children can learn that even the smallest person or animal, like the muskrat, counts and that they all have a role in creation. On a number of other occasions in the novel, the characters communicate with animals and the animals, in turn, help them survive. This presents a different outlook to the one present in Anglophone literature, where nature is seen as the dominion of men, to be conquered and controlled. My students noticed this difference and commented upon it in their essays about the novel. One wrote: "I did not know how important was the bond with nature for Anishinabe. They only took from nature when they really needed something and always gave thanks". Another stated that she "was surprised at how relevant women were for An-

ishinabe culture and how strong were the bonds within a family”. Another said: “The fresh take on animistic beliefs of the Native Americans is what deeply touched me: the strength of their link with nature is such that it dominates everything from their daily routines to their worldview. Their respect for animals and even trees they used for making house is extraordinary”.

Another important theme of the novel is hybrid identity. Omakayas’ father Deydey is half white, as well as Tallow, but they identify themselves as Anishinabe. Their hybrid identity does give them an advantage when dealing with the whites, and is the reason behind their literacy and knowledge of English. Erdrich eschews portraying all white people as negative characters and, instead, shows how the occupation of Anishinabe land, coupled with the diseases the white settlers brought with them, destroyed the tribal way of life. A large number of the Anishinabe in the novel die of small pox. Omakayas learns that the reason why she did not catch the disease was because she was the only one who survived the previous epidemic on Spirit Island, which had wiped out her whole tribe. She was adopted by her present family. At the end of the novel, she ponders who she is: “She was the girl from the Spirit Island. She lived in a birchbark house. This was the first day of the journey on which she would find out the truth of her future, who she was” (Erdrich, 2000, p. 222).

The novel, thus:

stands in stark contrast to most traditional adventure stories for children as the action is within, rather than without – or acting on the world. Much of the action is internal and reflective, as Omakayas matures and the prominent themes are of transformation, individual identity and facing fear. (Elser, 2019)

In addition, the classic theme of human beings vs. nature is different from the one present in Anglophone literature. Instead of acting against nature and trying to tame it, the Anishinabe live in unison with it. The comparison with *Little House on the Prairie*, and the parallels between Native American creation stories and the Bible become most useful here. While in Western culture, emphasis is on power over nature, and women and ethnic groups which are seen as different from the dominant white group, the focus in Native American cultures is on the equality and participation of all living beings, as already mentioned in a previous section of the paper. Erdrich depicts her characters as unique individuals, and they are so vivid in their triumphs and tribulations that they could not be further away from the tropes of the noble savage and the vanishing Indian. That is precisely the point behind the incorporation of Erdrich’s novel in the course. The students can see how Native American stories stay alive and evolve through numerous retellings, from oral stories and nineteenth century renditions, to a twenty-first century novel by a contemporary Native American female writer.

CONCLUSION

As I hope I have shown, in order to successfully integrate texts from Native American cultures into the survey course on nineteenth century American literature, it is crucial to prepare students for the analysis of these materials by giving them historical and cultural contexts in which to place them. Students should be given a chance to recognise that they have been exposed to the stereotypes about Native Americans in popular culture, particularly film and comics, as well as the stereotypes in nineteenth century texts written by white authors, which are also part of the course. Identifying these stereotypes and discussing their origin helps students to understand their continuous influence on American culture. Contemporary novels, especially those belonging to the category of Young Adult Literature with which students can identify more readily, can be a way to approach Native American creation stories more easily. They can also help the students situate Native Americans in a specific period, and examine the different worldviews that shaped historical events. Providing the students with the perspectives of both the dominant white group and Native American tribes on the same period is also constructive and enriches the analyses of the course materials. As one of my students wrote at the end of the course: “After the reading of the stories their [Native American] traditions are not far away stories but the reality of these people who are now struggling to keep their people alive”.

My experience leads me to conclude that it is important to discuss not only Native American but also African American and other marginalised voices in our survey courses on nineteenth century American literature, instead of waiting to introduce them in courses on contemporary American literature and culture. These texts reflect themes related to race, gender, religion, and ownership of land that go beyond literature to include social, political and historical issues, helping our students develop a better understanding of American culture.

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ИЗАЗОВИ У УКЉУЧИВАЊУ ИНДИЈАНСКЕ КЊИЖЕВНОСТИ У ПРЕГЛЕДНИ КУРС АМЕРИЧКЕ КЊИЖЕВНОСТИ ДЕВЕТНАЕСТОГ ВЕКА

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Резиме

Чланак се бави укључивањем књижевности Индијанаца у прегледни курс о америчкој књижевности деветнаестог века. Будући да је методологија укључивања потиснутих гласова у прегледни курс превише комплексна, у овом чланку сам се ограничила на дискусију о проблемима у одабиру дела америчких Индијанаца и изазовима са којима сам се суочила током предавања о њима. Циљ ми је био да студенте упознам са важношћу мултивалентне анализе књижевних и историјских текстова, која за полазиште има различите перспективе – индијанске перспективе, и перспективу беле заједнице. Проучавали смо приче о стварању света четири индијанска племена, као и дела савремених америчких аутора који се баве периодом колонизације северноамеричког континента. Такође смо дискутовали дијаметрално супротне описе Индијанаца у два савремена књижевна дела која се баве колонизацијом. У чланку представљам и позитивне аспекте коришћења књижевности за младе, која може помоћи студентима да се поистовете са делима која су окосница прегледног курса америчке књижевности деветнаестог века. Сматрам да је у сваки прегледни курс из америчке књижевности важно укључити дела која се на различите начине баве категоријама расе, пола и класе, и која помажу нашим студентима да боље разумеју друштвене, политичке и историјске оквири анализе америчке културе.

INTERNATIONAL TOURISM: THE CHARACTERISTICS AND DYNAMICS OF GROWTH IN CONDITIONS OF CRISIS

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Abstract

Judging by the number of travellers, tourism underwent a massive expansion during the second half of the 20th century. The expansion that tourism experienced in the second half of the 20th century continued during the 21st century, with the exception of the periods of the 2008 economic crisis, and the current health crisis (COVID-19 pandemic). In accordance with the aforementioned, it can be pointed out that tourism was in constant progression and development until the crisis, that it was ‘the world’s leading industry’, and that its impact on the process of socio-economic development was continuously growing and intensifying. With this in mind, the aim of this paper is to examine the characteristics and dynamics of the growth of international tourism before, during and after the economic crisis of 2008, as well as during the current health crisis (COVID-19 pandemic), based on relevant macroeconomic indicators. The results of the analysis confirm the well-known facts that tourism is not only very sensitive to crises but also that it is a highly flexible sector that adjusts and resumes the growth of traffic very quickly following the end of a crisis.

Key words: tourism, growth dynamics, economic crisis, health crisis, number of tourists

МЕЂУНАРОДНИ ТУРИЗАМ: КАРАКТЕРИСТИКЕ И ДИНАМИКА РАСТА У УСЛОВИМА КРИЗЕ

Апстракт

Судећи према броју учесника у туристичким путовањима, туризам је током друге половине 20. века постао најмасовнија појава. Експанзија коју је туризам доживео у другој половини 20. века настављена је и током 21. века, изузев за време економске кризе 2008. године, те и за време актуелне здравствене кризе (пандемије COVID-19). У складу са наведеним, могу се истаћи чињенице да се туризам до појаве поменутих криза налазио у непрестаној прогресији и развоју, да је представљао „водећу светску индустрију“, као и да је његов утицај на процес друштвено-економског развоја постајао све већи и интензивнији. Имајући то

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у виду, циљ овог рада је да се на основу релевантних макроекономских показатеља сагледају карактеристике и динамика раста међународног туризма пре, током и после економске кризе из 2008. године, као и током актуелне здравствене кризе (пандемије COVID-19). Резултати анализе потврђују добро познате чињенице да је туризам веома осетљив на кризе, али и да је високо флексибилан сектор који се веома брзо, по престанку кризе, прилагођава и враћа расту промета.

Кључне речи: туризам, динамика раста, економска криза, здравствена криза, број туриста

INTRODUCTION

During the second half of the 20th century, in a relatively short period of time, tourism experienced a remarkable expansion – it is estimated that the average annual growth rate of international tourist arrivals in the period between the years 1950 and 2000 was 5.6% (Gligorijevic et al., 2020). Certain deviations from this tendency were noted in 1968 (as a result of the war conflicts in the Middle East), during the energy crisis of 1974/75, and the milder world economic recession of 1980. However, these deviations did not significantly affect the observed, and previously confirmed, validity of the rapid growth of international tourism, which was more advanced than the economic and overall growth in the world.

The rapid development of tourism, which began in the second half of the 20th century, continued during the first two decades of the 21st century. On account of this, it can be pointed out that tourism was in an almost constant process of progression and development during the previous seventy years. This fact is best confirmed by data detailing the number of people who travelled abroad, i.e. who participated in international tourist movements. In 1950, there were about 25 million tourists, and those numbers steadily increased to reach 286 million in 1980, over 680 million in 2000, over 935 million in 2010, one billion and 200 million in 2015, and about one billion and 460 million tourists in 2019 (UNWTO). When the number of domestic tourists is added to the number of people who travel abroad, which is many times higher, it can be concluded that tourism in modern development conditions is ‘the world’s leading industry’, and that its impact on the development process is becoming more intense (Gligorijevic & Kostadinovic, 2012). According to the World Travel and Tourism Council, tourism is one of the world’s largest economic activities, which has, over time, steadily increased its share in the total world GDP, as well as its share in the rates of employment and trade in goods and services worldwide (World Travel and Tourism Council, Economic Impact Reports). As Pololikashvili (2018) notes:

Around the world, in countries at all levels of development, many millions of jobs and companies depend on a strong and advanced tourism sector. Tourism has also been a driving force in the

protection of natural and cultural heritage, keeping it for future generations to enjoy

(Pololikashvili, 2018, www.unwto.org)

The development of modern tourism, which began during the first decade of the 21st century, has enabled the tourism industry to expand even more significantly on an international scale (Kostadinović, 2019). In this way, tourism has once again confirmed itself to be a very important area of overall economic growth and development, and an important factor in the economic exchange of the world. Tourism enjoys a share in the world's gross domestic product which exceeds 10%, and enables over 6% of the world's exports and about 30% of the world trade in services (Chebly & Said, 2020). Additionally, immediately prior to the COVID-19 pandemic, tourism provided 334 million jobs. In other words, 10.6% of the total number of the world's employed people worked in the tourism industry (World Travel and Tourism Council).

Tourism also ranks fourth in terms of participation in the international trade in goods and services, behind the trade in oil and petroleum products, chemical products and automobiles (UNWTO). This means that tourism can be understood as the driving force of the economic development of all countries, and especially underdeveloped countries, because it leads to the creation of new jobs and an increase in gross domestic product, both of which are of special importance. Consequently, the role and importance of tourism for the overall social and economic development of the world are significantly and permanently increased (Gligorijević & Stefanović, 2012).

However, tourism is very sensitive to both crises that arise under the influence of economic factors and crises caused by factors of a non-economic nature. Since the history of tourism is relatively long, it can be said that tourism has, in the past, often been affected by various crisis events which have had a negative impact on its growth and development (Fink, 1986; Henderson, 2003; Laws, & Prideaux, 2005; McKercher & Hui, 2004). In regards to this, McKercher and Hui (2004) point out that crises "... regularly disrupt the tourism and hospitality industry" (p. 101). Different classifications of crises can be found in literature, but most all classifications consist of four broad and clearly defined categories of crisis events that affect tourism: health problems (various epidemics); natural and environmental disasters (earthquakes or environmental pollution); economic problems (oil shocks, financial and economic crises); and political problems (internal instabilities and wars) (Hall, 2010).

Having in mind the aforementioned facts, the aim of this paper is to consider the characteristics and dynamics of international tourism growth prior to, during, and following the two most pronounced crises in the last two decades – the 2008 economic crisis, and the current health crisis, the COVID-19 pandemic.

THE THEORETICAL AND METHODOLOGICAL APPROACH TO THE RESEARCH

The impact of various crisis events on tourism has, over time, attracted significant attention from a number of researchers (Ritchie, 2004; Evans and Elphick, 2005; Becken and Hughey, 2013). Since tourism is an economic activity that is very sensitive to various instabilities, current literature considers crises to be one of the main factors that determine travel, or the dynamics of tourism growth.

In order to analyse the characteristics and dynamics of growth of international tourism in crisis conditions, this paper focuses on the crisis events that occurred, respectively, near the end of the first and second decades of the 21st century – the 2008 economic crisis and the COVID-19 pandemic. The starting point of the research in this paper is the question of how the aforementioned crises affected the growth dynamics of international tourism. Monographs, papers from individual journals, reports of the World Tourism Organization, and other available publications were consulted in order to obtain an answer to this question. A descriptive analysis of the dynamics of international tourism growth in crisis conditions was performed using relevant macroeconomic indicators, based on theoretical insights and secondary statistical data.

The paper consists of three basic parts. The first part of the paper, briefly analyses the dynamics of growth of international tourism in the period between 1950 and 2007. The second part of the paper examines the dynamics of tourism growth prior to, and following the economic crisis of 2008. The third part of the paper focuses on the dynamics of tourism growth during the period of the COVID-19 pandemic.

INTERNATIONAL TOURISM: THE DYNAMICS OF GROWTH PRIOR TO THE 2008 ECONOMIC CRISIS

The second half of the 20th century and the first decade of the 21st century will remain recorded in the history of tourism as periods in which major changes took place. Namely, significant and diverse (quantitative, qualitative, structural, spatial, economic, sociological, cultural and other) transformations were recorded in both the sphere of tourist demand and the sphere of tourist supply.

As a social and economic phenomenon, i.e. economic activity, tourism is most directly exposed to constant and dramatic changes. The tourist market and tourist traffic are continuously developing, and have, according to many indicators, reached unimaginable proportions (Gligorijević, 2013). Therefore, it can be freely said that no other socio-economic phenomenon has undergone the impressive changes international tourist traffic has. At the same time, tourism has become a world phenomenon, and an integral part of the life of the majority of the world's population.

Indeed, the need for tourism has almost become part of the existential needs of a large portion of the population (Čerović, 2002). The needs of the people living in developed countries, who have a lot of free time and boast considerable economic strength, are an integral part of modern life, which is why they are given ample attention.

The spatial dispersion of tourism has also become impressive. Almost all countries in the world are covered by tourist movements, and act as both emitting and receptive areas. In terms of the influence of both economic and non-economic factors, however, no other socio-economic phenomenon has shown itself to be quite so vulnerable. Fortunately, the vulnerability of tourism is usually temporary due to the fact that tourism trends, and trends in general, are unstoppable. The best indicators of the vitality of tourism are, of course, the large-scale gatherings of people occurring within a specific area and at a given time (world sports championships, the Olympics, international fairs, etc.).

In the period between the years 1950 and 2007, international tourism had a very dynamic growth (Table 1). Interestingly, this dynamic growth was especially notable in the initial decade of the observed period – in the period between the years 1950 and 1960, the growth rate for each year exceeded 10%. However, the rapid growth of international travel during the early post-war years could not be sustained. This is due to the fact that this growth was a consequence of hidden demand which, owing to the post-war conditions and the slow recovery of the economy, could not be satisfied with an adequate supply.

Table 1. International tourist traffic in the period between the years 1950 and 2007

Year	Number of foreign tourists (in millions)	Chained index	Tourist spending (in mild. \$)	Chained index
1950	25,50	100,00	2,10	100,00
1960	69,32	274,84	6,87	327,14
1970	165,79	239,17	17,90	260,55
1980	286,00	168,44	105,32	588,38
1990	458,23	160,22	268,92	255,34
2000	687,30	149,99	473,40	176,04
2001	684,10	99,53	459,50	97,06
2002	702,60	102,70	474,20	103,20
2003	688,80	98,04	525,00	110,70
2004	762,50	110,70	622,00	118,50
2005	806,80	105,81	680,00	109,32
2006	846,30	104,89	742,46	109,11
2007	903,20	106,72	856,00	115,64

Source: <http://www.world-tourism.org>, and author's calculations

Beginning in 1965, the growth rate stabilised in the range between 5 and 6%, so that the average annual growth rate of international tourism in the period between the years 1950 and 2000 was 5.6% for tourist traffic, and 11.4% for tourist consumption (Gligorijević et al., 2020). However, during the first decade of the 21st century, international tourism was, on several occasions, exposed to the effects of unfavourable, primarily non-economic factors.

It must be emphasised that a more serious stagnation in the growth of international tourism occurred at the very beginning of the 21st century. The terrorist events of 11 September 2001 hit the tourism industry hard and shook it severely. In the days that followed, travel and tourist traffic more than halved, and many actors in the tourism industry, among them some with a very long tradition and notable success in business, simply disappeared (Gligorijević & Gligorijević, 2012). In addition, during the first decade of the 21st century, tourism was influenced by numerous epidemics and pandemics (SARS, bird flu, and swine flu, to name a few). However, despite the occasional periods of stagnation, and despite the influence of the aforementioned negative factors, tourism displayed a positive long-term growth trend (Unković & Zečević, 2007).

These, and many other events and factors resulted in the reduction of tourist flows and the emergence of a negative growth rate of international tourist traffic in regards to some years at the beginning of the new century (-0.3% in 2001, and -1.7% in 2003). However, the stagnation lasted for a short time, and ended in 2003. The average annual growth rate of the number of tourists in this period was 0.1%, and tourist spending averaged at 3.5% (Unković et al., 2002).

In the following years, there were signs of a strong recovery. Thus, for example, the number of foreign tourist arrivals increased by 10.1% in 2004, and by 5.4% in 2005. In 2006, record results were achieved – international tourist traffic recorded a further increase of 4.9% with over 846 million foreign tourist arrivals generated, while revenues from international tourism reached 735 billion US dollars, or about 586 billion euros (UNWTO, 2007). In this way, the negative effects of the previously mentioned factors were overcome fairly quickly. Thus, there were positive trends in the development of international tourism, and tourist traffic grew at an average annual rate of 4.1%, while tourist consumption grew at an annual rate of 10.0% in the period between the years 2000 and 2007 (Gligorijević & Gligorijević, 2012).

These trends in international tourism are the result of the numerous and varying factors affecting tourist demand, only some of which are dynamic economic development, the increase in the standard of living, the increase in the population's level of education and interest in culture, the increase in the degree of motorisation and urbanisation, and demographic trends. On the other hand, realising the importance of tourism for

their economic development, and especially for their balance of payments, many countries in the world made strategic decisions aimed at encouraging the development of all of the elements that make up the tourist offer. Here, in particular, great investments with a favourable credit and fiscal policy were made in relation to traffic and other elements of the so-called 'great infrastructure', and in relation to stimulating the construction of accommodations and other conditions that make up the tourist offer. Significant investments were made towards the promotion of tourism development, with the aim of attracting foreign tourists.

INTERNATIONAL TOURISM AND THE 2008 ECONOMIC CRISIS

The economic crisis of 2008, which basically arose in the financial sector, affected most economic activities, including tourism. This crisis took on dimensions not seen since the Great Depression in the late 1920s and early 1930s. Due to the economic crisis, unemployment rates increased, the GDP and personal consumption decreased, and the willingness of tourists to engage in international tourist travel declined¹.

Bearing in mind that tourism appeared in mass form only in the 1950s, we can freely say that world tourism had not faced such an economic crisis before. Countries which faced declining competitiveness even before the crisis began faced additional challenges. Along with all the efforts to innovate and increase the quality of the tourist offer, those countries had to introduce certain restrictive measures which caused social unrest, protests and strikes, all of which had a negative effect on tourist demand².

In accordance with the fact that the growth of international tourism directly correlates with world economic growth, there was a remarkable 6% increase in the number of arrivals in international tourism in the first half of 2008. Conversely, in the second half of 2008, there was a dizzying decline in international tourism. However, owing to the good results which marked the first half of the year, 2008 ended with a growth almost 2% higher than the growth recorded the previous year (Table 2).

¹ The markets of Germany and Great Britain, which are of great importance for the development of tourism in the Mediterranean countries, declined the most.

² Due to the consequences of this crisis, the most important emitting markets, Germany and the USA, implemented measures to stimulate domestic and inbound tourism (including foreign tourists), which led to a decrease in visitors from these countries due to the weakening of the pound against the euro.

Table 2. Results achieved in international tourism in 2008 (in %)

	Total	January-June	July-December
THE WORLD	1,8	5,4	-1,3
Europe	0,1	3,4	-2,5
Asia and the Pacific	1,6	6,3	-2,8
America	3,6	6,8	1,1
Africa	4,6	5,4	4,0
Middle East	11,3	17,8	5,2

Source: UNWTO (2009) World Tourism Barometer, No. 1 Madrid.

The results were weaker the following year despite the initial, relatively optimistic forecasts of the World Tourism Organization, given in January of 2009, which stated that a 2% drop in the number of arrivals could be expected only later during the year. Therefore, the forecasts were revised in June 2009 (Table 3).

According to the forecasts, Europe was to achieve the most unfavourable results, while other regions, especially the regions of Africa and the Middle East, were to achieve significant growth in tourist traffic. However, according to the final results, and under the inevitable influence of the economic crisis, 2009 ended with a 4.2% decline in international tourism (UNWTO, 2010) although some positive results were recorded at the end of the year.

Table 3. International tourism growth forecast for 2009 (in%)

THE WORLD	between	-2 and 0
Europe	between	-3 and 0
Asia and the Pacific	between	0 and 3
America	between	-1 and 2
Africa	between	1 and 4
Middle East	between	2 and 6

Source: UNWTO (2009) World Tourism Barometer, No. 1 Madrid.

Given the facts that the decline in the first half of 2009 was pronounced³ and that growth was observed at the end of the year, a real recovery was noticeable only in the first half of 2010. In this sense, it was realistic to expect that the projected growth in international tourism would be achieved in 2010. Indeed, the World Tourism Organization announced on 17 January 2011 in Madrid that world tourism experienced a rapid recovery in 2010 and recorded a growth of 6.7% in international arrivals. "Driven by a better economic situation internationally, world tourism has recovered quickly from the effects of the financial crisis and eco-

³ This decline is logical, given the extremely good results in the first half of 2008.

conomic recession of late 2008 and 2009,” said the organization, whose headquarters is in the Spanish capital. When announcing the results, Taleb Rifai, Secretary-General of the World Tourism Organization at the time, said that “Tourism has once again proved to be a very resilient sector”.

Compared to the 920 or 930 million international tourist arrivals expected, the realized growth of traffic in 2010, as already mentioned, was 6.7%, or 956 million international tourist arrivals. With this, world tourism surpassed even the pre-crisis period, when 913 million tourist arrivals were recorded. At the same time, the report of the World Tourism Organization said that “... all regions have seen growth in international tourist arrivals, and booming economies are the main drivers of that progress”. The results are “... better than the experts predicted,” Rifai said at the press conference, adding that “... the most important thing is that we managed to rise to the level above 2008 and now the main challenge is to keep that progress, which will not be an easy task” (UNWTO, 2012).

Therefore, the economic crisis had a negative impact on the growth of international tourism. However, it must be emphasized that, in spite of the strong effect of this crisis, tourism once again proved to be a very resilient and highly flexible sector, i.e. a sector that returned to traffic growth very quickly, as soon as the world economy showed the first signs of recovery. Driven by a better economic situation internationally, world tourism quickly recovered from the effects of the economic crisis of the second half of 2008 and 2009, and continued to grow dynamically.

The dynamic growth of international tourism in the period between the years 2010 and 2019 is a consequence of, among other factors, the diversification of tourist services, easier international travel, the modernisation of means of transport, and the increase of disposable income for tourists in developing countries. The development of tourism, and especially the development of its international component, has been recognised by a large number of countries as a desirable means of economic development. This is supported by data on the number of international tourists and their effects (Table 4).

Table 4. International tourist traffic in the period between the years 2010 and 2019

Year	Number of foreign tourists (in millions)	Chained index	Tourist spending (in mild. \$)	Chained index
2010	956	100	981	100
2013	1.100	115	1.222	125
2015	1.203	126	1.226	125
2017	1.332	139	1.350	138
2019	1.454	152	1.494	152

Source: UNWTO, 2021, and author’s calculations

Based on the data presented in Table 4, it can be concluded that the number of international tourist arrivals in the observed period increased by almost 500 million – the number of foreign tourists recorded in 2010 was 956 million, as opposed to the 1 billion and 454 million tourists recorded in 2019.

The dynamic trends in international tourism in the period following the economic crisis are the result of numerous and diverse factors, only some of which are dynamic economic development, the increase in the standard of living, the increase in the population's level of education and interest in culture, the increase in the degree of motorisation and urbanisation, demographic trends, and foreign tourist demand. On the other hand, realising the importance of tourism for their economic development, and especially for their balance of payments, many countries in the world made strategic decisions related to encouraging the development of all elements that make up the tourist offer. Here, in particular, great investments with a favourable credit and fiscal policy were made in relation to traffic and other elements of the so-called 'great infrastructure', and in relation to stimulating the construction of accommodation and other conditions that make up the tourist offer. Significant investments were made towards the promotion of tourism development, with the aim of attracting foreign tourists.

INTERNATIONAL TOURISM AND THE HEALTH CRISIS

During the first two decades of the 21st century, the world was faced with several health crises, or epidemics and pandemics, only some of which are: SARS (2003); the bird flu, or H5N1 (2005); the swine flu, or H1N1 (2009); the Middle Eastern Respiratory Syndrome, or MERS (2012); the ZIKA virus (2015) and COVID-19, caused by the SARS-2 corona virus (2019) (Đurović et al., 2020). The most severe negative effects were caused by the SARS-2 corona virus, which spread globally in 2020 (the World Health Organization officially declared the COVID-19 pandemic on 11 March 2020), and which is still ongoing.

The health crisis caused by the COVID-19 pandemic began when the corona virus appeared in Wuhan, a city in the Chinese province of Hubei, at the end of 2019. It is a virus which causes acute respiratory syndromes (SARS), and which is mainly transmitted from animals to humans (Uğur & Akbıyık, 2020).

At the beginning of 2020, the virus spread to the rest of the world (in the first half of the year to the European Union and the USA, and in the second half of the year to the southern hemisphere), and literally transformed and paralysed the whole world, the relatively stable world economy, and the high standard of living of a large part of the world's population. The virus quickly caused chaos around the world due to the secrecy surrounding specif-

ic pieces of information, the spread of unconfirmed and inaccurate information, conflicting theories about the new virus and its origin, and the characteristics of the disease caused by the virus.

No country in the world was adequately prepared to face the consequences of such an intense pandemic in a timely manner. This remained true even for countries whose healthcare systems are well-developed and boast a substantial number of doctors and medical staff capable of helping and caring for infected and sick people.

The measures introduced by each country to combat the pandemic varied greatly. Namely, some countries, such as the People's Republic of China, introduced extremely restrictive measures – at the very beginning of the pandemic, China closed its borders and introduced quarantine, i.e. the complete isolation of the entire population.

Later, when the pandemic spread and affected a number of countries, many governments applied the Chinese model, which proved to be very effective. The application of some degree of quarantine, effective though it may have been, left negative consequences on the economies of many countries (Vassileva et al., 2020). By March 2020, some degree of quarantine was implemented in most countries, which resulted in the lock-down of over 90% of the world's population (Gössling et al., 2020). In contrast, some countries, such as Sweden, had only mild bans, which were combined with voluntary measures based on the invocation of the citizens' personal responsibility.

One characteristic of the COVID-19 pandemic is that it affected all countries, regardless of their level of development, and all people, regardless of age, education or wealth. People were thrown into chaos, despite the fact that they had never had more information about a virus. The cause of such chaos and panic was the fact that the credibility of available information had never been more questionable.

The COVID-19 pandemic also had a very negative impact on the economies of many countries. Namely, a large number of hitherto profitable branches of the economy stopped operating, and a large number of workers were fired. A large number of countries provided financial assistance to their citizens, as well as fiscal relief and assistance to the economy, but these measures were of a one-time nature and were temporally limited.

The greatest losses during the COVID-19 pandemic were so far suffered by, of course, activities belonging to the tertiary sector of the economy. The tertiary sector reduced its activities due to the decrease in demand caused by the application of restrictive measures. This primarily refers to service activities related to the movement of people from one country to another - air traffic (Stanojević et al., 2021) and tourism. The COVID-19 pandemic has revealed the existence of a strong link between

tourism and health at the local, regional, national and international levels (Kranjčević, 2020).

When it comes to tourism, the data of the World Tourism Organization shows that the biggest decline in international tourist arrivals was recorded in the first half of 2020 (January-June). Compared to the data related to the same period (January-June) in 2019, the decline recorded in 2020 measured 93%. (UNTWO, 2020).

This reduction in the number of tourists in the first half of 2020 is a result of the fact that many countries around the world closed their borders and introduced various restrictions in order to combat the pandemic. The measures taken to prevent the spread of COVID-19, such as social distancing, travel and movement bans, community movement bans, and self-isolation, stopped global travel, tourism and leisure activities (Sigala, 2020).

Different types of restrictions, ranging from partial to almost complete quarantine, led to the number of foreign tourists falling from the 1,454 million recorded in 2019 to 403 million in 2020 (Table 5).

Table 5. International tourist traffic in the period between the years 2020 and 2021

Year	Number of foreign tourists (in millions)	Decrease compared to 2019	Tourist spending (in mild. \$)	Decrease compared to 2019
2020	403	- 73%	549	- 63%
2021	421	- 71%

<https://www.unwto.org/global-and-regional-tourism-performance>

The decline 'returned' international tourism to the level of development it boasted more than three decades ago, at the end of the penultimate decade of the 20th century. At the same time, in regards to tourist regions, Europe and America had a 68% decline in tourist arrivals, and Africa and the Middle East had a 76% decline. Asia and the Pacific were most affected by the COVID-19 pandemic, and recorded an 84% decline in tourist arrivals (UNWTO).

A decline in the number of foreign tourists was also recorded in 2021, and is only slightly lesser (-71%) than the one recorded in 2019. Bošković et al. (2021) note that:

Such tendencies of international tourism have significantly reduced the effect that tourism has had in previous decades on the development of many economies. According to preliminary data from the World Tourism Organization, the direct loss from international tourism in 2020 amounted to about \$1,300 billion, which is over 11 times greater loss than during the global economic crisis in 2009

(Bošković et al., 2021, p. 274)

The circumstances which befell world tourism during 2020, as well as during 2021, are, of course, unprecedented (Jović Bogdanović et al., 2021).

The COVID-19 pandemic has managed to change the way people around the world live, travel, work (work from home), study (online classes), and socialise, get to know each other, and form close relationships. The newly adopted forms of behaviour became habits during 2020 and 2021.

The trend of international arrivals is expected to change during 2022, as travel restrictions are expected to be lifted, and the availability of vaccines is expected to restore passengers' confidence. However, it will take about 3 to 4 years to achieve results related to international tourist arrivals as positive as those recorded in 2019.

CONCLUSION

As a kind of socio-economic phenomenon, tourism is an activity that has taken on global dimensions because it is characterised by a large number of participants (foreign and domestic) in tourist travel. This number, according to some estimates, reaches up to four billion people. All the aspects of the tourist market's dimensions are constantly expanding. Its structural forms are expanding. However, tourism is very sensitive to crises both economic and non-economic in nature (terrorist acts, epidemics, natural disasters, etc.). However, tourism has always shown an exceptional ability to recover.

The economic crisis, which began to manifest itself in the second half of 2008, also had a strong impact on the development of international tourism. However, on that occasion, tourism proved to be a highly flexible sector, that is, a sector which very quickly, as soon as the world economy showed the first signs of recovery, returned to the growth of traffic.

Due to the health crisis (the COVID-19 pandemic), there was a drastic drop in tourist travel. According to the World Tourism Organization, this crisis will have far greater negative consequences than the economic crisis of 2008, when international tourist arrivals declined by 4%, or the health crisis of 2003, when SARS led to a 0.4% decline in tourist arrivals.

Developed countries that have developed tourism are most affected by the health crisis or pandemic, and they are facing great losses and a threat to the existence of a large number of inhabitants. The fact is that tourism has suffered the biggest blow of all economic flows.

According to the estimates of the World Tourism Organization, the loss in tourism due to the pandemic will amount to several thousand billion dollars. However, it is expected that tourism will recover from this crisis the fastest, since it is an extremely resilient and flexible economic sector.

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МЕЂУНАРОДНИ ТУРИЗАМ: КАРАКТЕРИСТИКЕ И ДИНАМИКА РАСТА У УСЛОВИМА КРИЗЕ

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Резиме

Туризам је током друге половине 20. века доживео своју пуну експанзију и данас, сасвим сигурно, представља један од најзначајнијих друштвено-економских феномена и савремених достигнућа. Туризам је, наиме, заузео једну од водећих позиција у привреди света, док је у неким земљама остварио и примат у односу на остале привредне делатности. Туризам се, тиме, потврђује као важно подручје укупног привредног развоја и као битан фактор у светској економској размени.

Економска криза, која је почела половином 2008. године, погодила је већину привредних делатности, укључујући и туризам. Услед економске кризе, дошло је до повећања стопе незапослености, смањења бруто домаћег производа и личне потрошње, те је и спремност туриста да се укључе у међународна туристичка путовања била умањена. Према процени стручњака Светске туристичке организације датој 18. јануара 2010. године у Мадриду, број учесника у међународном туризму смањено се за 4,2%. То значи, да је у 2009. години било око 42 милиона туриста мање него 2008. године.

Под утицајем споменуте кризе, 2009. година закључена је са падом у међународном туристичком промету. Међутим крајем године су ипак забележени позитивни резултати. То значи да је процес опоравка туризма отпочео те године, а то су резултати остварени у 2010. години и потврдили. При томе, ток опоравка међународног туризма, генерално посматрано, ишао је у облику слова В, као што је то био случај и приликом ранијих криза које су погађале ову индустрију. Томе је посебно допринела комбинација мера које су предузете не би ли се ублажили негативни ефекти кризе и не би ли се стимулисала туристичка потражња. Опоравак међународног туризма није био угрожен иако су у истом периоду били актуелни пандемија грипа А(H1N1) и застој у авио-саобраћају због ерупције вулкана на Исланду, која се одразила на путовања из Европе и ка њој.

Услед здравствене кризе (пандемија COVID-19), дошло је драстичног пада туристичких путовања. Подаци Светске туристичке организације показали су да је међународни туризам у 2020. години забележио пад од 73%, што је резултирало и смањеним приходом од 549 милијарди америчких долара. Број страних туриста у 2021. години забележио је пад од 71%. Према подацима Светске туристичке организације, ова криза ће имати далеко веће негативне последице од економске кризе 2008. године, када су доласци међународних туриста опали за 4%, или здравствене кризе 2003. године, узроковане вирусом SARS, када су доласци међународних туриста опали за 0,4%.

Здравственом кризом, односно пандемијом COVID-19, највише су погођене развијене земље које имају развијен туризам, јер се оне суочавају са великим губицима и угроженом егзистенцијом великог броја њихових становника. Чињеница је да је туризам доживео највећи ударац од свих економских токова. Према проценама Светске туристичке организације, губитак у туризму због пандемије износиће најмање 1.300 милијарди долара. Међутим, очекује се да ће се управо туризам најбрже опоравити од ове кризе, будући да је изузетно флексибилан и прилагодљив сектор.

CONSUMER BEHAVIOUR IN TOURISM DURING THE COVID-19 PANDEMIC

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Abstract

The subject of this paper is the behaviour of consumers in relation to travel planning during the COVID-19 pandemic. The aim of this paper is to examine and understand the behaviour of travellers during the pandemic. Theoretically, the paper relies on the results of previous research on the impact of health crises on tourism and consumer behaviour. The specificity of this work is reflected in the respondents, belonging to Generation Y (Millennials) and Generation Z, which took part in this empirical research. This paper examines the respondents' intentions in planning a vacation during the pandemic, as well as the degree to which fear affects travel planning abroad. The results of this empirical research, conducted in the Republic of Serbia in May 2021, prove that a significant percentage of Generation Y and Generation Z travelled during the pandemic, prior to May 2021 (25% abroad, 56% in Serbia), and that they plan to travel both in Serbia (64%) and abroad (74%) in the near future.

Key words: consumers, travel, pandemic, Generation Y, Generation Z

ПОНАШАЊЕ ПОТРОШАЧА У ТУРИЗМУ ТОКОМ COVID-19 ПАНДЕМИЈЕ

Апстракт

Предмет рада је понашање потрошача приликом планирања путовања током COVID-19 пандемије. Циљ рада је да се испита и разуме понашање путника током пандемије. Рад се теоријски ослања на резултате досадашњих истраживања утицаја здравствене кризе на туризам и на понашање потрошача. Специфичност рада огледа се у емпијском истраживању које се односи на испитанике генерације Y (миленијалце) и генерације Z. Испитане су њихове намере у планирању путовања током пандемије, као и колико страх утиче на планирање путовања у иностранство. Емпијско истраживање, спроведено у Републици Србији током маја 2021. године, доказује да је значајан проценат генерација Y и Z путовао током пандемије, све до маја 2021. године (25% у иностранство, 56% унутар Србије), те и да припадници обе

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генерације у блиској будућности планирају путовања и унутар Србије (64%) и у иностранство (74%).

Кључне речи: потрошачи, путовање, пандемија, генерација Y, генерација Z

INTRODUCTION

The consequences of the COVID-19 pandemic on the economy have shown that non-economic and non-financial factors can have very significant economic and financial effects on a global level, and that they can appear as triggers for the onset of an economic recession (Praščević, 2020, p. 20). Perčić and Mamula Nikolić (2020) note:

In the midst of the health crisis, the economic crisis is inevitable, so the trends regarding savings and reduction of consumption are evident in the world, and in Serbia, to a significant extent.

(Perčić & Mamula Nikolić, 2020, p. 89)

When it comes to crises that affect tourism, we can define them as an unexpected event which can affect the traveller's confidence in the destination, and which interferes with the possibility of normal business operations (Milićević & Ervaćanin, 2016, p. 54). The conditions in which tourism takes place today impose the need to prepare adequate responses even to unexpected events, which requires solidarity, flexibility and expertise. Crises within the tourism and hospitality industry must be handled with particular care for a number of reasons. The majority of the industry relies on the consumers' discretionary expenditure (Gatsou, Gray & Niininen, 2005). This means that organisations within the industry are particularly sensitive to ill-will, since the purchase of the product, or service, is not fundamentally important to the consumers, and they can (relatively) easily go without (Gatsou et al., 2005).

The subject of this paper is consumer behaviour in relation to travel planning during the COVID-19 pandemic. *The aim of this paper* is to examine and understand the behaviour of travellers during the pandemic. The conducted desk and field research contributes to our understanding of the effects of the COVID-19 pandemic on consumer behaviour in the world and in Serbia. Special emphasis is placed on travel planning during the pandemic, which may provide useful information to organisations within the tourism and hospitality industry for formulating new marketing strategies. The specificity of this paper is reflected in the respondents, belonging to Generation Y and Generation Z, which took part in this empirical research.

THE IMPACT OF HEALTH CRISES ON TOURISM

The impact of health crises on domestic and international tourism attracts the attention of researchers from various scientific fields. Several serious crises, such as the H1N1 epidemic, the SARS epidemic, the Ebola virus epidemic which affected the African continent (Milićević & Ervaćanin, 2016, p. 52), and the COVID-19 pandemic, have affected the development of tourism in the world. Epidemics and pandemics have negative effects on the tourism and hospitality industry (Abrantes, Abrantes, Silva, Reis & Seabra, 2021; Güliz Uğur & Akbıyık, 2020; Kovačević, Pindžo & Zečević, 2020; Mulder, 2020; Shapoval et al., 2021), because they reduce international travel and air traffic, and cause the cancellation of accommodation reservations and sports, entertainment and cultural events. These events are often accompanied by huge losses and a general decline in activity.

COVID-19 landed numerous airline fleets and closed hotels around the world. The sharp decline in global travel led to a decline in the aviation industry's financial performances. The year 2020 ended with commercial airlines' passenger revenue amounting to 189 billion USD. This reflected a significant decrease in comparison with the 581 billion USD reported before the pandemic (Mazareanu, 2021b). Due to the coronavirus pandemic, in 2020, the number of scheduled passengers boarded by the global airline industry dropped to just over 1.7 billion people, which represents a 61% decline in global air passenger traffic (Mazareanu, 2021a). As a result of the COVID-19 pandemic, the hotel industry suffered great losses in 2020. In May 2020, hotels in Europe reported an occupancy rate of 13%, which reflected a dramatic 82% decrease in comparison with the occupancy rate reported the previous year (Lock, 2021a).

According to a report by the United Nations World Tourism Organization (UNWTO, 2021), the global tourism sector lost 1,300 billion USD in 2020 as a result of the restrictions placed on movement due to the COVID-19 pandemic. This figure represents a loss more than 11 times greater than the loss recorded during the World Economic Crisis in 2009. Also, compared to the turnover in 2019, the turnover of tourists in the world fell by 74% in 2020. In contrast with the same period in 2020, the number of international tourist arrivals decreased, on average, by 85% in the period between January and May 2021. Asia and the Pacific (-95%), Europe (-85%), the Middle East (-83%), Africa (-81%) and the Americas (-72%) suffered the most from the decrease in the number of international tourist arrivals (UNWTO, 2021). The region predicted to suffer the highest decline in revenue from travel and tourism was Europe, which was to report a revenue of roughly 124 billion USD in 2020, compared to the 211.97 billion USD reported in 2019 to (Lock, 2021d).

THE IMPACT OF THE COVID-19 PANDEMIC ON CONSUMER BEHAVIOUR

Research on the impact of the pandemic on consumer behaviour in the world and in Serbia shows how much consumer behaviour has changed under the influence of COVID-19, and the uncertainty, fear of infection and the various restrictions related to the pandemic. These changes in consumer behaviour likewise refer to consumer travel plans. Shamshiripour, Rahimi, Shabanpour and Mohammadian (2020) noted the consumers' tendency to avoid further travelling, especially by plane, and Turnšek, Brumen, Rangus, Gorenak, Mekinc and Štuhec (2020) noted that consumers who travelled more often before the pandemic showed the least tendency towards avoiding travel during the pandemic. The number of global air passengers decreased drastically in 2020 – over 4.5 billion passengers travelled globally before the pandemic, and roughly 1.76 billion people opted to travel after the virus began to spread. Individuals also reported that price and the declared aircraft cleaning policies were the factors wielding the most influence on their decision (not) to travel in the aftermath of the COVID-19 pandemic (Mazareanu, 2021b).

Travellers became more aware of the need to avoid health risks when travelling. According to a global survey from July 2020 (Lock, 2021c), 81% of respondents from India and 65% of respondents from the USA stated that they believe accommodations should use advanced technologies to make them feel safer. Additionally, over half of the guests staying in hotels stated that they would prefer to check in/out via a hotel app, rather than risk doing so in person. Meanwhile, 30% preferred to use a website, and only 8% of the respondents preferred using a public kiosk (Lock, 2021b).

With global travel restrictions still in effect, many travellers are looking for getaway destinations closer to home, and that is unlikely to change anytime soon. The intent to travel domestically continues to rise, especially in Germany, Italy, Poland, Spain, Turkey, and the UK (Abdelkawi & Giorgini, 2021). In general, during the summer of 2020, many tourist facilities depended on domestic tourists, and the tourists, on the other hand, were more or less 'forced' to discover or rediscover the beauties of their country. One of the ways to encourage domestic tourism during a pandemic is to promote the increasingly sought-after camping tourism (especially luxury camping) (Sommer, 2020).

During July 2020 (Donovan, 2021), Booking.com conducted a survey in 28 countries. The results of the survey show that travellers around the world (53%) expressed a desire to explore the world in a more sustainable way, and to become more environmentally oriented. According to this research, 63% of tourists intended to avoid crowded tourist attractions, 51% intended to avoid travelling during the season, and 48% intended to visit alternative destinations so as to prevent overcrowding. Ac-

ording to the survey conducted by Booking.com in March 2021, which spanned 30 countries, 68% of travellers wanted the money they spend on travel to go to the local community, and 84% planned to reduce their waste and recycle plastic products during travelling (Donovan, 2021).

Millennials and Generation Z are the most important generations for the economy. The number of Millennials in the total population ranges from 20% in Europe to 24% in Asia (MSCI, 2020). According to View from ILTM, Millennials are more likely “to be conflated with their younger Gen Z counterparts, with the assumption being that their financial power is limited“ (View from ILTM, 2020).

According to Expedia Group (2021), Gasdia and Jackson (2020), GlobalData (2020), and View from ILTM (2020), young travellers are vital to the recovery of the tourism sector. Generation Y and Generation Z travellers are the most likely to go on international trips once the restrictions are lifted. Millennials are willing to take more risks, and plan to travel sooner than other generations (Kavanagh, 2020). The respondents of a study about the behaviour of young generations in the COVID-19 context (Seabra, AlAshry, Çınar, Raja, Reis & Sadiq, 2021) agreed that the pandemic has had a strong impact on their daily lives, and a majority of them revealed that they are afraid they might catch the virus as tourists (85%). Half of the respondents agreed that many aspects of their lives would undergo a number of modifications, all of which would affect their lives and routines, and their travel and vacation plans, due to their fear of the virus.

According to the research of Stojanović and Vukov (2020), young people in Serbia, aged 15 through 30, felt threatened during the state of emergency. Curiously, this feeling was expressed more frequently by people with a higher level of education. More than half of the young people who participated in the research (52%) expressed concerns about uncertainty. One third of them were afraid that they would lose their jobs during the state of emergency. The income of 42% of young people declined during the state of emergency, and the income of 32% of the respondents declined after the state of emergency. When it comes to tourism, the respondents of another research in Serbia, conducted by Lazarević and Marinković (2021), reported a significant change in their habits in relation to the use of public transport and travel abroad. In other words, as opposed to their tendencies during the period leading up to the pandemic, the respondents showed a tendency to avoid public transport, and a tendency to spend vacations in their country during the pandemic.

The study “Index of changes in consumer habits”, conducted by the EY in Serbia in December 2020 (EY, 2021), showed that 41% of respondents believe that their fear of COVID-19 will cease to affect their lives in approximately two years. However, there are those who claim that the fear of the pandemic will disappear in three to five years. According to the same EY survey, out of the 1,000 respondents from Serbia,

64% agreed that their lifestyle had changed significantly compared to the period before the pandemic, and 60% expressed the belief that they are coping well with the pandemic and are not overly optimistic about returning to normal. Additionally, 69% of the respondents expressed care about the Serbian economy, and 59% claimed that they were trying to save more. As 34% of respondents from Serbia believe that the way they travel will change in the future, almost half of the people in this group (46%) agreed they should take precautions, such as wearing masks, during travelling. A slightly higher percentage of global respondents expressed the same attitude (50%). Furthermore, 44% of respondents who believe that their travels will change in the long run expect to spend less on travel than they did before. With pessimistic views on future travel, 41% of respondents who predict changes in travel habits think that they will spend less time in other countries, and 31% plan to permanently replace international plans with local ones, and to drive to their destinations rather than use airplanes. According to the comparison of the results of the EY surveys conducted in Serbia and globally, consumer expectations, essentially, do not differ much around the world. In February 2021, EY conducted another global survey on the same topic. This survey showed that the level of optimism expressed by the respondents has decreased, so that only 27% of global respondents expressed the opinion that their fear of the virus will stop affecting their lives after a year or two (EY, 2021).

METHODOLOGY

Survey research was conducted in written form, via questionnaire. The online questionnaire was designed specifically for the purpose of this research and was distributed to respondents aged 20 through 40 (to members of Generation Z and Generation Y), in the period between 9 May and 21 May 2021. Respondents from all regions of Serbia were included. Consumer intentions in relation to travel plans during the pandemic were examined.

The sample is stratified and consists of 300 respondents – 150 respondents belonging to Generation Z (aged 20 through 26), and 150 respondents belonging to Generation Y, or the Millennial generation (aged 27 through 40). The responses of older members of Generation Z, who can make travel decisions and travel independently, were taken into account. The respondents comprising the sample differed in gender (50% of respondents are male, 50% are female), employment status (36% of respondents are students, 51% are employed and 13% are unemployed), and level of monthly income during the pandemic (20% of respondents reported a below average income, 69% reported an average income and 11% reported their income to be above average). The statistical error of the sample is 5.6%.

SPSS was used for data processing and analysis, and for the interpretation of the obtained research results. The following quantitative statistical methods were used: descriptive statistics (frequency distribution, arithmetic mean, standard deviation) and comparative statistics (Pearson's χ^2 -test, t-test, ANOVA test, regression and correlation). Some questions in the questionnaire were formulated in the form of a five-point Likert scale.

Based on the review of the existing literature on this topic (Abdelkawi & Giorgini, 2021; Donovan, 2021; EY, 2021; Lazarević & Marinković, 2021; Seabra, AlAshry, Çınar, Raja, Reis & Sadiq, 2021; Sommer, 2020) and the authors' assumptions, the following research hypotheses were defined:

Research hypothesis H₁ – There is a statistically significant difference in the responses of the respondents from Serbia in relation to vacation planning during the pandemic, caused by the differences in the respondents' gender, age, and level of income;

Research hypothesis H₂ – There is a statistically significant difference in the respondents' answers in relation to vacation planning abroad during the pandemic, caused by the differences in the respondents' gender, age, and level of income;

Research hypothesis H₃ – Fear of uncertainty impacts travel planning abroad during the pandemic, and there is a statistically significant negative correlation between these two variables;

Research hypothesis H₄ – Negative motivation of consumer behaviour in travel planning during the pandemic is revealed by the respondents' answers.

RESEARCH RESULTS

As much as 70% of the respondents belonging to Generation Y and Generation Z like to plan trips in advance (Table 1), which is in opposition with the changes brought about by the pandemic. During the pandemic, prior to May 2021, 25% of respondents travelled outside Serbia, 56% travelled within Serbia, and 19% did not travel anywhere. A higher percentage of female respondents travelled within Serbia during the pandemic (59%) compared to male respondents (52%), while a higher percentage of male respondents travelled abroad (31%) compared to female respondents (19%). There is no statistically significant difference in the respondents' responses about travelling during the pandemic in relation to gender (χ^2 -test, Value = 5.847^a, df = 2, p = 0.054 > 0.05). During the pandemic, 23% of Generation Z and 28% of Generation Y travelled abroad, and 61% of Generation Z and 51% of Generation Y travelled within Serbia. On the other hand, 17% of Generation Z and 21% of Millennials did not travel anywhere during the pandemic. There is no statistically significant difference in the answers of the respondents in relation to their age (χ^2 -test, Value = 3.049^a, df = 2, p = 0.218 > 0.05). When the level of income is taken into consideration, 6% of below

average income respondents, 28% of average income respondents and 64% of above average income respondents travelled abroad during the pandemic. Additionally, 34% of below average income respondents, 65% of average income respondents and 21% of above average income respondents travelled within Serbia. According to the χ^2 -test (Value = 94.729a, df = 4, p = 0.00 < 0.05), there is a statistically significant difference in the respondents' responses in relation to their level of income as concerns travelling during the pandemic (abroad or in Serbia).

Table 1. Distribution of respondents (N = 300) according to the degree of agreement with the statements in the questionnaire

Questions	I totally agree	I partially agree	I neither agree nor disagree	I partially disagree	I do not agree at all	Mean	Std. Deviation
I like to plan trips in advance.	48%	22%	23%	5%	2%	4.09	1.048
During the pandemic, I plan to go on vacation to a place in Serbia in the near future.	42%	22%	15%	10%	11%	3.72	1.393
During the pandemic, I am afraid to go on a trip to another country.	13%	19%	21%	15%	32%	2.67	1.426
During the pandemic, I plan to go on vacation abroad in the near future.	59%	15%	10%	9%	7%	4.12	1.276

* The questions listed in the table are in the form of a five-point Likert scale, where the answer *I totally agree* is assigned a value of 5; *I partially agree* - 4; *I neither agree nor disagree* - 3; *I partially disagree* - 2; *I do not agree at all* - 1.

Source: Authors' research

According to Table 1, a larger percentage of Generation Y and Generation Z respondents plan to vacation abroad (74%), compared to those planning to vacation in Serbia (64%). One of the questions in the questionnaire referred to the feeling of fear of going on a trip to another country during the pandemic, and 32% of the respondents stated that they are afraid to go abroad. If fear is viewed as an independent variable in this context, it determines 15% of the variability of *going abroad during the pandemic* (as a dependent variable) ($R^2 = 0.150$, B coefficient = -0.346, Beta coefficient = -0.387, t = -7.238, p = 0.00). Therefore, the independ-

ent variable exerts a certain influence on the dependent variable. A statistically significant negative correlation, moderate by strength, exists between these two variables (Spearman's rho coefficient = -0.338, $p = 0.00$). In other words, the increasing fear of going on a trip to another country, to some extent, results in fewer plans to vacation abroad.

Table 2. Testing for statistically significant differences in the answers of the respondents in relation to gender, as concerns the stated questions

Questions in the questionnaire	t	df	p
I like to plan trips in advance.	-0.495	298	0.621
During the pandemic, I plan to go on vacation to a place in Serbia in the near future.	4.625	298	0.000*
During the pandemic, I am afraid to go on a trip to another country.	-3.248	298	0.001*
During the pandemic, I plan to go on vacation abroad in the near future.	2.791	298	0.006*

* An asterisk indicates the existence of a statistically significant difference (where $p < 0.05$).

Source: Authors' research

According to the results of the t-test (Table 2), there is a statistically significant difference in the responses of Generation Y and Generation Z respondents in relation to gender as concerns vacation planning in Serbia during the pandemic. A higher percentage of male respondents stated that they would travel to a place in Serbia (Mean = 4.08) compared to female respondents (Mean = 3.36). In other words, 71% of male respondents and 56% of female respondents said that they plan on vacationing in Serbia during the pandemic. According to the results of the t-test, there is a statistically significant difference in the responses of the respondents in relation to gender, as concerns the feeling of fear of travelling to another country during the pandemic. Female respondents feel greater fear (Mean = 2.93) compared to male respondents (Mean = 2.41). In other words, 38% of female respondents and 26% of male respondents said that they are afraid to travel abroad during the pandemic. There is also a statistically significant difference in the respondents' responses in relation to gender, as concerns vacation planning abroad, according to the results of the t-test shown in Table 2. A higher number of male respondents stated that they plan to travel abroad (Mean = 4.32) compared to female respondents (Mean = 3.91). In other words, 82% of male respondents and 67% of female respondents stated that they plan on travelling abroad.

Table 3. Testing for statistically significant difference in the answers of the respondents in relation to their age group (generation), as concerns the stated questions

Questions	t	df	p
I like to plan trips in advance.	-2.957	298	0.003*
During the pandemic, I plan to go on vacation to a place in Serbia in the near future.	0.911	298	0.363
During the pandemic, I am afraid to go on a trip to another country.	-1.993	298	0.047
During the pandemic, I plan to go on vacation abroad in the near future.	-1.679	298	0.094

* An asterisk indicates the existence of a statistically significant difference (where $p < 0.05$).

Source: Authors' research

According to the results of the t-test (Table 3), there is a statistically significant difference in the answers of the respondents in relation to their age group as concerns the tendency to plan trips in advance. More respondents in the Millennial age group (Mean = 4.27) than respondents in the Generation Z age group (Mean = 3.91) prefer to plan trips in advance. In other words, 77% of Millennials and 63% of Gen Z respondents like to plan their trips in advance. According to the results of the t-test, there is no statistically significant difference in the responses of different generations as concerns vacation planning in Serbia during the pandemic – 65% of Gen Z and 63% of Millennials plan to vacation in Serbia. A higher percentage of members belonging to Generation Y (34%) feel afraid to go abroad, compared to members belonging to Generation Z (30%). There is also no statistically significant difference in the answers of different generations as concerns planning a vacation abroad. According to the results of the t-test, shown in Table 3, 71% of Generation Z and 79% of Generation Y plan to vacation abroad during the pandemic.

Table 4. Testing for statistically significant differences in the answers of the respondents in relation to their level of income, as concerns the stated questions

Questions	Sum of Squares	df	Mean Square	F	p
I like to plan trips in advance.	4.256	2	2.128	2.041	0.132
During the pandemic, I plan to go on vacation to a place in Serbia in the near future.	4.633	2	2.317	1.178	0.310
During the pandemic, I am afraid to go on a trip to another country.	25.508	2	12.754	6.462	0.002*
During the pandemic, I plan to go on vacation abroad in the near future.	13.351	2	6.675	4.015	0.019*

* An asterisk indicates the existence of a statistically significant difference (where $p < 0.05$).

Source: Authors' research

According to the results of the ANOVA test (Table 4), there is no statistically significant difference in the responses of respondents of different income levels in relation to vacation planning in Serbia during the pandemic. In the near future, 64% of respondents with below average income, 62% of respondents with average income, and 75% of respondents with above average income plan to travel around Serbia. There is a statistically significant difference in the responses of respondents of different income levels in relation to the feeling of fear of going abroad – 38% of respondents with below average income, 35% of respondents with average income, and 14% of respondents with above average income agree with the statement that there is fear of travelling outside Serbia. Also, there is a statistically significant difference in the responses of respondents of different income levels in relation to travel planning abroad during the pandemic – 66% of respondents with below average income, 72% of respondents with average income, and 100% of respondents with earnings above average plan to travel abroad.

DISCUSSION

There is a statistically significant difference in the respondents' responses in relation to their gender, as concerns vacation planning in Serbia and abroad during the pandemic. In other words, a higher percentage of male respondents stated that they plan to vacation in Serbia (71%) and abroad (82%) compared to female respondents (56% plan to vacation in Serbia, and 67% plan to vacation abroad). *Hypothesis H₁ is only partially confirmed* – there is only a statistically significant difference in the responses of the respondents in relation to gender as concerns vacation planning in Serbia during the pandemic. *Hypothesis H₂ is mostly confirmed* – there is a statistically significant difference in the responses of the respondents in relation to gender and level of income as concerns plans to vacation abroad during the pandemic. The highest percentage of respondents with above average income (100%) and the lowest percentage of respondents with below average incomes (66%) plan to travel abroad during the pandemic.

Fear of uncertainty is one of the reasons why a part of the respondents opted not to go on vacation abroad. Fear of uncertainty exerts a certain influence on plans to vacation abroad during the pandemic. As there is a statistically significant negative correlation between these two variables, *hypothesis H₃ is confirmed*.

The results of this research refute hypothesis H₄. The assumption was that a negative motivation to travel during the pandemic would be observed, but the results of the research prove that a considerable percentage of Generation Y and Generation Z travelled during the pandemic, and that they plan to travel both within Serbia and abroad. Additionally, 47%

of respondents do not feel afraid to go on a trip to another country, and, where fear is present, it negatively and very moderately affects vacation planning abroad. The percentage of consumers who plan a vacation abroad has tripled in comparison with the number of trips made during the pandemic, prior to May 2021 (from 25% to 74%). The percentage of consumers who plan to vacation in Serbia is 64%, which marks an increase of 8% in relation to the realised trips during the pandemic, prior to May 2021. As it has been determined that a high percentage of consumers from Serbia belonging to both generations travel and plan to travel within Serbia and abroad, it cannot be said that a significant negative motivation to travel during the pandemic could be observed in the respondents' responses.

Travellers more often opted for domestic tourism during the pandemic (Abdelkawi & Giorgini, 2021; Lazarević & Veljković, 2021), and 31% of the respondents from Serbia plan to permanently replace international plans with local ones (EY, 2021). When the behaviours of Generation Y and Generation Z are taken into consideration and compared with older generations, it can be concluded that Generation Z and Y are more likely to risk. Additionally, although they displayed fear of the virus, Millennials and Generation Z are more willing to travel, primarily in their country (DCI, 2020). Drawing a parallel with the results of this empirical research, it can be stated that the respondents in Serbia felt fear of travelling to another country during the pandemic – 32% of the respondents belonging to Generations Z and Y said that they are afraid to go abroad. This fear negatively, but very moderately, affects plans to vacation abroad. In relation to their plans of travelling, members of these generations from Serbia are more willing to travel abroad (74%) than they are to travel within Serbia (64%) in the near future.

CONCLUSION

The tourism and hospitality industry has suffered grave losses due to the pandemic. Tourism receipts worldwide are not expected to return to their 2019 levels until 2023 (Behsudi, 2020), and McKinsey (2020) predicts that international air traffic will not return to its 2019 levels before 2024. The tourism industry has to adapt to the new reality produced by the pandemic. This also means that, during the COVID-19 pandemic, the industry has to adapt to the altered consumer behaviour in travel planning.

During the pandemic, prior to May 2021 (when this research was conducted), 25% of Generation Z and Generation Y travelled outside Serbia, 56% travelled within Serbia, and 19% did not travel anywhere. During that period, the highest percentage of respondents with above average income (64%) travelled abroad, and the highest percentage of respondents with average income (65%) travelled within Serbia.

More Millennials prefer to plan trips in advance compared to members of Generation Z – 77% of Generation Y and 63% of Generation Z like to plan their trips in advance. The results of this research prove that a considerable percentage of these generations travelled during the pandemic, and that they plan to travel both within Serbia and abroad. A larger percentage of Generation Y and Generation Z plan to vacation abroad (74%) compared to the percentage planning to vacation in Serbia (64%). The percentage of consumers who plan to vacation abroad has tripled in comparison with the trips made during the pandemic, prior to May 2021 (from 25% to 74%). The percentage of consumers who plan to vacation in Serbia marked an 8% increase in comparison with the realised trips prior to May 2021.

Previous research shows that consumers around the world, including the members of Generation Y and Generation Z, preferred domestic travel during the pandemic. The results of this empirical research prove that a high percentage of the members of these generations plan to vacation abroad in the near future, even though they had travelled around Serbia to a greater extent during the pandemic.

Fear exerts a certain influence on plans to travel abroad during the pandemic (32% of the respondents stated that they are afraid to travel abroad). A high percentage of respondents with below average income (38%) feel afraid to travel abroad, unlike the respondents with above average income (14%).

Based on these conclusions, Serbian organisations within the tourism and hospitality industry are recommended to focus on members of Generations Z and Y, so as to ‘animate’ them to ‘invest’ their money into travelling around Serbia. As many as 69% of respondents expressed care for Serbia’s economy (EY, 2021), and the aforementioned recommendation can be easily implemented. Also, organisations and facilities within the tourism and hospitality industry are expected to improve their sustainability. As the crisis caused by the COVID-19 pandemic accelerated the processes of innovation and digital transformation (Mamula Nikolić, Perčić & Nećak, 2022), offering online services, based on a good plan and a sound digital marketing strategy, would be one of the optimal solutions.

The limitation of this paper lies in the fact that the paper considers only one factor which affects travel planning and organising in Serbia during the pandemic, and that is the fear of travelling to another country. Therefore, future research on this topic could consider more factors, only some of which are loss of work due to the pandemic, fear of losing one’s job, reduced income, and tendency towards saving due to the uncertainty of the future.

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ПОНАШАЊЕ ПОТРОШАЧА У ТУРИЗМУ ТОКОМ COVID-19 ПАНДЕМИЈЕ

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Резиме

Предмет рада је понашање потрошача приликом планирања путовања током COVID-19 пандемије. Циљ рада је да се разуме понашање путника током пандемије. Рад се теоријски ослања на резултате досадашњих истраживања о утицају здравствених криза на туризам и понашање потрошача. У емпиријском истраживању је испитана генерација Y (миленијалци) и генерација Z. Прецизније, рад испитује њихове намере у планирању путовања на одмор током пандемије, као и колико страх утиче на планирање путовања ван Србије. Емпиријско истраживање, спроведено у Републици Србији маја 2021. године, доказује да је прили-

чан проценат генерација Y и Z путовао током пандемије, све до маја 2021. године (25% у иностранство, 56% по Србији), и да обе генерације у блиској будућности планирају путовања у иностранство (74%) у већој мери него што је то случај са путовањима унутар Србије (64%). Процент потрошача који у блиској будућности планира одмор у иностранству утврдио се у односу на путовања током пандемије, реализована пре маја 2021. године (са 25% на 74%), а проценат потрошача који планирају одмор у Србији повећан је за 8% у односу на реализована путовања у истом периоду. Досадашња истраживања показују да се потрошачи широм света, укључујући припаднике генерација Y и Z, током пандемије радије опредељују за путовања у земљи. Ово емпијско истраживање показује да су ове генерације током пандемије у већој мери путовале по Србији, али да у блиској будућности већи проценат потрошача планира одмор у иностранству. Страх у одређеној мери утиче на реализацију путовања у иностранство током пандемије – 32% испитаника је изјавило да се плаши путовања ван Србије. Дакле, постоји статистички значајна негативна корелација, умерена по јачини, између две варијабле: страха и путовања у иностранство. Највећи проценат испитаника са исподпросечним примањима (38%) осећа ту врсту страха, за разлику од оних са изнадпросечним примањима (14%). На основу резултата истраживања, не може се рећи да постоји значајна негативна мотивација у односу на путовања током пандемије. Туристичким и угоститељским организацијама у Србији се препоручује да се оријентишу ка генерацијама Z и Y, не би ли се припадници генерација „анимирални“ да „уложе“ свој новац у путовања по Србији. Такође, од туристичких и угоститељских објеката се очекује побољшање активности одрживости.

THE IMPACT OF LEADERSHIP STYLE ON CONTEXTUAL PERFORMANCE: EVIDENCE FROM SERBIA

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Abstract

The primary purpose of this research paper is to present an empirical study framed by the Situational Leadership Theory, also referred to as the Hersey-Blanchard Model, which states that people-oriented leadership behaviours, which include more employee participation, are positively related to contextual performance. The data used in this research was collected through a combination of two quantitative instruments aimed at determining the relative contribution that the independent variables (leadership style) make to the dependent variables (contextual performance). The main method used in this research is hierarchical regression analysis. The research results revealed that people-oriented leadership behaviours with more employee participation (dominant delegating leadership style) have a positive and significant relationship with contextual performance. In terms of practice, this paper may enable organisations to understand the need for an adequate leadership style that ensures greater employee commitment and employee readiness to make additional efforts, which are beyond the job description. In terms of originality and value, along with previous research in this area, this paper enables future research and contributes to a better understanding of the impact of an adequate leadership style, as a predictor variable, on contextual performance, as dependent variable.

Keywords: Situational Leadership Theory, Hersey-Blanchard Model, leadership style, contextual performance

УТИЦАЈ СТИЛА ЛИДЕРСТВА НА КОНТЕКСТУАЛНУ ПЕРФОРМАНСУ У ОРГАНИЗАЦИЈАМА У СРБИЈИ

Апстракт

Примарна сврха овог истраживачког рада је да представи емпиријску анализу у оквиру Ситуационе теорије лидерства, засноване на Херси-Бланшар моделу. Истраживање настоји да укаже на чињеницу да је лидерско понашање оријенти-

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сано на људе, са већом партиципацијом запослених, позитивно повезано са контекстуалном перформансом. Методологија за прикупљање података заснива се на комбинацији два квантитативна инструмента, са циљем да се утврди релативни допринос независне варијабле (стил лидерства) зависној варијабли (контекстуална перформанса). Квантитативна анализа у склопу истраживања извршена је помоћу хијерархијске регресије. Резултати истраживања указују на то да лидерска понашања оријентисана на људе са већим учешћем запослених (доминантни стил лидерства делегирања) имају позитиван и значајан однос са контекстуалном перформансом. У практичном смислу, резултати овог истраживања омогућавају организацијама да схвате потребу за адекватним стилем лидерства који обезбеђује већу посвећеност запослених и њихову спремност на додатне напоре који су ван описа посла. Заједно са досадашњим истраживањима у овој области, овај рад представља полазну тачку будућим истраживањима и доприноси бољем разумевању утицаја адекватног стила лидерства као предикторске варијабле на контекстуалну перформансу, која представља зависне варијабле.

Кључне речи: Теорија ситуационог лидерства, Херси-Бланшардов модел лидерства, стил лидерства, контекстуална перформанса

INTRODUCTION

Leadership style is a highly discussed and studied topic in the field of management due to its influence on the job performance of employees and the competitiveness of the organisation. Systematic research into leadership very often employs a leader-oriented approach and is mostly focused on identifying the specific universal characteristics and behaviour styles which make some leaders more efficient than others (Day, 2014; Lord, Day, Zaccaro, Avolio, & Eagly, 2017). However, the failure to identify such universal characteristics prompted research to pay more attention to the situation, or the context, in which leaders function. According to Fiddler (1978), leadership does not occur in a vacuum. Better performance requires harmonising leadership style and situational factors. After a significant period of emphasising the importance of the organisational context in the field of management (Johns, 2006), theoretical literature and empirical results reaffirm and highlight the importance of contextual factors and their impact both on leadership and the results of leadership (Ayman & Adams, 2012; Hannah, Uhl-Bien, Avolio & Cavaretta, 2009).

Although situational leadership is currently one of the most popular areas in leadership studies (Dinh et al., 2014; Gardner, Lowe, Moss, Mahoney & Cogliser, 2010), there is a lack of systematic approach to the topic, as well as a lack of agreement on what comprises the leadership context and contextual performances (Ayman & Adams, 2012). Within the contextual approach to leadership studies, authors endeavour to identify the impact of contextual factors on the leadership process, on leaders, followers, and the leader-follower relationship, as well as on leadership results in the form of, among others, efficiency, attitude, behaviour and cognition (Hiller, DeChurch, Murase, & Doty, 2011), where contextual

factors are observed as mediators between the leadership process and its results. When it comes to Serbia, research papers on situational leadership are very limited, while empirical research in this area is very rare. Further theoretical and empirical research in this area is needed in order to increase the competitiveness of Serbian companies by improving their management. The aim of this paper is to examine the influence of leadership style on contextual performance in organisations in Serbia.

The researchers' main assumption is that the leader's style directly influences group performance and goal accomplishment, resulting in specific employee behaviour and performance. Additionally, the researchers assume that the leader's style indirectly influences efficiency through other factors. For example, leadership style can affect the adoption of ICT and, consequently, affect productivity (Čudanov, Todorović & Jaško, 2012). An empirical study was conducted on a sample of 100 respondents from large organisations in Serbia in order to test the validity of this hypothesis.

The paper first gives an overview of the literature concerning the relationship between leadership style and contextual performance. The second part of the paper illustrates the methodology, the sources of data processed by statistical procedures, the selected indicators, and the research variables. The final part of the paper presents the results of the research, discusses them, and draws conclusions and recommendations to managers from them.

THEORETICAL BACKGROUND

Leadership features are among the significant driving forces on which an organisation's performance depends and by which it can be significantly improved (Sorrentino & Field, 2013). Leaders and employees cooperate on a higher motivation level, creating a higher degree of trust, loyalty, and inspiration, which allows performance levels to rise above expectations (Slamet, Toyib, Djumilah & Troena, 2013). Also, leaders can inspire employees to express unconditional loyalty and allegiance to the organisation and its goals (Judge, Bono, Ilies & Gerhardt, 2013). Such a behaviour pattern is related to the employees' willing commitment to additional responsibilities and roles (Gautam, Dick, Wagner, Upadhyay & Davis, 2006; Leković, Amidžić & Ivanović-Djukić, 2022).

Until the 1950s, scientific research in the area of leadership focused on leaders' characteristics and behaviour in order to identify criteria for differentiating between leaders and non-leaders (Day & Antonakis, 2012). Afterwards, this limited view of leadership underwent significant changes with the introduction of the situation-based model of leader efficiency, owing to the identification of the facts that leaders do not exist in a vacuum and that leadership is not an individual phenomenon (Bennis, 2007). According to the situational approach, leadership will have a posi-

tive impact on the achievement of organisational goals only if the leadership style is adapted to the situational context in which the activities are carried out. There is no generally accepted view of what determines the situation context. For this reason, several situational theories of leadership have emerged. One of the best-known approaches to situational leadership was developed by Hersey and Blanchard (1969), based on Reddin (1967) and 3-D management theory (Northouse, 2004; Yukl, 2006; Kaifi, Noor, Nguyen, Aslami, & Khanfar, 2014).

HERSEY - BLANCHARD MODEL OF SITUATIONAL LEADERSHIP THEORY

This model comprises three dimensions: relationship-oriented behaviour, task/job-oriented behaviour, and employee readiness (Blanchard, 2008). Leadership style implies the structure of a person's behaviour that seeks to influence others (Blanchard, 2010). According to this model, leadership styles are classified into four different categories determined by the two basic dimensions of this model: relationship (employee) oriented behaviour and task/job oriented behaviour. The first, *directive leadership style*, is maximally commanded with minimal support - leaders are focused on goal-oriented communication which contains instructions on what and how goals should be achieved by subordinates. Another is the *coaching style*, which shows a high level of focus and a high level of support - leaders are in direct communication with both dimensions, with the aim of achieving goals and meeting the social and emotional needs of employees. In the third, the *supportive style*, the leader is expected to show a high level of support and minimal commanding behaviour - the leader is not exclusively focused on goals and work tasks, but shows maximum support to employees in order to demonstrate the competencies necessary to perform the job. The last, the *delegating style*, is characterised by minimal support to subordinates and minimal commanding behaviour - the leader provides the minimum social support and minimum instructions necessary to perform tasks in order to provide motivation and self-confidence for the independent performance of work tasks. The model emphasises that the appropriate leadership style is determined by the degree of individual readiness, manifested in each given moment in every employee. The level of employee readiness on the continuum line is divided into four categories, as a combination of competence and job dedication: R1 - low competence and dedication; R2 - low competence and high dedication; R3 - high competencies and low dedication; and R4 - high competence and dedication. As employee development from lower to higher levels implies a connection with an appropriate level of leadership, thus forming an optimum combination, leadership efficiency repre-

sents a combination of the maximum readiness level and the appropriate leadership style (Hersey & Blanchard, 1969).

This paper is based on this theory due to the numerous advantages it has. First of all, this theory has passed the market test. The situational theory is well-known and frequently used in the process of leader training in the organisation. For example, it is used as the main tool in training and development programmes in more than 500 companies on the Fortune 500 list (Hersey, Blanchard & Johnson, 2001; Lacey, 2019). The second advantage of the theory is its practicality, reflected in its comprehensibility, intuitive accessibility, and ease of use in various circumstances (Franklin, 2009). The theory's third advantage is the fact that it highlights the leader's flexibility, which implies the need for the leader to identify their employees' needs and apply the appropriate leadership style (Thompson, 2009).

We believe that the application of this theory can have positive results in modern organisations operating in a turbulent environment. In conditions of fierce competition, employees are expected to do more than what is defined by work division and job description, which implies performing activities that do not explicitly correspond to their formal roles and scopes of responsibility (Motowidlo & Harrison, 2014; Viswesvaran & Ones, 2000; Rodić & Marić, 2021). To maximise the overall employee performance, one of the leader's main tasks is to direct employees to behaviour reaching beyond personal interest, or to behaviour which appreciates the interests of the entire organisation. Such a form of employee behaviour, exceeding the behaviour framework related to formal job tasks, is referred to as contextual performance.

CONTEXTUAL PERFORMANCE AS A RESULT OF LEADERSHIP

Contextual performance can be defined as comprising of those elements which support the organisational, social and psychological context directly affecting the completion of tasks and the business success of the organisation as a whole (Werner, 2000). Contextual performance can emphasize different features of the work context, such as the impact on the psychological states of individuals, which can affect the likelihood of other individuals carrying out actions that contribute to organisational effectiveness, or the impact on behaviours that affect an individual's own readiness. Taking on additional responsibility in the form of voluntary help to colleagues with backlogs, allocating additional effort to completing tasks on time, showing attention to colleagues so as to build good relationships, and accepting and assisting new employees represent behaviours characteristic of the employees' contextual performance.

In situation-based approach theories, many contextual performances are analysed. For instance, Borman and Motowidlo (1993) de-

scribe five types of contextual activities: volunteering to carry out task activities that are not formally part of the job; persisting with extra enthusiasm or effort when necessary to complete one's own task activities successfully; helping and cooperating with others; following organisational rules and procedures even when they are personally inconvenient; and endorsing, supporting, and defending organisational objectives (Borman & Motowidlo, 1993). Leadership features are among the significant driving forces on which an organisation's performance depends and by which it can be significantly improved. As the key agents of organisational decisions such as mergers, takeovers, development, resource allocation, and creating and retaining stakeholder values, leadership features are among the significant driving forces on which an organisation's performance depends and by which it can be significantly improved (Avolio, 1999). As for interpersonal relations, leaders and employees cooperate on a higher motivation level, creating a higher degree of trust, loyalty, and inspiration, which leads to performance levels exceeding expectations (Bass, 1985). Research and meta-analyses conducted so far point to a positive correlation between leadership, employee performance, and the organisation's results (Dumdum, Lowe & Avolio, 2002; Kirkpatrick & Locke, 1996). Leadership inspires employees to express unconditional loyalty and allegiance to the organisation and its goals, which is predominantly the result of emotional factors, rather than logic and rationale. Such a behaviour pattern is related to the employees' willing commitment to additional responsibilities and roles (Gautam, Dick, Wagner, Upadhyay & Davis, 2006). An emotional link with the organisation results in pro-social behaviour, including cooperation, help and sharing in relation to all of the organisation's shareholders. In conditions of fierce competition, employees are expected to do more than defined by work division and job description, which implies performing activities that do not explicitly correspond to their formal roles and scopes of responsibility (Borman & Motowidlo, 1993; Motowidlo & Van Scotter, 1994; Van Scotter & Motowidlo, 1996). Such a form of employee behaviour, exceeding the behaviour framework related to formal job tasks is referred to as contextual performance. Taking on additional responsibility in the form of voluntary help to colleagues with backlogs, allocating additional effort to completing tasks on time, showing attention to colleagues so as to build good relationships, and accepting and assisting new employees represent the behaviour characteristic of the employees' contextual performance. The above shows that contextual performance supports the organisational, social, and psychological contexts directly affecting the completion of tasks and the business success of the organisation as a whole. Contrary to task performance, which predominantly manifests on an individual level, contextual performance can be identified with employee behaviour on an organisational level. Another significant difference between these two di-

mensions of performance lies in the fact that contextual performance does not depend on individual professional competencies, but exclusively on individual attitudes and solidarity to others (Borman & Motowidlo, 1993). To maximise the overall employee performance, one of the leader's main tasks is to direct employees to behaviour reaching beyond personal interest, or to behaviour which appreciates the interests of the entire organisation. Research in the area of contextual performance is mostly oriented in the following directions: (a) the importance of the manager's experience in assessing the organisation's members in relation to overall performance, especially in relation to task performance and contextual performance; (b) whether personal characteristics determine contextual performance in relation to task performance; (c) the interdependence of contextual performance and organisational efficiency; and (d) the impact of the organisation's characteristics on contextual performance (Borman, 2004).

Theoretical papers and meta-analyses point out a positive correlation between leadership style, contextual performance, employee performance, and the organisation's results (Dumdum, et al., 2002). Also, empirical research conducted in companies from developed countries shows that leadership style significantly impacts employee's contextual performance (Osabiya, 2015; Yoshioka, 2009; Stojanović & Marić, 2018). On the discrete contextual level, people-oriented leadership styles play an important role in shaping contextual performance and have a high impact on employees' job performance (Osborn, Hunt & Jauch, 2002; Antonakis, 2017). Furthermore, leadership style affects not only performance but also the organisational culture (Savović, Nikolić & Zlatanović, 2021; Janicijević, 2022). We believe that the situation is similar in organisations in Serbia. Accordingly, the following hypotheses were defined:

- H1 – There is a statistically significant impact of leadership style on contextual performance in organisations in Serbia;*
- H2 – Predominantly people-oriented leadership styles (supporting style, delegating style) have a greater impact on contextual performance in organisations in Serbia.*

A significant number of studies have noted the presence of employee orientation towards a certain leadership style, which is positively correlated with direct leadership results and is manifested in employee satisfaction and job performance (Wilkinson & Wagner, 1993). The results of Rise, Setiawan and dan Nimran's (2010) research point towards the fact that employee-oriented leadership styles have a positive and significant effect on the employee. In discussing the results of their research, Roscahyo and Prijati (2013) note that democratic leadership, authoritarian and free control styles both partially and simultaneously have a positive and significant effect on employee performance. Tampi (2014) likewise notes that leadership styles both partially and simultaneously have a positive and significant effect on employee performance.

METHODOLOGY

Sampling Method and Data Collection

Primary research was conducted in order to test the previously mentioned hypotheses. The research was carried out in the period between June and September 2021. The questionnaires were distributed to employees and managers in writing/online form. One part of the questionnaire included questions related to the general information about the respondents: gender, age, years of service, level of education, and position in the organisational structure. The second part of the questionnaire included questions related to contextual performance (Borman & Motowidlo, 1993; Borman, Penner, Allen & Motowidlo, 2001) and leadership style (LEAD-Other instrument Hersey & Blanchard 1969).

Sample Characteristics

The basic set of research, which by its nature has all the characteristics of a closed population due to the defined final number of members in the form of employees/individuals of the largest companies in the Republic of Serbia in 2021, represents the sampling design which takes into account primarily the properties of the base set, while the sample itself has the characteristics of a random sample of the final base set, wherein a sample design with repetition and a known sampling probability is present. A sample of $n = 100$ has the characteristics of a proportional stratified sample, with a size of 0.10, because the list of 100 companies was divided into 10 groups, each consisting of ten companies, so that the respondents of companies of different degrees of success would be evenly represented. The selection of companies in each group was made alphabetically, and the strata within the selected companies was completed by the immediate respondents according to the snowball principle.

Research Variables and Instruments

In order to measure contextual performance, we used 16 items developed to tap the construct described by Borman et al. (1993, 2001). Supervisors rated participants on a five-point scale ranging from 1 = not at all likely to 5 = extremely likely (Motowidlo & Van Scotter, 1994). Contextual performance as a dependent variable was included in analyses as a regression factor score. *Leadership styles*, as an independent variable, was measured according to the Hersey-Blanchard model (LEAD-Other instrument Hersey/Blanchard 1969). Previous research results show that variables such as position, age, gender, level of education and education field have a predictable impact on leadership results, and they are, therefore, included as control variables.

Analyses and Procedures

Correlation methods were applied in order to examine the relationship between leadership styles and contextual performances. Regression methods were applied in order to examine the influence of leadership styles on contextual performances. The data was analysed using the SPSS 21.0 software.

RESULTS AND DISCUSSION

At the beginning of our analysis, we checked the measure of internal consistency. A Cronbach’s Alpha value of 0.85 indicates a very good compatibility of the questions in the questionnaire for a given sample.

Table 1. Reliability statistics

Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
0.853	0.897	20

Source: Authors' Calculation

A correlation analysis was performed to examine the nature and degree of the relationship between the predictor and criterion variables. The results of the correlation analysis and descriptive statistics are shown in Table 2. There is a positive and strong correlation between contextual performances and all leadership styles, at the level of significance of 5% for the Directing, Supporting, and Delegating Leadership Style. The level of significance of the correlation between contextual performance and the Coaching Leadership Style is 10%.

Table 2. Descriptive statistics & correlations

	Mean	Std. Deviation	1	2	3	4	5	6	7	8	9	10
1. Position: Manager/Empl	1.50	0.50	1									
2. Age	39.12	9.78	-0.22**	1								
3. Gender: Male/Female	1.48	0.50	0.017	0.037	1							
4. Education Level	1.92	0.78	-0.53**	0.007	0.005	1						
5. Area of Education:	1.45	0.50	0.084	0.005	0.029	-0.11	1					
6. Directing Leadership	21.63	5.12	-0.349**	-0.04	0.00	-0.34**	-0.04	1				
7. Coaching Leadership	21.43	4.58	-0.420**	-0.09	-0.002	0.41**	-0.05	0.73**	1			
8. Supporting Leadership	20.60	4.24	-0.291**	-0.144*	0.03	0.400*	-0.04	0.66**	0.77**	1		
9. Delegating Leadership	21.43	4.70	-0.339**	-0.02	0.03	0.40**	-0.05	0.73**	0.8**	0.793**	1	
0. Contextual Performance	0.00	1.00	-0.273**	0.021	0.01	0.31**	-0.25	0.53**	0.56*	0.55**	0.58**	1

** Correlation is significant at the 0.01 level (2-tailed).

* Correlation is significant at the 0.05 level (2-tailed).

Source: the authors' calculation

Hierarchical multiple regression was applied in order to examine the influence of leadership style (each of the four leadership styles) on

contextual performances. To establish control over the unexpected impact of independent variables, the variables of position, age, gender, level of education, and education area were introduced. The results are presented in Tables 3 through 6.

Table 3. Hierarchical regression coefficients ^a

Model	Unstandardized Coefficients		Standardized Coefficients	t	Sig.	Correlations			Collinearity Statistics		
	B	Std. Error	Beta			Zero-order	Partial	Part	Toleranc e	VIF	
1	(Constant)	0.359	0.595		.604	.547					
	Position	-0.316	0.161	-0.159	-1.970	0.05	-0.27	-0.137	-0.13	0.66	1.496
	Age	-0.004	0.007	-0.037	-0.535	0.59	0.021	-0.038	-0.03	0.92	1.082
	Gender	0.038	0.131	0.019	0.291	0.77	0.010	0.020	0.01	0.99	1.002
	Education level	0.279	0.101	0.216	2.759	0.00	0.310	0.191	0.18	0.70	1.413
	Education area	-0.219	0.133	-0.109	-1.64	0.10	-0.15	-0.115	-0.10	0.98	1.017
2	(Constant)	-2.045	0.615		-3.325	0.00					
	Position:	-0.040	0.147	-0.020	-0.270	0.78	-0.27	-0.019	-0.01	0.62	1.596
	Age	0.000	0.006	-0.004	-0.067	0.94	0.021	-0.005	-0.00	0.91	1.088
	Gender	0.063	0.116	0.031	0.538	0.59	0.010	0.038	0.03	0.99	1.003
	Education level	0.190	0.090	0.147	2.108	0.03	0.310	0.147	0.12	0.69	1.437
	Education area	-0.198	0.118	-0.099	-1.683	0.09	-0.15	-0.118	-0.09	0.98	1.018
	Directing Style	0.092	0.012	0.476	7.561	0.00	0.53	0.471	0.44	0.85	1.171

a. Dependent variable: **REGR factor score – Contextual Performance**

Source: the authors' calculation

Before analysing the results of the set model (Tables 3 through 6) of multiple regression, we want to point out the fulfilment of the assumption of multicollinearity. In addition to the correlation coefficients, the values of Tolerance and VIF indicate the existence of multicollinearity. Having in mind the limit values of these indicators (Tolerance <0.10; VIF >10), we can say that the values are the indicator of all variables in the domain of limit values.

Table 3a. Model summary ^c

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate	Change Statistics				
					R Square Change	F Change	df1	df2	Sig. F Change
1	0.354 ^a	0.12	0.104	0.94657	0.126	5.80	5	202	0.000
2	0.565 ^b	0.31	0.299	0.83729	0.194	57.16	1	201	0.000

a. Predictors: (Constant). Education area: social/technical; Age; Gender: male/female; Education: elementary/BSc/MSc/PhD; Position: manager/employee

b. Predictors: (Constant). Education area: social/technical; Age; Gender: male/female; Education: elementary/BSc/MSc/PhD; Position: manager/employee; Directing Leadership Style

c. Dependent variable: **REGR factor score – Contextual Performance**

Source: the authors' calculation

Table 3 shows a positive and significant impact (5%) of the Directing Leadership Style on contextual performance. Table 3a represents the model summary and shows result that evaluate the whole model using the coefficient of determination, r^2 . The coefficient of determination is 0.12. This value

means that the model explains 12.60% of the variance of the dependent variable (Contextual Performance).

Table 4. Coefficients ^a

Model	Unstandardized Coefficients		Standardized Coefficients	t	Sig.	Correlations			Colinearity Statistics	
	B	Std. Error	Beta			Zero-order	Partial	Part	Tolerance	VIF
(Constant)	0.359	0.595		.604	0.547					
Position	-0.316	0.161	-0.159	-1.970	0.050	-0.273	-0.137	-0.130	0.668	1.496
Age	-0.004	0.007	-0.037	-0.535	0.593	0.021	-0.038	-0.035	0.924	1.082
Gender	0.03	0.131	0.019	0.291	0.772	0.010	0.020	0.019	0.998	1.002
Education level	0.27	0.101	0.216	2.759	0.006	0.310	0.191	0.182	0.708	1.413
Education area	-0.219	0.133	-0.109	-1.643	0.102	-0.148	-0.115	-0.108	0.983	1.017
(Constant)	-2.728	0.646		-4.224	0.000					
Position	0.05	0.148	0.029	0.389	0.698	-0.273	0.027	0.022	0.602	1.662
Age	0.00	0.006	0.044	0.730	0.466	0.02	0.051	0.042	0.898	1.113
Gender	0.07	0.115	0.039	0.678	0.498	0.01	0.048	0.039	0.996	1.004
Education level	0.13	0.090	0.107	1.541	0.125	0.31	0.108	0.088	0.681	1.468
Education area	-0.247	0.116	-0.123	-2.123	0.035	-0.148	-0.148	-0.122	0.982	1.018
Coaching Leadership Style	0.11	0.014	0.527	8.030	0.000	0.55	0.493	0.461	0.763	1.310

a. Dependent Variable: REGR factor score - Contextual Performance

Source: the authors' calculation

Table 4 shows a positive and significant impact (5%) of the Coaching Leadership Style on contextual performance. Table 4a presents the model summary using the coefficient of determination ($r^2 = 0.338$). The model explains 33.8% of the variance in Contextual Performance. The subsequently included independent variable explained the additional 21.2% of the variance of Contextual Performance (r^2 changed by 0.212, F changed by $(1.201) = 64.488$, $p < 0.05$).

Table 4a. Model summary ^c

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate	Change Statistics				
					R Square Change	F Change	df1	df2	Sig. F Change
1	0.354 ^a	0.13	0.104	0.94657	0.126	5.80	5	202	0.000
2	0.581 ^b	0.34	0.318	0.82567	0.212	64.488	1	201	0.000

a. Predictors: (Constant), Education area: social/technical; Age; Gender: male/female; Education: elementary/BSc/MSc/PhD; Position: manager/employee

b. Predictors: (Constant), Education area: social/technical; Age; Gender: male/female; Education: elementary/BSc/MSc/PhD; Position: manager/employee, Coaching Leadership Style

c. Dependent Variable: REGR factor score - Contextual Performance

Source: authors' calculation

Table 5 shows a positive and significant impact (5%) of the Supporting Leadership Style on contextual performance.

Table 5. Coefficients ^a

Model	Unstandardize		Standardized	t	Sig.	Correlations			Colinearity	
	d Coefficients	Coefficients	Coefficients			Zero-	Partia	Part	Toleranc	VIF
	B	Std. Error	Beta			order	l		e	
(Constant)	0.35	0.595		0.60	0.54					
Position	-0.316	0.161	-0.159	-1.97	0.05	-0.273	-0.13	-0.13	0.668	1.496
Age	-0.004	0.007	-0.037	-0.53	0.59	0.02	-0.03	-0.03	0.924	1.082
Gender	0.03	0.131	0.019	0.29	0.77	0.01	0.02	0.01	0.998	1.002
Education level	0.27	0.101	0.216	2.75	0.00	0.31	0.19	0.18	0.708	1.413
Education area	-0.219	0.133	-0.109	-1.64	0.10	-0.148	-0.11	-0.10	0.983	1.017
(Constant)	-2.386	0.622		-3.83	0.00					
Position	-0.118	0.142	-0.059	-0.82	0.40	-0.273	-0.05	-0.04	0.648	1.543
Age	0.00	0.006	0.037	0.61	0.53	0.02	0.04	0.03	0.903	1.108
Gender	0.03	0.115	0.018	0.30	0.75	0.01	0.02	0.01	0.998	1.002
Education level	0.11	0.091	0.087	1.24	0.21	0.31	0.08	0.07	0.671	1.491
Education area	-0.235	0.116	-0.117	-2.02	0.04	-0.148	-0.14	-0.11	0.983	1.018
Supporting Lead. Style	0.12	0.015	0.502	8.01	0.00	0.55	0.49	0.46	0.841	1.189

a. Dependent Variable: REGR factor score - Contextual Performance

Source: the authors' calculation

Table 5a presents the model summary using the coefficient of determination ($r^2 = 0.337$). The summary indicates that the model explains 33.7% of the variance of the dependent variable (Contextual Performance). The subsequently included independent variable explained the additional 21.2% of the variance of Contextual Performance (r^2 changed by 0.211, F changed by $(1.201) = 64.274$, $p < 0.05$).

Table 5a. Model summary ^c

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate	Change Statistics				
					R Square Change	F Change	df1	df2	Sig. F Change
1	0.354 ^a	0.13	0.104	0.94657	0.126	5.80	5	202	0.000
2	0.581 ^b	0.34	0.318	0.82600	0.212	64.274	1	201	0.000

a. Predictors: (Constant). Education area: social/technical; Age; Gender: male/female; Education: elementary/BSc/MSc/PhD; Position: manager/employee

b. Predictors: (Constant). Education area: social/technical; Age; Gender: male/female; Education: elementary/BSc/MSc/PhD; Position: manager/employee; Supporting Leadership Style

c. Dependent Variable: REGR factor score - Contextual Performance

Source: the authors' calculation

Table 6 shows a positive and significant impact (5%) of the Delegating Leadership Style on contextual performance.

Table 6. Coefficients ^a

Model	Unstandardized Coefficients		Standardized Coefficients	t	Sig.	Correlations		Colinearity Statistics			
	B	Std. Error	Beta			Zero-order	Partial	Tolerance	VIF		
1	(Constant)	0.359	0.595		0.60	0.54					
	Position	-0.316	0.161	-0.159	-1.97	0.05	-0.27	-0.13	-0.13	0.668	1.496
	Age	-0.004	0.007	-0.037	-0.53	0.59	0.02	-0.038	-0.03	0.924	1.082
	Gender	0.038	0.131	0.019	0.29	0.77	0.01	0.020	0.01	0.998	1.002
	Education level	0.279	0.101	0.216	2.75	0.00	0.31	0.191	0.18	0.708	1.413
	Education area	-0.219	0.133	-0.109	-1.64	0.10	-0.14	-0.115	-0.01	0.983	1.017
2	(Constant)	-2.117	0.580		-3.64	0.00					
	Position	-0.089	0.139	-0.045	-0.63	0.52	-0.27	-0.045	-0.03	0.645	1.550
	Age	-0.001	0.006	-0.014	-0.24	0.80	0.02	-0.017	-0.01	0.922	1.084
	Gender	0.014	0.112	0.007	0.12	0.89	0.01	0.009	0.00	0.997	1.003
	Education level	0.092	0.089	0.071	1.03	0.30	0.31	0.073	0.05	0.667	1.499
	Education area	-0.231	0.114	-0.115	-2.03	0.00	-0.14	-0.142	-0.11	0.983	1.018
	Delegating Lead. Style	0.116	0.013	0.541	8.77	0.00	0.58	0.526	0.49	0.829	1.206

a. Dependent Variable: REGR factor score - Contextual Performance

Source: the authors' calculation

Table 6a presents the model summary using the coefficient of determination ($r^2 = 0.368$). This model explains 36.8% of the variance of the dependent variable (Contextual Performance). The subsequently included independent variable explained the additional 24.2% of the variance of Contextual Performance (r^2 changed by 0.211, F changed by (1.201) = 77.030, $p < 0.05$).

Table 6a. Model summary ^c

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate	Change Statistics				
					R Square Change	F	df1	df2	Sig. F Change
1	0.354 ^a	0.13	0.104	0.94657	0.126	5.80	5	202	0.000
2	0.607 ^b	0.37	0.349	0.80683	0.242	77.030	1	201	0.000

a. Predictors: (Constant). Education area: social/technical; Age; Gender: male/female; Education: elementary/BSc/MSc/PhD; Position: manager/employee

b. Predictors: (Constant). Education area: social/technical; Age; Gender: male/female; Education: elementary/BSc/MSc/PhD; Position: manager/employee; Delegating Leadership Style

c. Dependent Variable: REGR factor score - Contextual Performance

Source: the authors' calculation

Based on the results of hierarchical regression, we can conclude that leadership style determines contextual performance. Thus, hypothesis H1, which states that there is a statistically significant impact of leadership style on the employees' contextual performance as the dependent variable, is confirmed.

After the variables were entered into Step One, the value of the coefficient of determination was $r^2 = 0.126$. The model explains 12.60% of the variance of Contextual Performance. In the second model, concerning the Coaching Leadership Style, the value of the coefficient of determination is $r^2 = 0.338$. Thus, the model explains 33.8% of the variance of the dependent variable (the subsequently included independent variable explained the additional 21.2% of the variance of

Contextual Performance: r^2 changed by 0.212, and F changed by $(1.201) = 64.488$, $p < 0.05$). In the third model, concerning the Supporting Leadership Style, the value of the coefficient of determination is $r^2 = 0.337$, which means that the model explained 33.7% of the variance of the dependent variable (the subsequently included independent variable explained the additional 21.2% of variance of Contextual Performance: r^2 changed by 0.211, and F changed by $(1.201) = 64.274$, $p < 0.05$). In the fourth model, concerning the Delegating Leadership Style, the value of the coefficient of determination is $r^2 = 0.368$. Therefore, the model explains 36.8% of the variance of the dependent variable. We can conclude that people-oriented leadership styles, respectively, have a higher share in the variance of the dependent variable, which is visible from the determination coefficient. The dependent variable and the predictor variables, in comparison with the control variables, showed a statistical significance with a medium loading of correlation in relation to the position/manager variable, and a statistical significance with a positive direction and medium loading in relation to the level of education. These results, which were expected, confirm the role of the control variables.

Analysing each individual model, we can conclude that the highest contribution to the interpretation of the variance of contextual performance is made by the dominantly people-oriented Delegating Leadership Style. In other words, a greater contribution to explaining the dependent variables is made by people-oriented (the Supporting and Delegating) than task-oriented (the Directing and Coaching) leadership styles and behaviour. Task-centred (Coaching and Directing) styles have a minor or negligible impact on contextual performance. Thus, hypothesis H2 is confirmed.

To establish how much each control variable contributes to the final equation, regression coefficients were used in the analysis. The results are shown in Segment 2 of Tables 3 through 6. The Segment contains cumulatively presented results, obtained with all variables entered into the equation. Only one control variable – Education level has a positive and significant impact on contextual performances in all models, while Education area has a significant, but negative impact on contextual performance.

CONCLUSIONS

The purpose of this empirical study was to examine the relationship between leadership style and contextual performance. The research results revealed that relations-oriented leadership behaviours (dominant delegating leadership style) have a positive and significant impact on contextual performance. The analysis clarified and confirmed the basic research assumption, which states that relations-oriented leadership behaviours (supporting and delegating leadership style) have a stronger impact

on contextual performance than task-oriented leadership behaviours (directing and coaching style). The analysed and presented research results have confirmed both hypotheses. First, the results confirmed that leadership style determines contextual performance in the organisations in Serbia. Second, the results confirmed that leadership predominantly oriented towards developing interpersonal relationships with employees has a larger impact on contextual performance in organisations in Serbia.

Thus, in addition to the results and impact process, context becomes one of the three most frequent factors used in defining leadership. Leadership is one of the significant driving forces that an organisation's performance depends on and by which it can be significantly improved. It can be seen from the above that contextual performance supports the organisational, social and psychological contexts directly affecting the performance of assigned tasks and the business success of the organisation as a whole.

PRACTICAL IMPLICATIONS

In terms of practice, the results of this research may enable organisations to understand the need for an adequate leadership style that ensures greater employee commitment and employee readiness for additional efforts that are beyond the job description. This paper provides direct insight into the prevailing leadership style, and the need to develop an adequate leadership style that will play a significant role in the development of a dedicated workforce which will, in turn, contribute to better business results. This paper provides empirical evidence which confirms the influence of leadership style on organisational performance. Together with previous research in this area, this paper can enable future research and contribute to a better understanding of the impact of adequate leadership style, as a predictor variable, on contextual performance as dependent variables.

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УТИЦАЈ СТИЛА ЛИДЕРСТВА НА КОНТЕКСТУАЛНУ ПЕРФОРМАНСУ У ОРГАНИЗАЦИЈАМА У СРБИЈИ

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Резиме

Карактеристике лидерства убрајају се међу значајне покретачке снаге које утичу на перформансу организације. Претходна тврдња се манифестује кроз чињеницу да лидери и запослени сарађују на вишем нивоу мотивације, стварајући већи степен поверења, лојалности и инспирације, што доводи до раста нивоа учинка који превазилази очекивања. Такође, лидери могу инспирисати запослене да искажу безусловну лојалност и оданост организацији и њеним циљевима.

Такав образац понашања повезан је са вољном посвећеношћу запослених додатним одговорностима и улогама.

Студија је обухватила 100 испитаника из највећих компанија у Републици Србији. Подаци за анализу прикупљени су путем упитника који садржи одабране вредности ставова представљене на скали посматраних карактеристика/променљивих, груписаних у оквиру истраживачке целине општег истраживачког подручја. Дизајн узорковања је првенствено узео у обзир својства основног скупа, док узорак има карактеристике случајног узорка коначног основног скупа, гдје је присутан дизајн узорка са понављањем и познатом вјероватноћом узорковања. Примењена је метода хијерархијске регресије како би се испитао утицај стила лидерства на контекстуалну перформансу.

Анализирајући сваки појединачни модел, можемо закључити да највећи допринос тумачењу варијансе контекстуалне перформансе везујемо за стил лидерства који је доминантно оријентисан на људе. Другим речима, већи допринос објашњавању зависних варијабли даје лидерска оријентација ка људима (подржавајући и делегирајући стил) у поређењу са стиловима и понашањем лидера оријентисаним ка задацима (усмеравање и тренирање).

Сврха овог емпиријског истраживања била је да испита однос између стила лидерства и контекстуалне перформансе. Резултати истраживања открили су да понашање лидера усмерено на односе (доминантно делегирајући стил вођења) има позитиван и значајан утицај на контекстуалну перформансу. Овај приступ је дао одговор на основно истраживачко питање, које је у вези са претпоставком да лидерско понашање оријентисано на односе (стил лидерства подршке и делегирања) има снажнији утицај на контекстуалну перформансу од понашања лидера оријентисаног на задатке (стил усмеравања и тренирања). Анализирани и презентовани резултати истраживања потврдили су обе истраживачке претпоставке, а најзначајније претпоставку да стил лидерства одређује контекстуалну перформансу у организацијама у Србији.

DOES OWNERSHIP TYPE MATTER FOR INNOVATIVENESS AND LEARNING ORIENTATION? EMPIRICAL EVIDENCE FROM SERBIA

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Abstract

The turbulent business environment acknowledges innovativeness and learning as the dominant success factors of modern business organisations. The differences in organisations' innovativeness can be explained by the ownership structure, an internal mechanism of corporate governance, especially if significant attention is paid to ownership type. This paper seeks to identify potential differences in innovativeness and learning orientation among companies from the standpoint of domestic and foreign ownership. The research sample consists of 71 companies operating on the territory of the Republic of Serbia. Primary data was collected by the survey method. An appropriate quantitative methodology was implemented in this empirical research, and the data was analysed with the non-parametric Mann-Whitney U test. The results obtained revealed statistically significant differences in the level of innovation and learning orientation between domestic and foreign-owned companies. The originality of the research is reflected in the analysis of innovativeness from the ownership type aspect, including the analysis of product or service innovations, and process and organisational innovations. By studying the link between learning orientation and the type of ownership, this paper fills the research gap identified in the existing literature.

Key words: corporate governance, ownership type, innovativeness, learning orientation

ДА ЛИ ЈЕ ТИП ВЛАСНИШТВА БИТАН ЗА ИНОВАТИВНОСТ И ОРИЈЕНТАЦИЈУ НА УЧЕЊЕ? ЕМПИРИЈСКО ИСТРАЖИВАЊЕ У СРБИЈИ

Апстракт

Турбулентно пословно окружење афирмише иновативност и учење као доминантне факторе успеха савремених пословних организација. Разлике у степе-

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ну њихове иновативности могу се објаснити структуром власништва, интерним механизмом корпоративног управљања, при чему се значајна пажња придаје типу власништва. Овај рад настоји да идентификује потенцијалне разлике у иновативности и оријентацији на учење између предузећа у домаћем и страном власништву. Истраживачки узорак састоји се од 71 предузећа која послују на територији Републике Србије. Примарни подаци прикупљени су методом анкете и анализирани применом непараметарског Mann-Whitney U теста. Добијеним резултатима потврђене су статистички значајне разлике у степену иновативности и оријентацији на учење између предузећа у домаћем и страном власништву. Оригиналност истраживања огледа се у анализи иновативности са аспекта типа власништва, што укључује и анализу иновација производа или услуга, процеса и организације. Спроведено истраживање повезаности оријентације на учење и типа власништва доприноси превазилажењу идентификованог истраживачког гепа у постојећој литератури.

Кључне речи: корпоративно управљање, тип власништва, иновативност, оријентација на учење

INTRODUCTION

Given that the long-term, sustainable success of businesses is largely affected by the degree of their innovativeness, literature on corporate governance can offer explanations for the differences in the degree of innovativeness characteristic of specific businesses. In this regard, numerous previous studies have shown that corporate governance can influence the innovative activities of businesses (Ayyagari et al., 2011; Minetti et al., 2011; Rossi et al., 2015; Gonzales – Bustos & Hernandez – Lara, 2016). It is generally assumed that foreign owners, through intensified monitoring and activism, ‘export’ good corporate governance practices to companies in their group (Aggarwal et al., 2011). The link between ownership structure, as an internal mechanism of corporate governance, and innovativeness has been established in studies by Ortega-Argiles et al. (2005), Lee (2012), as well as Ghazi & Rim (2013).

The effects of ownership structure need to be observed, both in relation to the degree of ownership concentration and in relation to the type of ownership (Nikolić & Babić, 2016; Nikolić & Savović, 2018). Although numerous arguments and empirical evidence support the view that foreign ownership makes a company more innovative, in some countries, these companies record a lower level of investment in research and development (R&D) when compared to domestically-owned companies, which can be explained by the policy of many multinational companies that undertake most of their R&D activities in the home country, rather than in the host country (Falk, 2008). The contradictory results of the previous research regarding the impact of foreign and domestic owners on company innovativeness is observed as a research gap, and as such requires

additional research in different economic frameworks. Accordingly, this research aims to fill this gap.

Starting from the fact that knowledge, or knowledge management, is one of the main prerequisites for innovation (Slavković & Babić, 2013; Zlatanović & Mulej, 2015), one of the factors of organisational innovativeness studied in the context of corporate governance is learning orientation. It is considered to be a critical organisational resource for creating a competitive advantage (Simonin & Ozsomer, 2009; Aleksić Mirić, 2017), as well as one of the main prerequisites for innovativeness (Sig-uaw et al., 2006). Learning orientation is also studied as a mediator in relation to the reversible transfer of the knowledge and innovativeness of multinational companies (Jimenez – Jimenez et al., 2014). The aforementioned findings give rise to the question of the connection between learning orientation and the foreign ownership of a company, which is an under-researched area in domestic and foreign literature. As a foreign owner provides advanced knowledge to their affiliates (Chen et al., 2014), it can be assumed that foreign ownership positively influences the development of the affiliates' learning orientation.

Therefore, this paper is focused on companies operating in the Republic of Serbia in order to explore company innovativeness and learning orientation, and the connection of these two notions with domestic and foreign ownership. As actions, innovations imply the practical implementation of ideas resulting in the introduction of new or significantly improved products, services, processes, organisations and marketing methods (OECD, 2005), whereas innovativeness is the characteristic of or capacity for being innovative, i.e. the skill to create new things. Taking into account that innovativeness is by its nature a multidimensional concept which can be measured differently, this paper deals with three types of innovations: product/service innovations, process innovations, and organisational innovations. The research objective is to identify the degree to which the dominant type of ownership explains the differences in learning orientation and innovativeness characteristic of specific companies operating on the territory of the Republic of Serbia. Accordingly, the initial research question is whether foreign owners contribute to the advancement of innovativeness in terms of the analysed forms of innovativeness, as well as in terms of learning orientation. In addition, this paper aims to identify potential differences in the products/services, processes, and organisational innovations of companies.

LITERATURE REVIEW AND HYPOTHESES DEVELOPMENT

Innovation can be seen as a multiphase process through which organisations transform ideas into new/advanced products, services or processes, with the aim of enhancing competitiveness and successful differ-

entiation on the market (Zlatanović et al., 2020). In addition, as different owners may have different motives and may differ in their awareness of innovative activities, ownership structure plays an important role in shaping innovativeness. In line with the resource dependence theory, a foreign company owner is a significant source of resources for the implementation of innovative activities in companies operating in developing countries (Chen et al., 2016, Zhou et al., 2021). As foreign ownership is associated with the direct technological transfer of multinational companies to local branches (Falk, 2008), foreign investors can provide companies with sophisticated managerial knowledge and access to a larger market, which further stimulates innovativeness. Through the assimilation of foreign technology and through access to a wider market, companies taken from foreign firms show a greater propensity to innovate products and processes (Savović et al., 2021). According to Chen et al. (2014), a foreign owner possesses codified technological knowledge, advanced managerial expertise and a global network, which can support the company's innovative activities.

In order to be competitive on the international market, as compared to local firms, foreign firms have a greater need for advanced technological competencies (Chen et al., 2016). For this reason, so as to help intensify the research and development investment efforts of local firms, foreign firms are motivated to provide local businesses with specific technological knowledge and managerial resources (Choi et al., 2011; Chen et al., 2016). The knowledge provided by these firms is a crucial factor in enhancing company innovativeness on emerging markets (Li et al., 2010). At the same time, one of the ways in which foreign ownership positively affects innovativeness is through certain control mechanisms. Specifically, according to Joe, Oh and Yoo (2019), foreign investors act more objectively than domestic owners. Through such monitoring, foreign investors increase transparency and reduce not only the risk of investment in research and development but also the costs of innovative activities. On the other hand, the owner can control company innovativeness through the enhanced monitoring of short-term management aimed at avoiding risks. As a result, they do not invest enough in research and development activities, which can negatively affect the long-term growth of the company (Joe et al., 2019).

Plenty of empirical evidence supports the notion that foreign ownership positively affects innovativeness. One of the first studies in this area was conducted by Love et al. (1996), and it found that foreign ownership increases the likelihood of product innovation. Choi et al. (2012) show that foreign ownership has positive effects on the performance of technological innovation. The results of a study by Joe et al. (2019) indicate that foreign ownership enhances the innovative activities of a company. A study by Choi, Lee, and Williams (2011) reveals a positive link

between foreign ownership and company innovativeness. Gudalupe et al. (2012) come to similar findings, and confirm that companies taken over from foreign owners increase their innovativeness after acquisition. Mustapha and Mendi (2015) find that the foreign affiliates of multinational companies are more likely to innovate products and processes than domestically owned companies. Balsari, Ozkan, and Varan (2015) show that the interaction of foreign ownership and export has a significant positive impact on technological innovation.

The findings discussed above are the basis for the formulation of the following research hypotheses:

- H1a – Foreign-owned companies have a higher degree of product/service innovations compared to domestically-owned enterprises;
- H1b – Foreign-owned enterprises have a higher degree of process innovations compared to domestically-owned enterprises;
- H1c – Foreign-owned companies have a higher degree of organisational innovations compared to domestically-owned companies.

According to the resource dependence theory, learning orientation is one of several major sources of competitive advantage (Liu et al., 2002). It can be defined as a process of information gathering, information sharing, and shared interpretation that improves organisational and individual effectiveness since it has a direct influence on the results (Kaya & Patton, 2011). Three dimensions of learning orientation stand out in literature: commitment to learning, shared vision and openness (Eris & Ozmen, 2012).

As one of the key antecedents of innovativeness (Hult et al., 2004), learning orientation represents a set of organisational values that encourage the members of an organisation to create and share knowledge (Liu et al., 2002; Li et al., 2010). The importance of learning orientation is reflected in the fact that the creation of knowledge is a crucial element of innovativeness (Izadi et al., 2020), which likewise indicates the degree to which these two important concepts are connected. While learning orientation refers to the process of seeking knowledge, innovativeness refers to the exploitation of that knowledge (Li et al., 2010). The positive effect of learning orientation on company innovativeness was proven in a study conducted by Keskin (2006). In addition, learning orientation is indirectly related to both ownership and innovativeness. Specifically, owners can influence company innovativeness through various forms of managerial behaviour, which include learning (Li et al., 2010). Liu, Luo, and Shi (2002) demonstrate that state-owned enterprises with foreign partners are more learning-oriented than state-owned enterprises without foreign partnerships, which clearly reflects the importance of foreign influence for the development of learning orientation. Based on the findings discussed above, the following research hypothesis was formulated:

H2 – Foreign-owned companies show a higher degree of learning orientation compared to domestically-owned enterprises.

Accordingly, we created a research model (Figure 1).

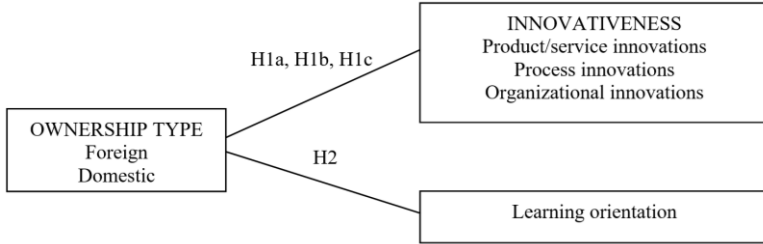


Figure 1. The research model

Source: Authors

METHODOLOGY

Empirical research was conducted using quantitative methodology, based on primary data collected by the survey method. The questionnaire itself is divided into three segments. In order to ensure the high reliability of the measurement scale, each of the analysed variables is measured via a set of items used in previous research, with appropriate adaptations and additions. The first part of the questionnaire contains 14 items, of which 4 measure product innovations (Gunday et al., 2011; Atalay et al., 2013; Rajapathirana & Hui, 2018; Werlang & Rosseto, 2019), 4 refer to process innovations (Gunday et al., 2011; Psomas et al., 2017), and 6 measure organisational innovations (Gunday et al., 2011; Rajapathirana & Hui, 2018). The second part of the questionnaire measures learning orientation using 7 items, conceived on the basis of the research conducted by Li et al. (2010) and Werlang and Rosseto (2019). The respondents expressed their degree of agreement with the formed items using a five-point Likert scale.

The questionnaire was distributed to the employees of 180 companies operating on the territory of the Republic of Serbia, electronically and in person. A total of 71 fully completed and returned copies of the questionnaire formed the research sample. The research sample is defined so as to ensure an approximate representation of domestic and foreign-owned enterprises. The structure of the sample is shown in Table 1.

The majority owner in 49.3% of cases in the sample is a foreign investor, while 38.9% of the sampled companies are owned by a natural person. The remainder of the sample consists of state-owned enterprises (8.5%) and manager-owned enterprises (2.8%). The obtained data was analysed using the techniques of the statistical software package for social sciences SPSS 26.0.

Table 1. The sample structure

Variables		Frequency	Proportion
Business	production	39	54.9
	service	32	45.1
Ownership	domestic	36	50.7
	foreign	35	49.3
Majority ownership type	natural person	28	39.4
	state	6	8.5
	foreign investors	35	49.3
	managerial ownership	2	2.8
Sex	male	39	54.9
	female	32	45.1
Age	under 25	4	5.6
	26 – 35	26	36.6
	36 – 45	28	39.4
	46 – 55	10	14.1
	over 55	3	4.2
Duration of employment at current employer	under 3 years	21	29.6
	3 – 5 years	23	32.4
	over 5 years	27	38
Job position	non-managerial workers	4	5.6
	first-line managers	16	22.5
	middle managers	47	66.2
	top managers	4	5.6
Education	secondary education	8	11.3
	higher education	10	14.1
	BA	31	43.7
	MA	20	28.2
	PhD	2	2.8
Education field	Economy	25	35.2
	Law	3	4.2
	Technical sciences	33	46.5
	Natural sciences	3	4.2
	Other	7	9.9
Previous work experience	yes	57	80.3
	no	14	19.7
Sum		71	100.0

RESULTS AND DISCUSSION

The reliability of the variables was measured based on the value of Cronbach's alpha coefficient. The results of this analysis, for all examined variables, are presented in Table 2. Based on the conducted analysis, the existence of a high internal consistency of findings, and the reliability of the formed variables can be concluded.

After the analysis of the reliability of the measurement scale, a descriptive statistical analysis, the results of which are shown in Table 3, was implemented.

Table 2. Cronbach's alpha coefficient value

Variables	Cronbach's alpha coefficient
Product innovations	0.902
Process innovations	0.884
Organisational innovations	0.939
Learning orientation	0.946

Table 3. Descriptive statistical analysis

	Mean	Standard deviation
Product innovations		
The company is proactive in new product and/or service development.	3.76	1.37
The company introduces new products or services.	3.87	1.36
The company improves existing products and/or services by adding new components.	3.73	1.44
The company develops products and/or services that are unique in the market.	2.96	1.72
Process innovations		
The company introduces numerous changes in business processes.	3.17	1.50
The company introduces innovations in logistics processes.	3.41	1.43
The company increases cost efficiency in logistics processes.	3.14	1.50
The company often introduces the latest technological solutions.	2.76	1.47
Organisational innovations		
The company introduces innovations in the organisational structure.	3.00	1.38
The company applies modern management methods.	3.34	1.51
The company innovates marketing strategies.	3.63	1.36
The company innovates a quality management system.	3.52	1.48
The company innovates the HRM system.	3.32	1.59
The company innovates information systems.	3.45	1.42
Learning orientation		
The company believes that employee learning is an investment, not a cost.	3.63	1.31
Learning is one of the basic values of a company.	3.61	1.43
Learning is seen as a key factor of a company's survival.	3.45	1.38
Managers agree that a company's ability to learn is a key factor for achieving a competitive advantage.	3.52	1.35
Employees agree that the ability to learn is a key factor in the improvement of services and processes.	3.75	1.32
The company has enough resources to implement learning programmes.	3.91	1.34
I have access to the information I need to perform my job in an efficient and effective manner.	3.97	1.24

The Kolmogorov-Smirnov test was used to test the normality of data distribution, since the sample exceeds 50 units. The Mann-Whitney U test from the group of non-parametric statistical techniques is used to examine the differences in innovativeness and learning orientation between domestic and foreign-owned enterprises (Table 4).

Table 4 Differences in innovativeness and learning orientation: domestic versus foreign ownership

Variables	Ownership type	N	Mean Rank	Mann – Whitney U	Sig.
Product innovations	domestic	36	28.36	355.000	0.001
	foreign	35	43.86		
Process innovations	domestic	36	29.31	389.000	0.005
	foreign	35	42.89		
Organisational innovations	domestic	36	26.01	270.500	0.000
	foreign	35	46.27		
Learning orientation	domestic	36	30.26	423.500	0.017
	foreign	35	41.90		

There are statistically significant differences between domestic and foreign-owned enterprises in all of the observed dimensions. Foreign-owned companies record a higher degree of product, process and organisational innovations than domestic ones ($p < 0.01$), which confirms hypotheses H1a, H1b and H1c. Such results are consistent with the results of the studies conducted by Love et al. (1996), Choi et al. (2011), Mustafa and Mendi (2015), and Joe et al. (2019). The results are partially consistent with the research results of Choi et al. (2012), Guadalupe et al. (2012), and Balsari et al. (2015), but contrary to the results of the study conducted by Dachs and Ebersberger (2009). The reason behind the higher degree of innovation observed in foreign-owned companies can be the technological transfer of a foreign owner, or the transfer of managerial expertise that expatriates of foreign companies bring to their branch, which can result in a more intensive investment in research and development. In addition, the differences in innovations observed in domestic and foreign-owned enterprises may be a consequence of obtaining the capital needed for research and development activities, which a foreign owner provides to the companies. The synergistic effects of knowledge provided by both foreign company management and domestic management, which has important information about doing business in the local economic context, can result in a greater degree of innovations as compared to companies without foreign support. Significant differences in relation to all three dimensions of company innovations represent the expected result, given their interconnectedness and interdependence. Specifically, the introduction of new products or services requires the innovation of rele-

vant processes. Additionally, in order to innovate processes, a company must also innovate organisational methods and strategies, including the quality management system, information systems, and its human resource management methods. The most pronounced difference between domestic and foreign-owned enterprises refers to product innovations.

The results of the analysis lead us to the conclusion that foreign-owned enterprises are more learning-oriented than domestic-owned enterprises ($p < 0.05$), which confirms hypothesis H2. The obtained results imply the creation of a higher level of knowledge in companies under the control of a foreign owner, which makes them more innovative than companies with domestic ownership. This is consistent with the existing theoretical assumptions. As foreign owners transfer technological and managerial knowledge to their companies, it is expected that foreign ownership develops learning orientation, which results in the creation of additional knowledge, and distinguishes foreign companies from domestic companies.

CONCLUSION

Researching innovation and learning from the view of the ownership type is a significant but underdeveloped research area in the field of corporate governance. While a large number of studies focus on examining the impact of different types of ownership on company performance, the researches related to the connection between foreign ownership and innovations are scarce. At the same time, previous empirical research on this issue has not reached an agreement on the effects of foreign ownership on the innovative activities of business organisations. The conducted study seeks to resolve the contradiction of previous studies and to eliminate the observed gap in literature on corporate governance. The results of the study confirm the existence of statistically significant differences in innovations and learning orientation between domestic and foreign-owned enterprises. Given the multidimensionality of the concept of innovation, this empirical study additionally contributes to identifying differences in product, process and organisational innovations between domestic and foreign-owned enterprises. These results indicate the relevance of foreign ownership for improving innovativeness.

The obtained results have certain theoretical and practical implications. First, the paper systematises the existing knowledge about the connection between foreign and domestic ownership and the innovative behaviour of companies, and discusses why foreign ownership is considered superior in encouraging innovations when compared to domestic ownership. Of special importance is the connection between the type of ownership and the three main forms of innovations, which, according to the best of the authors' knowledge, has not been applied so far. Therefore, the

originality of this paper is reflected in the elucidation of the relationship between foreign ownership and the individual dimensions of company innovation. The conducted study represents a scientific contribution, as it analyses learning orientation as one of the basic assumptions of the innovative activities of business organisations.

The contribution of this paper is also reflected in the identification of the following practical implications for decision makers and policy makers, with a special focus on developing countries. Innovation is the backbone of economic development, and the results of this research recommend encouraging foreign direct investment, and foreign acquisitions of domestic companies. With this in mind, the paper emphasises the need to improve the institutional framework of corporate governance, wherein it is particularly important to improve the regulation of the protection of foreign investors' rights in order to further attract foreign capital.

The conducted study faces certain limitations, which reduce the possibility of generalising the obtained results, and urge caution in the interpretation of the results and the process of determining future research directions. The main limitation of this study is reflected in the small size of the research sample, which is, in turn, a reflection of the closed business culture in the Republic of Serbia and the low interest of its companies in taking part in scientific research. The choice of the national context for the research setting is identified as its additional limitation. Therefore, further research should be conducted in several developing countries. This would provide a basis for comparing the results obtained in different institutional and economic frameworks.

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ДА ЛИ ЈЕ ТИП ВЛАСНИШТВА БИТАН ЗА ИНОВАТИВНОСТ И ОРИЈЕНТАЦИЈУ НА УЧЕЊЕ? ЕМПИРИЈСКО ИСТРАЖИВАЊЕ У СРБИЈИ

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Резиме

Одржив успех предузећа у великој мери је одређен њиховом иновативношћу и оријентацијом на учење. Структура власништва, као интерни механизам корпоративног управљања, сматра се значајном детерминантом иновативности организација, при чему се нарочит значај придаје типу власништва. Иако је однос механизма корпоративног управљања и иновативности предузећа предмет истраживања бројних студија, идентификован је истраживачки геп у проучавању повезаности типа власништва са степеном иновативности и оријентацијом на учење. Такође, студије које су истраживале ефекте типа власништва на степен иновативности предузећа дале су контрадикторне резултате, што указује на потребу за додатним проучавањем ове проблематике у различитим економским и институционалним оквирима. Сматра се да страни власници унапређују иновативне активности предузећа кроз менаџерске ресурсе, трансфер супериорних технолошких знања, релационе ресурсе и интернационалну мрежу пословних партнерских односа. Један од значајних фактора иновативности организација који се изучава у контексту корпоративног управљања јесте и оријентација на учење. Имајући у виду знање као основни аутпут, оријентација на учење може пружити значајну подршку иновативној пракси предузећа. Док се под оријентацијом на учење подразумева тражење знања, иновативност подразумева његову експлоатацију. Спроведено истраживање настоји да превазиђе идентификовани истраживачки геп кроз проучавање иновативности и оријентације на учење са аспекта домаћег и страног власништва. Добијени резултати потврђују статистички значајне разлике у степену иновативности и оријентацији на учење између предузећа у домаћем и страном власништву. Потврђене су значајне разлике у степену иновативности мереној кроз иновације производа, процеса и ор-

ганизације. Оригиналноста истраживања огледа се у расветљавању односа типа власништва и одређених врста иновација, као и оријентације на учење која представља једну од важних претпоставки иновативних активности. Допринос рада се огледа у идентификовању следећих практичних импликација за доносиоце одлука и креаторе економских политика, са посебним фокусом на транзиционе економије. Будући да су иновације кључни фактор економског развоја, спроведено истраживање сугерише подстицање иностраних аквизиција домаћих компанија у циљу унапређења степена иновативности и оријентације на учење. Сходно наведеном, у раду је указано на потребу да се унапреди институционални оквир корпоративног управљања, при чему је посебно важно унапредити регулацију заштите права страних инвеститора у циљу даљег привлачења страног капитала.

ENVIRONMENTAL QUALITY AS A DETERMINANT OF THE COMPETITIVENESS AND THE DEVELOPMENT OF ECOTOURISM IN THE REPUBLIC OF SERBIA

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Abstract

Tourism is more dependent on the environment than any other economic activity. Modern tourism requires the use of vast areas of the environment, untouched or well-protected, because only in such areas can it hope to develop so as to be of economic and social benefit. Having in mind the great impact of tourism on the environment, its development needs to harmonise with the concept of sustainability. Ecotourism is one of the selective forms of tourism based on natural resources and their use over time, and it is characterised by tourist offers with unique values. Accordingly, the research subject of this paper is ecotourism, which aims to enable the tourism industry to operate while preserving the environment. The aim of this paper is to analyse the achieved level of environmental quality as the basis for the development of ecotourism, and as a component of the competitiveness of the Republic of Serbia's tourism.

Key words: ecotourism, environment, quality, Travel and Tourism Competitiveness Index, Republic of Serbia

КВАЛИТЕТ ЖИВОТНЕ СРЕДИНЕ КАО ДЕТЕРМИНАНТА КОНКУРЕНТНОСТИ И РАЗВОЈА ЕКОТУРИЗМА РЕПУБЛИКЕ СРБИЈЕ

Апстракт

Туризам, више него било која друга привредна делатност, зависи од животне средине. Савремени туризам захтева значајна просторства нетакнуте или добро заштићене животне средине, јер се само на таквим просторима може плански развијати и доприносити економији и друштву. Имајући у виду колико значајно туризам утиче на животну средину, неопходно је ускладити његов развој са концептом одрживости. Један од селективних облика туризма који се базира на

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природним ресурсима и њиховом искоришћавању током времена је екотуризам, који се одликује туристичким понудама јединствених вредности. Сходно овоме, предмет истраживања овог рада је екотуризам, који тежи очувању животне средине при обављању туристичке делатности. Циљ рада је анализа достигнутог нивоа квалитета животне средине као суштинске основе за развој екотуризма, и као компоненте конкурентности туризма Републике Србије.

Кључне речи: екотуризам, животна средина, квалитет, Индекс конкурентности путовања и туризма, Република Србија

INTRODUCTION

Tourism is one of the world's fastest growing industries, as well as a major source of income for many countries. Other than having the ability to rapidly generate income, tourism also opens up numerous business opportunities that help create new jobs. However, just like other forms of development, tourism can also cause problems, such as social dislocation, loss of cultural heritage, economic dependence on a single industry, and environmental pollution. These facts are sufficient to understand the necessity for 'responsible' tourism (Vu, 2015, p. 2). This sustainable type of tourism, which has a smaller impact on the environment, is called ecotourism.

As a sustainable form of tourism, ecotourism emphasises the equal benefits of tourism development for all the participants in the tourism value chain. Ecotourism is a form of tourism characterised by tourist traffic in protected natural assets, or in areas with preserved natural features and a rich biodiversity, with an extremely low level of construction sites and urbanised areas. In this manner, tourism does not harm the original natural features (Sunlu, 2003, p. 266).

In 1990, The International Ecotourism Society (TIES) perceived ecotourism as a form of tourism involving responsible travel to natural areas, which preserves the environment and reflects the well-being of the local population (TIES, 1990). In line with that, in 1996, the International Union for Conservation of Nature (IUCN) established that ecotourism enables environmentally responsible travel and visits to relatively untouched areas of nature, and promotes ecological conservation with a low visitor impact. Thus, ecotourism facilitates the enjoyment of and respect for nature (and all accompanying cultural facilities, from the past and the present alike), as well as the useful and active socio-economic engagement of the local population (IUCN, 1996).

Ecotourism is a blend of interests emerging from ecological, economic and social issues. It involves a strong commitment to nature and a sense of social responsibility. More precisely, it is about creating and satisfying an individual's need for nature, and about exploiting the potential of tourism for the conservation of nature, development, and the preven-

tion of tourism's negative impact on the environment and cultural heritage (Western, 1993, p.8). Ecotourism is a low-impact natural type of tourism that contributes to maintaining species and habitats, either directly through the contribution to conservation or indirectly by providing income to the local community (Fennell, 2014, p. 45). According to Laskuran, ecotourism implies visiting relatively untouched and unpolluted natural areas in order to admire and enjoy natural landscapes, wild plants and all the accompanying cultural features, from the past and the present, in a certain area (Redžić, 2017, p.106).

The importance of the development of ecotourism can be understood if we bear in mind the main goals it strives for and the contribution it makes by fulfilling them. Therefore, the main goals of ecotourism should be: 1) to attract tourists to natural environments that are unique, but also accessible; 2) to be organised, with the aim of preserving nature through education; 3) to lead to a change in the attitudes of the local population and administration; and 4) to provide employment and business opportunities to the local population (Svržnjak et al., 2014, p.8). Defined in this way, the main goals of ecotourism confirm that it has significant and complex social, economic and environmental implications (Vujović et al., 2012, p.31).

A clear distinction needs to be made between the concept of ecotourism and the category of sustainable tourism. Ecotourism is a modern form of tourism within the tourism system itself, whereas sustainable tourism is the one that strives to reduce tensions and factions within the overall interaction between the tourism industry, tourists, the environment and tourist places, which also includes working for the long-term quality of tourism, and natural and human resources (Đuričić et al., 2009).

The development policy of ecotourism should aim to harmonise highly developed and spatially concentrated tourism which can generate sufficient funds for the conservation and improvement of the environment. Therefore, highly developed countries with strong economies and high standards of living tend to spend more funds on solving environmental problems, due to increasing environmental implications. There are various challenges for the development of ecotourism in terms of sustainability and the involvement of local communities. As far as developing countries are concerned, they are facing significant obstacles and challenges regarding the implementation of ecotourism. Only one of these challenges is the lack of participation of the host community and other interested parties in the development of ecotourism, in spite of the fact that the involvement of the local community in the process of creating and managing protected areas is recognised as an example of good practice. One possible way of overcoming these shortcomings would be the acceptance of institutional arrangements which follow the goals of tourism and the preservation of independent organisations.

Ecotourism has been developing as an alternative to mass tourism, but unlike the latter, it does not require the extensive development of expensive infrastructure. Significantly fewer financial resources and investments are needed for the smooth development of ecotourism, because its advantage is its reliance on the natural beauty of the landscape and a healthy environment, which makes it a suitable form of tourism for less economically developed countries (Snyman, 2017, p.252). In this regard, one of the challenges ecotourism is facing is the disproportion between supply and demand, which manifests itself as the degradation and destruction of basic resources, and the uncontrolled influx of tourists due to a significantly higher demand for ecotourism.

THE FUNCTIONAL CONNECTION BETWEEN ECOTOURISM AND THE ENVIRONMENT

Ecotourism is directly connected with the environment in terms of the conservation and recovery of damaged environment. In comparing the characteristics of ecotourism and the principles of environmental protection, it can be noticed that ecotourism is fully in line with the concept and goals of achieving a high quality environment. Therefore, ecotourism should strive to preserve the natural environment, or the flora, fauna, landscape and cultural heritage of the area (Salman et al., 2021, p.42948).

Both the positive and the negative impacts ecotourism creates with its development in a protected area should be emphasised. The positive impacts can be seen in relation to the three most prominent dimensions of sustainability (economic, environmental and social). The economic benefits of ecotourism are: increased employment opportunities, job creation, the diversification of the regional economy, a contribution to gross domestic product, infrastructure development, and revenue transfer. From the ecological point of view, the proper management and application of ecotourism can affect the environment in the following ways (Kiss, 2016, p.234):

- Ecotourism is a relatively low-polluting economic activity that can improve the preservation and promotion of natural and cultural heritage;
- Ecotourism will encourage responsible tourist behaviour, and the preservation of important wildlife habitats and ecosystems;
- Ecotourism is the best alternative activity to environmentally harmful activities such as agriculture, forestry and mining;
- Ecotourism encourages increased conservation efforts through well-informed tourist guides, who exert their influence on environmentally responsible tourist behaviour;
- Ecotourism demonstrates the importance of natural and cultural resources for the economic and social well-being of the community.

In addition to having economic and environmental benefits, the development of ecotourism can also contribute to the improvement of society's respect for the local community, and provide an opportunity for better understanding and communication among people of different backgrounds. Ecotourism helps the political empowerment of local communities and nurtures the values of different cultures. Consequently, it is considered to be a way of promoting cultural exchange.

Despite its numerous benefits, ecotourism is still an extractive activity that can degrade the environment, rather than protect it as should be the case. Adverse effects can occur even at low levels of use. Some of the negative impacts of ecotourism on the environment are soil erosion, habitat change, air and water pollution, loss of biodiversity, and disturbance of local flora and fauna (Buckley, 2004, p.8). Ecotourism can have negative social impacts on host communities, and its attempts to increase the respect and appreciation for local cultures may produce the opposite effects.

More and more nature reserves, national parks, and natural, cultural and historical monuments are being established in the world. In 1960, about 3% of the Planet's surface was occupied by protected natural areas of various shapes and statuses, with a tendency of further expansion. In 2018, there were more than a hundred thousand protected natural areas that occupied more than 11% of the Planet's land surface, which is about 19 million square kilometres (Jovanović & Živković, 2018, p.212). As the functioning of these territories is connected with a special protection modality, the use of their resource potential is limited to certain forms of activity. Therefore, the problems of developing those forms of activities that will fully use specific production factors in protected areas emerge as ecological factors (Belij & Pavlović, 2018, p.58). Since ecotourism is based on a well-preserved natural environment and the use of resources of protected natural areas, its development path depends on the possibility of using these resources.

In fact, ecotourism has emerged as a bridge between tourism development and environmental protection, and, as such, it represents a small fragment of the tourism industry and a subset of natural tourism, established as tourism which respects the natural environment. At the same time, it is also rational for nature reserves to achieve ecological protection and to make use of their inhabitants. That is exactly why ecotourism is recognised as the best way to help local people and protected areas develop tourism. It is an ideal component of a sustainable development strategy, where natural resources can be used as tourist attractions without harming the protected area (Figure 1).

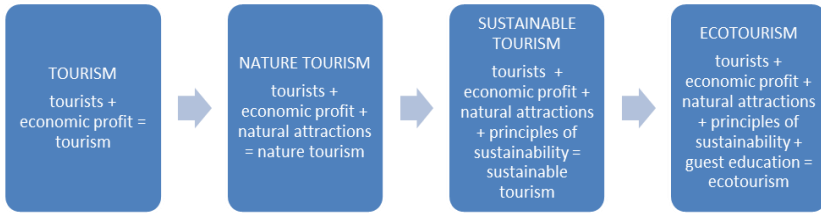


Figure 1. Development and importance of ecotourism

Source: Author's review, according to International Union for Conservation of Nature

The ecotourism market is constantly growing, globally generating a revenue of 77 billion dollars, and accounting for 5 to 7% of the total tourism market. The fact that its growth rate is between 10 and 30% (EB-SCO, 2009) confirms that ecotourism is the fastest growing segment of the tourism market. According to the World Tourism Organization, the growth rate of ecotourism accounts for 6% of the world's gross domestic product, as well as 11.4% of the world's consumption. It is predicted that ecotourism will achieve high growth rates in the next two decades, and that consumption in ecotourism will globally increase at a higher rate than in the rest of the tourism industry. The best example of the accelerated development of ecotourism is Costa Rica, where the number of tourist arrivals in 2007 was recorded to be seven times higher than it was in 1986, and tourism revenues in 2007 were reported to be fourteen times higher than they were in 1986 (Center for Responsible Travel, 2014).

Well-preserved nature is one of the fundamental competitive advantages of the development of tourism in Serbia. The diversity of natural resources is an additional reason to consider the development of ecotourism as an important means of sustainable tourism development, and a consistent and long-term approach to achieving sustainability. At the same time, it is recognised that the profiling of products related to the use of nature and ecotourism are the initiator for achieving a higher level of competitiveness of Serbia as a tourist destination (Ćerović et al., 2015, p.4).

The bases for the development of ecotourism, as a niche market of Serbian tourism, are protected natural areas, classified in seven categories. So far, 471 natural areas have been protected: 5 national parks; 18 nature parks; 21 landscapes of outstanding features and beauty; 70 nature reserves; 6 protected habitats; 315 natural monuments; and 36 natural assets with historical and cultural characteristics. Moreover, a significant number of wild species of plants, animals and fungi were placed under protection, 1784 of them as strictly protected, and 860 of them as protected, on various grounds. (Institute for Nature Conservation of Serbia, 2021).

The development of ecotourism, as it is defined in the international framework, is still in its infancy in Serbia. According to the World Tour-

ism Organization's estimation, ecotourism's global share in total tourist travels is between 2 and 4% (CenORT, 2018). Having in mind the tendencies in our country and the movements on the domestic tourist market, it can be estimated that this share is even smaller in Serbia. The reason behind this is the insufficient motivation of both the potential creators of this tourist product and its intermediaries, travel agencies, to invest in ecotourism, primarily due to low profitability.

METHODOLOGY

The Travel and Tourism Competitiveness Index (TTCI) was developed in 2007 to measure the global competitiveness of the travel and tourism sectors of different countries. The TTCI provides unique data on many qualitative, institutional, business, and environmental issues, as well as data on the individual issues of the travel and tourism sector, and the quality of the natural environment. The Index consists of four subindexes, 14 pillars, and 90 individual components, arranged between different pillars.

The first subindex is *Enabling Environment*, which includes the general conditions necessary for working in the country, and includes 5 pillars: (1) Business environment; (2) Safety and security; (3) Health and hygiene; (4) Human resources and labour market; and (5) ICT Readiness. The next subindex is *Travel and Tourism policy and Enabling Conditions*, which includes policies or strategic aspects that directly affect the tourism and travel industry, namely: (1) Prioritization of Travel & Tourism; (2) International openness; (3) Price competitiveness; and (4) Environmental sustainability. The third subindex is *Infrastructure*, and it monitors the availability and quality of the physical infrastructure of each economy through: (1) Air transport infrastructure; (2) Ground and port infrastructure; and (3) Tourist service infrastructure. The fourth subindex, *Natural and Cultural Resources*, envelops the main reasons for travel and includes: (1) Natural resources; and (2) Cultural resources and business travel (WEF, 2019).

This research uses the data taken from the reports on the Travel and Tourism Competitiveness Index for the years 2007 through 2019, i.e. all the available reports regarding this Index. The number of the countries covered in the reports is different depending on the year in question - 124 countries were covered in the report for 2007, 130 countries in the report for 2008, 133 countries in the report for 2009, 139 countries in the report for 2011, 140 countries in the report for 2013, 141 countries in the report for 2015, 136 countries in the report for 2017, and, finally, 140 countries worldwide were covered in the report for 2019. This analysis covers only the Republic of Serbia, while the report from 2007 addresses Serbia and Montenegro as one country.

The research subject of this paper is ecotourism, which aspires to enable the tourism industry to operate while preserving the environment.

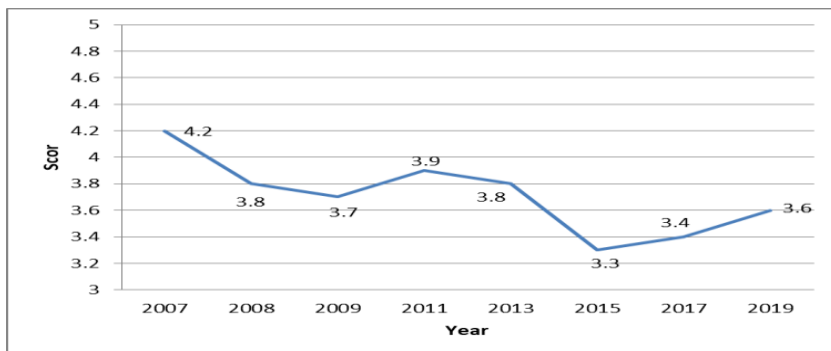
Building upon the set subject of research, the basic goal of the paper is to analyse the interdependence between tourism and the environment over a period of time, and to point out the importance of preserving and improving nature, as a basis for the development of ecotourism. The final goal of the paper is to analyse the achieved level of environmental quality as a component of the competitiveness of tourism in the Republic of Serbia, and as the basis for the development of ecotourism. The research hypotheses are the following:

- The preservation and improvement of the environment are the basis for the development of ecotourism in the Republic of Serbia;
- The level of a destination's tourism competitiveness is conditioned by the mutual influence of tourism and the environment.

RESULTS AND DISCUSSION

In accordance with the research hypotheses, special attention is given to the TTCI pillar *Environmental sustainability*. This pillar consists of components such as the rigour and application of government environmental decrees, as well as of variables for assessing water status, forest resources and the marine world. Considering the fact that tourism impacts the environment, indicators that show the level at which the travel and tourism industry is developing in a sustainable way have been taken into account with this pillar. *Environmental sustainability* should indicate the depletion of the natural environment in the country, and the possibility of adopting and enforcing environmental regulations. Achieving poor results within this category is a clear indicator of excessive depletion of natural resources, which reduces the competitiveness of the tourism sector.

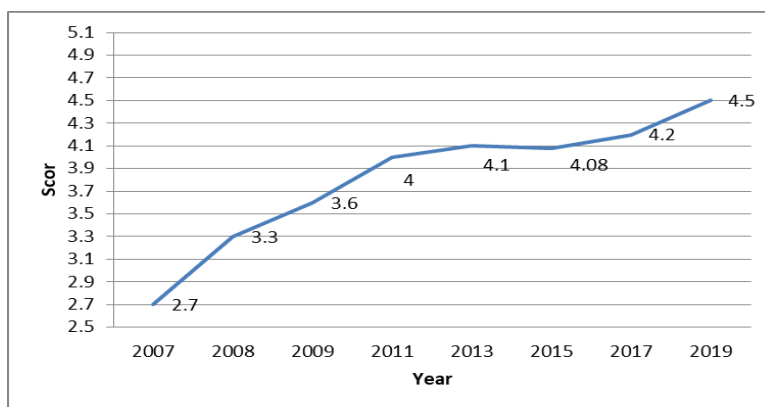
The changes of TTCI throughout the selected time interval are observed through the comparative analysis of values or rank. Comparing the reports for 2007 and 2019, the oscillatory change of values towards decrease can be said to be characteristic. This may be due to the inclusion of an ever increasing number of indicators that are monitored on a year-to-year basis, as these affect the change in the total value of TTCI. Serbia had the lowest TTCI value in 2015, when the Index structure experienced a change with the introduction of a new pillar. Additionally, there were 141 countries included in the analysis of the report for 2015. According to the latest report, from 2019, Serbia took the 83rd place on the ranking list, with a score of 3.6. Compared to the previous report, from 2017, Serbia's rank improved significantly, by as many as 12 places, and the country's overall score improved by 0.2. This was the result of the improvements made in almost all categories which, according to the methodology of the World Economic Forum, determine the level of competitiveness of the tourism sector in any country (Graph 1).



Graph 1. Overview of the achieved level of competitiveness in tourism of the Republic of Serbia according to the TTCI for the period between 2007 and 2019

Source: Author’s review, according to WEF (2007, 2008, 2009, 2011, 2013, 2015, 2017, 2019)

The aggregate indicator (TTCI value) does not always have a great analytical value. Because of that, an in-depth analysis of the *T&T Policy and Enabling Conditions* subindex, which shows specific policies and strategic aspects that have a more direct influence on the travel and tourism industry, is necessary. The value of this pillar during the analysed period ranged from 3.7 to 4.6, with the lowest value recorded in 2015, and the highest in 2011. With the value of 4.3 in 2019, Serbia was ranked 91st, which is a significantly better ranking compared to several previous years.



Graph 2. Environmental sustainability pillar value for Serbia for the period 2007-2019

Source: Author’s review, according to WEF (2007, 2008, 2009, 2011, 2013, 2015, 2017, 2019)

Further analysis will consider the pillar *Environmental sustainability*, which is the research subject of this paper. The scores of the constituent components of the *Environmental sustainability* pillar form the pillar's value. The value of this pillar is characterised by continuous growth throughout the entirety of the observed period – the pillar's value in relation to the Republic of Serbia ranged between 2.7 and 4.5 in the period between 2007 and 2019. At the same time, its ranking improved significantly – it was ranked 120th in 2007, and moved to the 40th place in 2019 (Graph 2). Such a significant improvement in the environmental sustainability in the Republic of Serbia is in line with the first hypothesis of this paper. Therefore, it can be *confirmed that the improvement of the quality of the environment represents a significant potential basis for the development of ecotourism in Serbia.*

Table 1. Components of the pillar Environmental sustainability for Serbia, 2013-2019

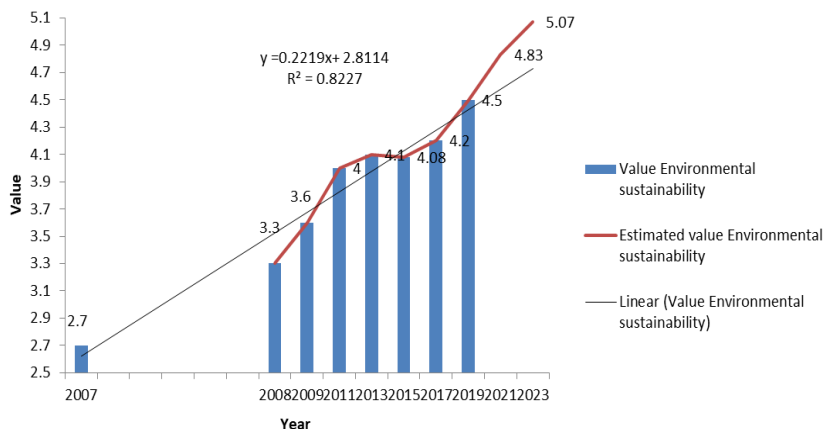
Components of the pillar Environmental sustainability	2013		↑↓	2015		↑↓	2017		↑↓	2019	
	Rank	Scor		Rank	Scor		Rank	Scor		Rank	Scor
Stringency of environmental regulation	97	3,4	↑	99	3,6	↓	101	3,4	↑	105	3,5
Enforcement of environmental regulation	122	2,7	↑	114	3	↓	126	2,9	↑	116	3,1
Sustainability of T&T industry development	114	3,5	↓	121	3,4	↑	111	3,5	↑	94	4
Particulate matter concentration				112	14	↓	103	11,6	↑	97	15,3
Threatened species	53	4	-	50	4	↑	44	4,7	↓	38	4,5
Environmental treaty ratification	84	18	↑	73	19	↑	54	22	↓	78	21
Baseline water stress				36	0,6	↑	46	0,8	-	49	0,8
Forest cover change				9	0,4	↓	17	0	-	18	0
Wastewater treatment				80	8,8	↓	75	6,4	↓	91	2,6
Coastal shelf fishing pressure				66	0,2	-	62	0,2			

Source: Author's review, according to WEF data (2013, 2015, 2017, 2019)

Based on the four-year period shown in Table 1, a constant growth rate of the majority of the components can be noticed through changes in the value of the components of the *Environmental sustainability* pillar. Despite the overall progress of the entire category, individual components in this pillar also point to deterioration. The greatest progress within this pillar was made in the *Sustainability of the Tourism Sector Development* component (17 places up), which assesses the level of development of the environmentally

sustainable tourism sector. The component *Environmental treaty ratification* shows the number of the ratified environmental treaties, and its increase over the years was observed. This indicates that the Republic of Serbia has been increasing the number of signed agreements in the field of environmental protection on a yearly basis, which formally affects the preservation of the environment. Following the component *Threatened species*, a significant improvement is noticed in terms of the reduced number of endangered species, which led to a rank change by as many as 15 places in the period between 2013 and 2019, and a 0.5% increase in value.

The component that measures the percentage of wastewater treatment recorded the value of 2.6% in 2019, compared to the value of 6.4% from the previous report. This means that this component’s rank deteriorated by 18 places. *Baseline water stress* and *Forest cover change* represent components that deteriorated during this period as well. More precisely, there was an increase in water pollution and a decrease in the forest cover, which led to environmental degradation. In the future, particular attention should be paid to these components in order to eliminate this negative trend, because serious problems for the environment can be created in the long run.



Graph 3. Estimated values of the Environmental sustainability pillar for 2021 and 2023

Source: Author’s review, according to WEF (2007, 2008, 2009, 2011, 2013, 2015, 2017, 2019)

Based on the actual values of the *Environmental sustainability* pillar for the Republic of Serbia in the period between 2007 and 2019, a projection of the future value for this pillar can be made for the next two periods, or for the reports for 2021 and 2023. The period between 2007 and 2009 is marked by constant growth, with a miniscule exception in 2015. The projected period is marked by the continuation of the growth trend of

the *Environmental sustainability* pillar's value, which indicates an improvement in the value of all the components included in its structure, and likely implies a better place on the ranking list, which is conditioned by the number of countries covered by the analysis (Graph 3). The increased values of the *Environmental sustainability* pillar in the upcoming period reflect a better and healthier state of the environment in the Republic of Serbia, as well as a reduction in the depletion of natural resources and their preservation for future generations. At the same time, it shows a reduced consumption of the natural environment in the country, and a continued adoption and implementation of environmental regulations. The higher values of the *Environmental sustainability* pillar indicate an increase in the competitiveness of the tourism sector, and opportunities to attract tourists to natural beauties.

Correlation analysis was used as the preferred method to investigate the relationship between the following variables: (1) TTCI and the *T&T Policy and Enabling Conditions* subindex; (2) TTCI and the *Environmental sustainability* pillar; and (3) *T&T Policy and Enabling Conditions* subindex and the *Environmental sustainability* pillar (Table 2).

Table 2. Correlation matrix of TTCI, T&T Policy and Enabling Conditions subindex and the Environmental sustainability pillar in Serbia 2017-2019

		TTCI	T&T Policy and Enabling Conditions	Environmental sustainability
TTCI	Pearson Correlation	1	0.343	0.719
	Sig. (2-tailed)		0.045	0.044
	N	8	7	7
T&T Policy and Enabling Conditions	Pearson Correlation	0.343	1	0.809
	Sig. (2-tailed)	0.045		0.039
	N	7	8	7
Environmental sustainability	Pearson Correlation	0.719	0.809	1
	Sig. (2-tailed)	0.044	0.039	
	N	7	7	8

Source: Author's independent recalculation based on WEF data

The results of the analysis show that:

- The Pearson's coefficient for TTCI and the *T&T Policy and Enabling Conditions* subindex reveals a moderate positive relationship between the two in the analysed time frame, with a statistically significant correlation coefficient of 0.34;
- The direction of the correlation between the overall TTCI and the *Environmental sustainability* pillar is positive, with a strong correlation, indicating that there is a high level of interdependence between the variables. The Pearson's coefficient's value of 0.72 is statistically significant;

- A direct correlation of intensity, with an extremely strong relationship, is present among the analysed variables (*T&T Policy and Enabling Conditions* subindex and the *Environmental sustainability* pillar). The significance of the coefficient and its value of 0.8 are statistically acceptable, which indicates that there is a direct quantitative agreement between the variables.

Upon applying correlation analysis to these variables, regression analysis was applied as well. Regression analysis determines the relationship between the two variables – *Environmental sustainability* pillar, which represents an independent variable, and TTCI, which represents a dependent variable. Based on the regression model, it is possible to notice how much the unit increase in the *Environmental sustainability* pillar value affects the change in the value of the TTCI. With a unit increase in the value of the *Environmental sustainability* pillar, there is a significant increase in the total value of the TTCI by 0.7. The coefficient of determination is higher than 0.5. Therefore, the model is statistically representative and can be used to predict general changes in TTCI values depending on the *Environmental sustainability* pillar. Thus, it can be said that it is possible to predict the value of the dependent variable in relation to the assumed value of the independent variable, and that it is possible to predict the effect of the change of the independent variable in relation to the dependent one.

Table 3. Model elements of a complex regression per years (pillar components influence on its total value) in Serbia 2015-2019.

	2015	2017	2019
	Value of β (Sig.)	Value of β (Sig.)	Value of β (Sig.)
Const	-0.755	-0.19	-1.805
Sustainability of T&T industry development	0.889 (0.002)	0.942 (.000)	0.901 (0.001)
Wastewater treatment	0.874 (.000)	0.895 (0.001)	0.970 (0.001)
Baseline water stress	0.679 (0.001)	0.713 (.000)	0.658 (.000)
Forest cover change	0.664 (.000)	0.699 (.000)	0.741 (0.01)
Threatened species	0.449 (0.001)	0.543 (0.003)	0.498 (0.002)
Particulate matter concentration	0.535 (.000)	0.511 (0.001)	0.540 (0.001)
Stringency of environmental regulation	0.467 (0.001)	0.607 (.000)	0.600 (.000)
Enforcement of environmental regulation	0.382 (.000)	0.273 (.000)	0.567 (0.01)
Environmental treaty ratification	0.549 (.000)	0.434 (0.001)	0.375 (0.001)

Source: Author's independent recalculation based on WEF data

The influence of the value of the pillar's components on its own value was examined by multiple regression analysis. According to the value of the coefficient of determination, the model is deemed statistically

representative. Based on the formed regression model for the Republic of Serbia for the observed period of time, the unit increase of the components *Sustainability of T&T industry development* and *Wastewater treatment* influences the change in the value of the *Environmental sustainability* pillar the most, by as much as 0.9. Components such as *Baseline water stress* and *Forest cover change* lead to a decrease in the value of the *Environmental sustainability* pillar, with growth per unit measuring 0.7 as expected, because greater water pollution and reduction of the forest cover indicate damage to the environment and a change in quality. A slightly smaller decrease in the value of the *Environmental sustainability* pillar is caused by the components *Threatened species* and *Particulate matter concentration*, which cause the pillar's value to decrease by 0.5 with the unit change. With an increase per unit, components related to formal regulations in the environmental field – *Stringency of environmental regulation*, *Enforcement of environmental regulation*, and *Environmental treaty ratification* have the smallest impact on the change in the pillar's value, ranging from 0.27 to 0.6 (Table 3).

Based on the obtained results, the application of quantitative methods over selected variables for the selected time interval *confirms the hypothesis which states that the level of a destination's competitiveness depends on the relationship between tourism and environmental quality*. The attractiveness of a destination and its competitiveness can be increased by the proper management of environmental quality and the optimal use of its natural state. Competitiveness can be improved by applying environmental regulations such as codes of conduct, self-developed environmental practices, certification, and legislation (Blazeska et al., 2015, p.347). Maintaining a high level of overall environmental quality is important for most tourist destinations. In addition to that, natural resources must be maintained and managed appropriately in order to be protected from unnecessary depletion, which would facilitate their sustainability over longer periods of time. It is crucial that future destination development plans be compatible with the integrity of the environment in order for tourism to maintain its economic viability. Sustainable tourism development relies on policies that support harmonious relations between tourists, the local community, and the state government to ensure that such development is in balance with nature.

Future destination management strategies must include environmental protection measures, which will provide lower operating costs, higher revenues and profits, and a healthy environment (Mihalić, 2000). The quality of the environment has become a current issue in tourism due to increasing environmental awareness, tourist demand for better quality, and increased competition among destinations. It is the quality of the environment that has become a factor in emphasising competitiveness over other destinations with different ecological qualities. The consideration of

the overall quality of the environment includes not only the control of the impact of tourism on the environment but also the reduction of all types of environmental problems, as well as investments in environmental protection and the restoration of the degraded environment.

CONCLUSION

The development of ecotourism is essential for preserving and maintaining the balance in the ecosystem, and its sustainable development. Tourism in natural areas, which usually includes some form of the interpretive experience of natural and cultural heritage, supports the preservation of indigenous communities, and is usually organised in smaller groups. The potential of ecotourism, as a segment of the sustainable development strategy, is significant. Therefore, ecotourism should be properly developed in accordance with the principles of sustainability and carrying capacity. It is essential for the development of ecotourism to preserve and continuously improve the quality of the environment.

The analysis of the components of the Travel and Tourism Competitiveness Index led to the conclusion that, in the Republic of Serbia in the period between 2007 and 2019, there was a significant improvement in the competitiveness of tourism according to variables related to the state of the environment. The greatest progress was made within the component *Sustainability of T&T industry development*, which assesses the level of development of the tourism sector which is environmentally sustainable. A significant positive shift in the assessment of the *Environmental treaty ratification* component was observed. This indicates that the Republic of Serbia has increased the number of signed agreements in the field of environmental protection year by year, which formally affects the preservation of the environment. Also, there has been a significant decrease in the number of endangered species. However, components related to water pollution and changes in forest cover have had a negative impact on the competitiveness of the tourism and travel sector in Serbia. These are components that have deteriorated during the previous period. More precisely, there has been an increase in water pollution and a decrease in forest cover, which has led to environmental degradation.

Well-preserved nature represents a significant competitive advantage for the development of tourism in Serbia. Also, preserved and protected natural resources are the basis for the development of ecotourism. It is especially important that the development of ecotourism in Serbia should be not only a means to achieve the overall sustainable development of tourism but also an adequate approach to repositioning Serbia as a tourist destination on the international market.

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КВАЛИТЕТ ЖИВОТНЕ СРЕДИНЕ КАО ДЕТЕРМИНАНТА КОНКУРЕНТНОСТИ И РАЗВОЈА ЕКОТУРИЗМА РЕПУБЛИКЕ СРБИЈЕ

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Резиме

Предмет истраживања у овом раду је екотуризам, као важан сегмент туристичке политике Републике Србије и облик туризма од суштинске важности за очување и одржавање равнотеже у екосистему, и његово одрживо развијање. Основу развоја екотуризма чини квалитетна и зашטיћена животна средина. Квалитет животне средине односи се на квалитет природних карактеристика дестинације, које могу бити погоршане људском активношћу. Природне особине попут живописних пејзажа, природне хидролошке структуре, чисте воде, свежег ваздуха и разноликости биљних и животињских врста могу бити умањене услед деловања загађења, при чему губе на атрактивности. Према туристичкој потражњи, квалитет животне средине је важан за конкурентност већине туристичких дестинација. У том смислу, квалитет природних атракција део је квалитетне понуде дестинације и представља значајну конкурентску предност.

Отуда, за циљ истраживања рада постављени су анализа међузависности туризма и животне средине и указивање на важност очувања природе, која представља основу за развој екотуризма. Будући да добро очувана природа представља једну од фундаменталних конкурентских предности развоја туризма Србије, у раду је анализиран достигнути ниво квалитета животне средине, посматран као компонента конкурентности туризма и основа за развој екотуризма. Стога су анализирани компоненте Индекса конкурентности путовања и туризма (енгл. Travel and Tourism Competitiveness Index), где је посебна пажња стављена на стуб „Еколошка компонента одрживости“ (енгл. Environmental Sustainability).

Добијени резултати показују да је за Републику Србију у периоду између 2007. и 2019. године забележено значајно побољшање ранга, али и вредности стуба „Еколошка компонента одрживости“. Република Србија нашла се на 120. месту 2007. године, уз вредност од 2,7, а 2019. године се померила на 40. место, уз вредности од 4,5. На тај начин је указано да унапређење стања животне средине представља значајан потенцијал за развој екотуризма у Републици Србији у предстојећем периоду. Анализом је утврђено да је највећи помак остварен у оквиру компоненте која оцењује ниво развијености туристичког сектора који је еколошки одржив. Поред тога, уочено је значајано унапређење при оцени компоненте која се односи на усвајање закона и прописа у области животне средине. Ово указује да је Република Србија у претходном периоду повећавала број усвојених закона и прописа из области заштите животне средине, чиме се и на формалан начин утиче на њено очување. Запажено је битно побољшање и у погледу смањеног броја угрожених врста.

Међутим, конкурентности сектора туризма и путовања у Србији негативно доприносе компоненте које се односе на загађење вода и промену шумског покривача. Компоненте „Основно загађење воде“ (енгл. Baseline water stress) и „Промена шумског покривача“ (енгл. Forest cover change) са растом у вредности од 1 доводе до смањења вредности стуба „Еколошка компонента одрживости“ за чак 0,7. Ово указује да је током претходног периода (између 2007. и 2019. године) дошло до повећања загађења вода и смањења шумског покривача. Закључак који произилази из овога је да би у наредном периоду нарочита пажња требало да буде посвећена управо заштити вода и очувању шума, не би ли се унапредила конкурентност сектора туризма и створила основа за развој екотуризма.

THE CONTRIBUTION OF DEVELOPMENT FACTORS TO ECONOMIC GROWTH ON VARIOUS GDP LEVELS – THE MIDDLE-INCOME TRAP

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Abstract

This paper analyses the intensity of the influence of foreign direct investments, exports of goods and services, and research and development expenditure on GDP growth of developed and developing countries. Panel regression analysis determined that the exports of goods and services make the largest contribution to growth on middle levels of income. In fact, the contribution the export of goods and services makes to growth on middle levels of income is two times larger than in countries with a high GDP. The most essential impact on countries with a high GDP level was made by research and development expenditure, which is 3.5 times larger than its impact on the developing Balkan countries. The phenomenon of the Middle-Income Trap can be explained by insufficient research and development expenditure. Foreign direct investments are not statistically significant for the GDP growth of observed countries, but they achieve far better results on low development levels. The empirical data, presented in figures, confirms the conclusions of the econometric analysis.

Key words: middle-income trap, the economic growth factors, exports of goods and services, foreign direct investments inflow, research and development expenditure

ДОПРИНОС ФАКТОРА РАЗВОЈА ПРИВРЕДНОМ РАСТУ НА РАЗЛИЧИТИМ НИВОИМА БДП-А – ЗАМКА СРЕДЊЕ РАЗВИЈЕНОСТИ

Апстракт

Овај рад анализира интензитет утицаја страних директних инвестиција, извоза роба и услуга, и издвајања за истраживање и развој на раст БДП-а високо и средње развијених земаља. Панел регресионом анализом је утврђено да извоз роба и услуга највећи допринос расту даје на средњим нивоима дохотка. Допри-

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нос извоза роба и услуга на средњим нивоима дохотка је два пута већи него код земаља са високим БДП-ом. На високом нивоу БДП-а најзначајнији утицај остварују издвајања за истраживање и развој, и тај утицај је 3,5 пута виши него код средње развијених земаља Балкана. Недовољним издвајањем за истраживање и развој се једним делом може објаснити феномен замке средње развијености. Стране директне инвестиције нису статистички значајне за раст БДП-а посматраних земаља, али далеко боље резултате дају на ниским нивоима развијености. Емпиријски подаци презентовани у графиконима потврђују закључке економетријске анализе.

Кључне речи: замка средње развијености, фактори привредног раста, извоз роба и услуга, прилив страних директних инвестиција, издвајања за истраживања и развој

INTRODUCTION

Growth rates are the result of synergetic effects, that is to say, the effects of a large number of economic growth factors. Their importance and impact change as time goes by, and as GDP changes. On lower GDP levels, when there are not enough investments or capital, foreign investments can be expected to have a deciding impact on development. They appear as an additional source of economic growth financing, they put the available resources into function, they activate the economy, and they increase employment and GDP. Later, they appear as development generators through exports, which increase growth rates and multiply the national income. Nevertheless, it is common for economies to fall into a middle-income trap, and become discouraged by its long duration, which leaves the impression that it is impossible to reach the high-developed economy circle. This article tries to discover the causes of entrenchment into middle GDP levels. At the same time, this article examines the measures which may stop that *circulus vitiosus*, or which may bring the country out of the vicious circle of mediocre economic performances.

The primary goal of this research is to measure the three-factor impact of foreign direct investments (FDI), exports of goods and services (XGS), and research and development expenditure (R&D) in the domain of economic growth on different GDP levels. Using Panel Regression analysis, the impact of these factors is measured within two GDP country groups, for the period between 2001 and 2019. The first group of observed countries (Group A) includes the USA, Canada, Great Britain, France, and China – countries from three different continents and absolute GDP value. The second group (Group B) includes the developing Balkan countries – Romania, Bulgaria, Serbia, Croatia, and North Macedonia.

The World Bank has accepted GDP per capita as a measurement of development level demarcation, which can completely distort the clear image of the Balkan countries. The illusion of growth can be created not only by a GDP increase but also by the decrease of the number of citi-

zens, which is the very case with Balkan countries due to immigration and depopulation. A decrease in the number of citizens can lead to conclusions about positive trends in the macroeconomic variables' movement, since GDP per capita grows at the unchanged GDP value. The impression of this macroeconomic performance's positive movement can appear even in the case of GDP falling when the decrease in the number of citizens is relatively larger. In line with this, and for the sake of comparison, the economic growth factors' influence will be measured as opposed to the movement of the absolute GDP value in the countries of Group B, as well as in the countries of Group A.

A certain amount of aloofness is involved in observing China. According to the World Bank classification, the boundary between the low-developed and developing countries is 1,000 USD GDP per capita, while the boundary between developing and developed countries is 12,000 USD GDP per capita. All the selected countries fulfil this condition of middle, that is to say, high development, except for China. Yet, China is close to this boundary by virtue of possessing a well-expressed growth trend in GDP, as well as in GDP per capita. That is why China is part of Group A – it is the second economy in the world, according to the GDP value measured by current prices.

The main research questions are the following: which factors have the strongest impact on GDP growth of countries in Group A, and which factors have the strongest impact on GDP growth of countries in Group B. The different contributions of select factors to the development of all the selected countries can, at some point, enlighten even the phenomenon of the 'middle-income trap'. In that way, this paper may contribute to widening the scope of research in this field, in terms of the number of factors impacting GDP growth, and in terms of the analysis of each factor's dominant impact on different GDP levels. The practical implications of this research are reflected in the suggestions to economic policy creators, stemming from the identification of the development factors on which development plans should be based according to different GDP levels.

LITERATURE OVERVIEW

For a long time, the relations between development factors and GDP had been examined by various econometric models, and individual and collective economic growth factors' impact on GDP had been measured. Giles and Williams (2000a; 2000b) analysed more than 150 papers, published between 1963 and 1999, which examine the relationship between exports and economic growth. They classified all the papers into three groups: the first group contains those works which rely on the application of range correlation coefficients among the countries; the second group applies cross-sectional regression analysis; and the third group con-

tains works which apply different techniques referring to the analysis of time series on individual countries. Two-thirds of the papers belong to the third group, while more than seventy of them were based on Granger causality and his various tests. After the year 2000, in their examination of this phenomenon, far more authors would use the Panel and Multiple Linear Regression Model, different variants of the VAR model (Vector Autoregression Model), and other econometric models which provide the measurement of the degree of individual development factors' impact on GDP.

Vohra (2001) examined the level of export change impact on the change in GDP value. The analysis was carried out on the example of developing Asian countries such as India, Pakistan, the Philippines, Malaysia, and Thailand, during the period between 1973 and 1993. The results of this empirical research indicate that exports have a positive and significant impact on economic growth, more particularly so in the middle-income group when a country has achieved some level of economic development (Vohra, 2001). A similar analysis was done by Balaguer (2002) who concludes that, among developing countries, those who are export-oriented are the ones with a larger growth rate. That is why, in the case of developing countries, export promotion shows a larger impact on GDP growth in comparison to both low-developed and high-developed countries.

Research results referring to those developing African countries whose GDP per capita is higher than 1,000 USD, which is the lower boundary of middle development according to the World Bank, were similar. Adeleye, Adeteye and Adewuyi (2015) graded Nigerian regression parameters in the period between 1988 and 2012. The conducted analysis showed a positive and statistically significant impact of total export on the economic growth of Nigeria. Other model parameters were not statistically significant. The one-way relation between exports and GDP was proven, in relation to Ghana, by Okyere and Jilu (2020) thanks to the causality test. The same results about the one-way relation of exports' impact on GDP were obtained by Awokuse (2003), Jordaan and Eita (2007), and Travkina (2015). Therefore, exports should be used as a generator of development in the long term (Marjanović and Marjanović, 2019).

The second development factor to be analysed represents foreign direct investments. They are a significant additional source of economic development financing under the insufficient domestic savings conditions (Mencinger, 2003). Under these conditions, foreign direct investments represent the base of accelerated economic development not only through capital inflow but also through technology transfer (Wang & Wong 2009). The positive effects of FDI on development are not the same for all countries (Stevanović, Marković and Lepojević, 2022). Analysing the economy of Pakistan in the period between 1991 and 2005 by applying

correlation analysis and the Multiple Regression Model, Ali and Hussain (2017) proved that there was a positive and statistically significant impact of foreign direct investments on GDP growth. Using regression analysis, the same conclusion was made by Har, Teo & Yee (2008), who examined FDI impact on Malaysian economic growth based on yearly data for the period between 1970 and 2005. Therefore, the foreign direct investments inflow has a positive impact on GDP growth.

Similar research was conducted by Bouchoucha and Ali (2019) on the economy of Tunisia during the period between 1980 and 2015. The authors applied the ARDL Model (Autoregressive Distributed Lag Model) to distinguish the differences between the short and the long run of foreign direct investments' impact on economic growth. The analysis' results showed a positive and statistically significant FDI impact on economic growth both in the short and the long run.

Stanić and Račić (2019) conducted empirical research in Bosnia and Herzegovina for the period between 2005 and 2018. The authors examined FDI impact on economic growth by applying the Multiple Linear Regression Model. In addition to FDI, the following variables were included in the model: imports, exports, growth rate, unemployment, and inflation. The analysis showed that foreign direct investments had a positive impact on BiH's economic growth. The same analysis showed that total imports had the largest impact on BiH's economic growth, while foreign direct investments and total exports took second place. The general conclusion, based on all the aforementioned and other empirical research, is that FDI does have a positive impact on GDP growth, exports, and foreign currency inflow, as well as on the decrease of unemployment, poverty, and inequality (Kastratović, 2016).

Besides export and FDI, the third factor to be included in panel regression analysis is research and development (R&D). The positive impact of this factor is becoming more and more obvious in practice, after the third technological revolution. Indeed, numerous studies prove this. In his analysis, Inekwe (2015) came to very interesting conclusions on R&D impact on GDP in the case of developing countries. A sample of 66 countries was selected, and the countries were classified into those with upper-middle-income and those with lower-middle-income. In the period between 2000 and 2009, the impact of R&D expenditure was statistically significant for the countries with upper-middle-income, while the same cannot be said for the countries with lower-middle-income.

Gumus and Celikay (2015) examined whether R&D impact on economic growth varies depending on the level of a country's economic development. The analysis was conducted on a sample of 52 countries for the period between 1996 and 2010 by applying the Dynamic Panel Data Model. The results obtained by the authors indicate that R&D has a positive and statistically significant impact on the economic growth of devel-

oped countries, both in the long and short run. Nevertheless, in the case of developing countries, there is a positive and statistically significant relation only in the long run. In the short run, R&D impact on the economic growth of the countries in this group is not statistically significant.

The discerned effect of R&D expenditure on economic growth, both in the long and the short run, intrigued even Nair, Pradhan and Arvin (2020), and inspired them to conduct the same study on OECD countries. The analysis was conducted via the VAR model (Panel Vector Autoregressive Model). The authors conclude that, in the long run, there is a positive relationship among R&D, ITC infrastructure, and economic growth, while in the short run, there is a complex relationship among the observed variables which cannot be explained straightforwardly.

The general conclusion drawn from the analysed literature is that there is a positive relationship between the selected development factors (exports, foreign direct investments inflow, and research and development expenditure) on the one side, and GDP on the other side. Nevertheless, the impact intensity of each selected factor varies and it depends on the observed period (a short or a long one), as well as on the achieved level of development. It has to be noticed that, along with GDP growth, the absolute value of R&D expenditure and the relative GDP participation likewise grow, which multiplies this factor's impact on economic development. This paper will try to find the answer to, or offer an explanation for, the middle-income trap by measuring this impact.

PANEL-DATA SAMPLE FORMING

The Panel-data sample is formed based on the annual variable values for the selected countries' group. The countries which are isolated from the target group, including countries with high GDP levels (Group A), are Canada, China, France, the USA, and the UK, while the country group with middle GDP level (Group B) includes Serbia, Croatia, North Macedonia, Bulgaria, and Romania. The collected data covers the time interval of 19 years, that is to say, the period between 2001 and 2019. This time frame is long enough for the relationship among independent and dependent variables to be discerned.

The issue to be examined in this analysis is the GDP movement's dependence on the goods and services export movement, FDI net inflow, and financial division for research and development. The data about the mentioned variables was collected from the World Development Indicators (WDI) section of the World Bank (2021) data basis. The mentioned variables, in WDI, can be found under the titles: "GDP (current US\$) – gross domestic product (GDP)"; "Exports of goods and services (current US\$)"; "Foreign direct investment, net inflow (BoP, current US\$)"; and "Research and development expenditure (% of GDP)". Since there is no

data about R&D for 2019 in relation to any of the countries, the data is supplemented by OECD data (OECD, 2021), a base for Group A countries. In this way, time-series data and cross-section data are completed for this country group, and a balanced data panel is created at the same time.

The analysis of the countries which belong to Group B will be conducted on an unbalanced data panel. Within this panel frame, R&D data is missing for 2019 in relation to all the countries (Serbia, Croatia, North Macedonia, Bulgaria, and Romania). Also, FDI net inflow data for Serbia for the period between 2001 and 2006 is missing because of different calculation systems. The last data change implies the transformation of relative R&D data into absolute values. This transformation also refers to the panel data of high-level GDP countries. The Eviews software package was used for the application of panel regression model analysis.

When observing the absolute GDP values (Figure 1), it can be concluded that there are large value differences between the Group A and Group B countries. Among Group B countries, Romania has the largest GDP value, equalling 249.70¹ billion USD. This value is not even close to the GDP size of Canada, the country with the lowest GDP in Group A whose GDP amounts to 1,741.58 billion USD. The difference is even larger if the comparison is made between USA and China, the countries which have the highest GDP values among Group A countries.

The average GDP growth rate of Group A countries for the observed period amounts to 3.33%, while the average growth rate in Group B for the same period amounts to 4.12%. The higher average GDP growth rate of Group B is the result of the synergetic action of various factors. The most significant of these factors is the larger disengagement of production factors which will, in case they are put into the growth function, bring the economy into the developed group. Besides that, it is a fact that larger growth rates are achieved through a slight increase of absolute GDP value.

¹ All indicator values are either taken from the World Development Indicators section of the World Bank's database or they represent the result of the author's calculation based on data from the same database.

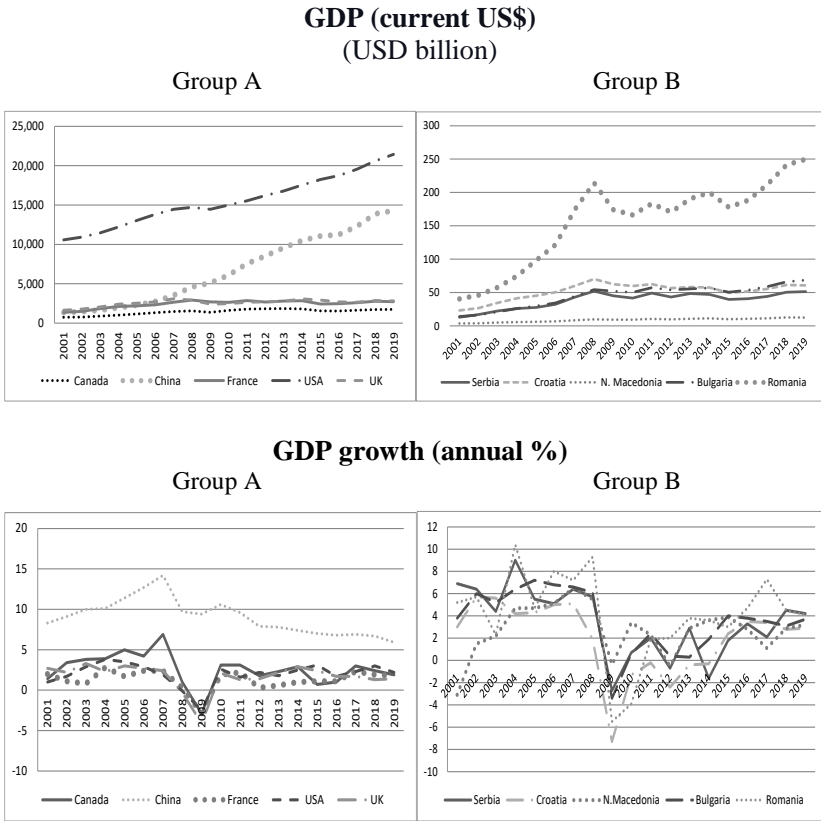


Figure 1. GDP current USD and growth rates of Group A and Group B countries, 2001-2019
Source: World Bank, World Development Indicators, 2021

In the observed period, China has the largest average growth rate among Group A countries, and it amounts to 9.03%. China achieved a growth rate of 14.2% in 2014, which is the largest growth rate among the observed countries. Other developed countries had far lower growth rates in the observed period – Canada’s growth rate averaged at 2.57%, and the USA’s averaged at 2.01%. Among Group B countries, Romania has the largest GDP growth rate, equalling 4.12%, followed by Bulgaria with 3.60%, and Serbia with 3.47%. The presented graphs (Figure 1) point to the fact that Group A countries have by far fewer oscillations in growth rates than Group B countries. Stable average growth rates in the long run are a feature of high development. High growth rates would lead to the economy overheating, which would have multiple consequences on economic courses. China is the exception because of the large capacity of the majority of its resources, especially the workforce, and because of its

decades-long entrenchment into low development. Therefore, it activates all the development engines which result in high growth rates.

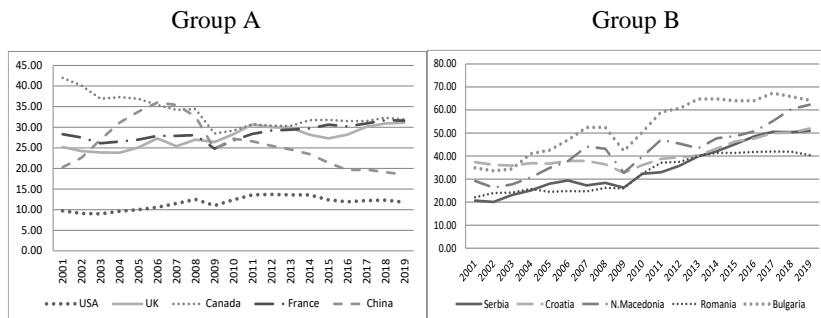


Figure 2. The share of goods and services' exports in the GDP regarding Group A and Group B countries, 2001-2019

Source: World Bank, World Development Indicators, 2021

Group B countries strive to continuously enlarge the exports' participation in GDP in order to reach higher economic growth rates. That is how Serbia increased the exports' participation in GDP from 20.70% (in 2001) to 51.00% (in 2019). The same is true of Romania, which increased the exports' GDP participation rate from 22.10% (in 2001) to 40.40% (in 2019). In the observed period, the analysed Group B countries doubled the exports' participation in GDP. The average exports' GDP participation rate for the observed period amounts to 40.63% in Group B, while the same rate amounts to 25.39% in Group A. The USA's exports' GDP participation amounts to 11.80%, and China's amounts to 18.50%, while Great Britain, Canada, and France had a value of around 31% in 2019 (Figure 2).

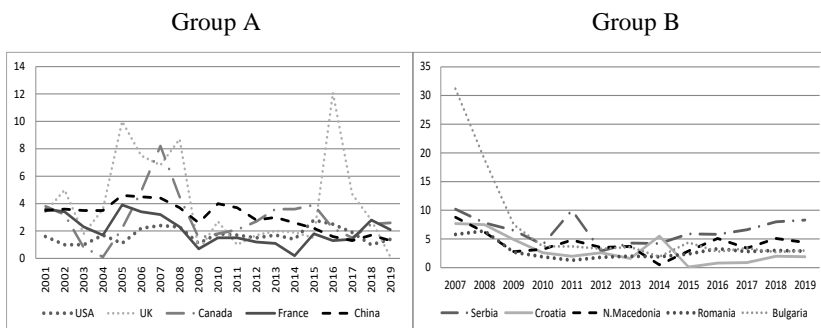


Figure 3. The share of foreign direct investments' inflow in GDP regarding Group A and Group B countries, 2001-2019

Source: World Bank, World Development Indicators, 2021

Foreign direct investments inflows mark a continuous decrease in GDP participation in all the observed countries from Group A and Group B (Figure 3). China decreased FDI participation in GDP from 3.5% (in 2001) to 1.3% (in 2019), while Britain decreased FDI participation from 3.4% (in 2001) to 0.1% (in 2019). Britain and Canada are the only countries that had large oscillations in FDI inflow in the observed period. The average FDI participation rate in GDP regarding Group A amounts to 2.77%. Group B countries mark an average FDI participation in GDP of 5.34% in the observed period. The largest FDI participation decrease in GDP is marked in the example of Bulgaria, from 31.2% in 2007 to 3% in 2019.

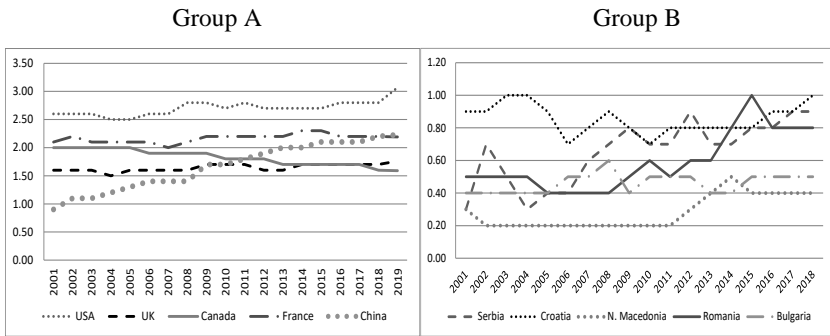


Figure 4. The share of R&D expenditure in GDP regarding Group A and Group B countries, 2001-2019

Source: World Bank, World Development Indicators, 2021

When the potentials of FDI inflows and of exports of goods and services are exhausted, research and development expenditure becomes the key generator of economic growth on higher GDP levels. High GDP level countries allocate far more funds for R&D compared to lower GDP countries, not only in absolute but also in relative indicators (Figure 4). The average R&D expenditure rate in the observed period for Group A countries amounts to 2.0%, while it amounts to 0.57% for Group B countries. The USA allocates the most funds for R&D – 3.07%. In the observed period, China continuously increased its expenditure for R&D. At the beginning of the observed period, in 2001, China allocated 0.90% of its GDP for R&D, and at the end of this period, in 2019, this expenditure reached the value of 2.23%. France has approximately the same R&D expenditure – 2.19% (in 2019). Group B countries’ expenditures are far more frugal. Croatia had the highest R&D expenditure rate – 1% in 2019, followed by Serbia with an expenditure rate of 0.90%, Romania with 0.80%, Bulgaria with 0.50%, and North Macedonia with 0.40%. Therefore, relative R&D expenditures are directly proportional to the absolute GDP value.

RESEARCH METHODOLOGY

In this research, GDP value represents the function of goods and services exports' value, FDI net inflow, and R&D. The relation between the dependent and independent variables defined in this way can be mathematically illustrated as follows:

$$GDP = f(XGS, FDI, R \& D) \quad (1)$$

Here, GDP stands for gross domestic product; XGS stands for exports of goods and services; FDI stands for foreign direct investments inflow; and R&D stands for research and development expenditure.

The econometrical form of equation 1 can be written down as:

$$GDP_{it} = \beta_0 + \beta_1 \ln XGS_{it} + \beta_2 \ln FDI_{it} + \beta_3 \ln R \& D_{it} + \varepsilon_{it} \quad (2)$$

where β_0 stands for a constant; β_1 , β_2 , and β_3 stand for coefficients of independent variables; and ε_{it} stands for the error term. Other designations have the same meaning as in equation 1. Equation 2 was originally used in the analysis of the raw data. However, the obtained results were not sustainable. Thus, it was found that FDI has a negative effect on the GDP of the countries of group B. The existing problem was solved by logarithmising the data as Gujarati and Porter (2009) recommend. The logarithmic econometric equation has the following form:

$$\ln GDP_{it} = \beta_0 + \beta_1 \ln XGS_{it} + \beta_2 \ln FDI_{it} + \beta_3 \ln R \& D_{it} + \varepsilon_{it} \quad (3)$$

Equation 3 represents a basic panel regression equation which will be evaluated by the application of the Pooled OLS model, and the application of Fixed-Effect model and Random-Effect model.

RESULTS AND DISCUSSION

Research results will be shown first for Group A, and then for the countries from group B. Before the application of the Panel Regression model, it is necessary to examine the stationarity of the time series data in the panel.

The stationarity evaluation for the first country group (Group A) is done by the application of the unit root test. The unit root test was conducted by the use of: Levin, Lin, and Chu statistics; Breitung t-statistics; Im, Pesarran, and Shin W-statistics; and the ADF-Fisher Chi-square and PP-Fisher Chi-square method. The application of the aforementioned methods showed that the observed variables (GDP, XGS, FDI, and R&D) are not stationary on level, yet they reach stationarity on the first difference. Starting with these results, the logarithmised data was transformed on the first difference in the next step.

The evaluation of the regression equation was carried out by the application of the Pooled OLS model, Fixed Effect model, and Random Effect model. The selection of a model that illustrates the relationship between the dependent and independent variables best is done by the Chow test, Hausman test, and Lagrange Multiplier test (Zulfikar, 2018).

Table 1. Results of the Chow test, Hausman Test and Lagrange Multiplier Test for Group A countries

Chow Test			
Effects Test	Statistic	d. f.	Prob.
Cross- section F	1.917076	(4.82)	0.1153
Cross- Section Chi- square	8.045831	4	0.0899
Lagrange Multiplier Tests for Random Effects			
	Test Hypothesis		
	Cross-section	Time	Both
Breusch-Pagan	0.293124 (0.5882)	0.4567 (0.4992)	0.749823 (0.3865)
Hausman Test			
Test Summary	Shi-Sq. Statistic	Chi-Sq. d. f.	Prob.
Cross- section random	7.571602	3	0.0557

Source: Authors' calculations

The Chow test provides the basis for the selection between the Pooled OLS model and the Fixed Effect model. The null hypothesis of the Chow test implies that the Pooled OLS model represents the relationships among the observed variables better. As the value of Cross-Section Chi-square probability (0.0899), shown in Table 1, is bigger than 0.05, the null hypothesis can be accepted. The result of the Lagrange Multiplier Test shows that the null hypothesis is accepted. In other words, what is accepted is the Pooled OLS model, as opposed to the Random Effect model. Therefore, it can be concluded that the regressors are evaluated best by the application of the Pooled OLS model. The results of the applied Pooled OLS model will be presented next (Table 2).

The results of the Pooled OLS model for group A indicate that the observed independent variables (XGS, FDI, R&D) have a positive impact on the movement of GDP value. R&D, with a coefficient of 0.60, has the greatest impact. Therefore, a 1% growth of R&D leads to a 0.60% growth of GDP. R&D is followed by the impact of goods and services exports, with the coefficient of 0.26. Exports of goods and services and R&D have a statistically significant impact on GDP movement within group A countries. FDI net inflow is not statistically significant in the observed model. The regressor of FDI net inflow is 0.003 in total.

Table 2. Results of the Pooled OLS model of Group A

Dependent Variable:D(lnGDP)				
Method: Panel Least Squares				
Variable	Coefficient	Str. Error	t- Statistic	Prob.
C	0.003394	0.004133	0.821184	0.4138
D(lnXGS)	0.256344	0.043556	5.885378	0.0000
D(lnFDI)	0.003023	0.004158	0.726995	0.4692
D(lnR&D)	0.569029	0.048046	11.843500	0.0000
R- squared				0.858032
Adjusted R- squared				0.853079
F- statistic				173.256400
Prob(F- statistic)				0.000000

Source: Authors' calculations

The Adjusted R² shows us that the model can reliably explain the variations in GDP movement in relation to goods and services exports' movement, FDI net inflow, and R&D. The independent variables explain up to 85.31% of variations in GDP movement. The F-statistics probability value of 0.0000 (less than 0.5) only confirms the previous statement. Therefore, the regression equation which illustrates the relationship between the dependent and independent variables best can be represented in its econometric form:

$$\ln GDP_{it} = 0.003 + 0.26 \ln XGS_{it} + 0.003 \ln FDI_{it} + 0.60 \ln R \& D_{it} \quad (4)$$

After determining the econometric form of the regression equation, the model was tested for multicollinearity and heteroscedasticity. The multicollinearity problem is examined by the application of the variance inflation factor (VIF).

Table 3. The Variance Inflation Factor of Group A

Variable	Coefficient Variance	Uncentered VIF	Centered VIF
C	0.000017	1.531160	NA
XGS	0.001897	2.592271	2.001395
FDI	0.000017	1.098418	1.098338
R&D	0.002308	2.831277	1.869259

Source: Authors' calculations

Since the Centered VIF value is lower than 10 (Table 3) for all the independent variables, it can be concluded that the observed model does not have the expressed multicollinearity problem. The observed Centered VIF values of the observed independent variables amount to 2.00 in the case of exports of goods and services, 1.10 for FDI net inflow, and 1.87 for R&D.

The examination of the existence of heteroscedasticity is conducted by the application of the LR Test (the Likelihood Ratio Test). The obtained results are shown in the following table (Table 4).

Table 4. Panel Cross-section Heteroscedasticity LR Test of Group A countries

Likelihood ratio	Value	df	Probability
	8.412123	5	0.1349

Source: Authors' calculations

The null hypothesis of the LR test implies that the residuals in the evaluated model are homoscedastic. In other words, the model does not have a problem with heteroscedasticity. Since the p-values are 0.13 (larger than 0.05), it can be stated that the alternative is rejected, that is to say, the null hypothesis is accepted (Table 4). This is evidence that the model does not have a problem with heteroscedasticity.

The same procedure of regression coefficients analysis was implemented on the sample of Group B countries. The first step was, even in this case, the determination of the panel time dimension by the application of the unit root test. The implementation of the unit root test showed that gross domestic product, exports of goods and services, foreign direct investments inflow, and research and development expenditure reach stationarity on the first difference. The stationarity evaluation was performed by the same methods applied in Group A. Based on the obtained results, the first difference of the observed variables' logarithmised values was calculated. This difference served as the basis for the implementation of regression analysis.

The evaluation of Group B regressors was done by the application of the Pooled OLS model, Fixed Effect model, and Random Effect model. The selection of an adequate model was done based on the results of the Chow Test, the Hausman Test, and the Lagrange Multiplier Test.

Table 5. Results of the Chow test, Hausman Test and Lagrange Multiplier Test for Group B countries

Chow Test			
Effects Test	Statistic	d. f.	Prob.
Cross- section F	0.868431	(4.71)	0.4873
Cross- Section Chi- square	3.773552	4	0.4375
Lagrange Multiplier Tests for Random Effects			
	Test Hypothesis		
	Cross-section	Time	Both
Breusch-Pagan	0.463651 (0.4959)	42.26809 0.0000	42.73175 0.0000
Hausman Test			
Test Summary	Shi-Sq. Statistic	Chi-Sq. d. f.	Prob.
Cross- section random	0.959678	3	0.8183

Source: Authors' calculations

The null hypothesis directs the Chow Test towards the selection of the OLS model, while the acceptance of the alternative hypothesis implies the selection of the Fixed Effect model. Since the probability value of Cross-Section Chi-square is 0.4375 (larger than 0.05 – Table 5), the null hypothesis is accepted. In other words, the OLS model is accepted. The selection between the Pooled OLS model and the Random Effect model was done based on the Lagrange Multiplier Test. The Cross-section probability value of 0.4959 leads to the rejection of the alternative hypothesis. Therefore, with the help of the LM test, the OLS model is accepted as a representational model for regression equation evaluation. The results of Group B pooled OLS models are shown in Table 6.

The evaluated Group B regressors are positive, which implies a positive relationship between the independent variables (XGS, FDI, and R&D) and GDP. Exports of goods and services, with a regressor of 0.56, have the largest impact on GDP value variation (Table 6). This further leads to the conclusion that the goods and services exports growth of 1% influences the growth of GDP by 0.56%. Research and development expenditure, with a coefficient of 0.17, has a significant impact on GDP. Foreign direct investments net inflow, with a coefficient of 0.01, is not a statistically significant factor in the explanation of GDP value movement.

Table 6. Results of the Pooled OLS model of Group B

Dependent Variable: D(lnGDP)				
Method: Panel Least Squares				
Variable	Coefficient	Str. Error	t- Statistic	Prob.
C	-0.003987	0.008556	-0.465983	0.6426
D(lnXGS)	0.556318	0.053977	10.30653	0.0000
D(lnFDI)	0.010368	0.009010	1.150690	0.2535
D(lnR&D)	0.166033	0.042386	3.917153	0.0002
R- squared			0.763863	
Adjusted R- squared			0.754418	
F- statistic			80.870870	
Prob(F- statistic)			0.000000	

Source: Authors' calculations

Based on the analysed independent variables, GDP variation movements of 75.44% can be predicted (Adjusted R- squared value 0.754418). F-statistics, with a value of 80.87, shows that the defined model is adequate for GDP movement prediction. This is also confirmed by the F-statistics probability value (0.0000), which is less than 0.05.

Based on the illustrated OLS model analysis, the econometric equation for Group B regression can be defined, and it defines the relationship among GDP, XGS, FDI, and R&D:

$$\ln GDP_{it} = -0.004 + 0.56 \ln XGS_{it} + 0.01 \ln FDI_{it} + 0.17 \ln R\&D_{it} \quad (5)$$

After the determination of the Group B regression equation, multicollinearity and heteroscedasticity were examined. The presence of multicollinearity in the Group B regression model was determined by the application of the Variance Inflation Factor. The obtained results are shown in Table 7.

Table 7. The variance inflation factor of Group B

Variable	Coefficient Variance	Uncentered VIF	Centered VIF
C	0.000073	1.609750	NA
XGS	0.002914	2.198922	1.438847
FDI	0.000021	1.151717	1.149906
R&D	0.001797	1.648846	1.321705

Source: Authors' calculations

The implemented Group B variance evaluation implies the absence of multicollinearity problems. The Centered VIF value for all the observed variables is lower than 10 (Table 7), which is also a limiting value for multicollinearity presence evaluation. According to the results, The Centered VIF amount for exports of goods and services is 1.44, the amount for foreign direct investments net inflow is 1.15, and the amount for research and goods expenditure is 1.32.

The presence of heteroscedasticity is determined by the Likelihood Ratio Test.

Table 8. Panel Cross-section Heteroscedasticity LR Test of Group B countries

Likelihood ratio	Value	df	Probability
	4.790345	5	0.4420

Source: Authors' calculations

The null hypothesis of the LR Test implies that the residuals are homoscedastic, while the alternative implies that there is a problem with heteroscedasticity. Based on the Likelihood Ratio probability of 0.44 (Table 8), the null hypothesis can be accepted, and it can be concluded that the model does not have a problem with heteroscedasticity.

The economic growth of each country has its specificities, yet, generally speaking, the logic, goals, instruments, and development challenges are identical in most cases. In that vein, it is not rare for countries to fall into a 'middle-income trap'. Overcoming this problem can resem-

ble Sisyphus' labours. That is why the discovery of the causes for entrenchment into middle-income levels is of high priority for the creators of economic policy. The implemented regression analysis identifies these causes, and fulfils the necessary condition for overcoming the key obstacle on the way to reaching high GDP levels. Based on the values of the regressors of Group A and Group B, the basic development initiators can be identified, and the differences in the dominance of individual factors' influence on different GDP levels can be spotted.

Table 9. Regression coefficients of Group A and Group B countries

Development Factors	Group A	Group B	Statistical significance of regressors
XGS	0.26	0.56	Statistically significant
FDI	0.003	0.01	Not statistically significant
R&D	0.60	0.17	Statistically significant

Source: Authors' research

The analysis of regression coefficients (Table 9) allows for the conclusion that research and development expenditure represents the main initiator of economic development in high GDP level countries (Group A), while the exports of goods and services have a secondary significance. On the other hand, the main development support of middle-income countries (Group B) are the exports of goods and services. The exports' contribution to Group B's economic growth is two times larger than its contribution to the growth of Group A. Nevertheless, the R&D expenditure's contribution to development is 3.5 times lesser in Group B than in Group A. This imposes the conclusion that the main cause of entrenchment into middle-development is insufficient research and development expenditure.

The basic recommendation for the creators of middle GDP level countries' economic policies is to base their development strategies on the promotion and stimulus of export-oriented economy sectors. Yet, in this phase, they should also consider a gradual increase in R&D expenditure. Just as Gumus et al. (2015) emphasised, in countries with lower-middle income, R&D expenditure has a significant impact on economic development only in the long run. This is crucial, since it allows a country to overcome the 'middle-income trap'. China sets the example of a country whose increase in R&D expenditures began as it joined the group of developing countries. Therefore, in 2001, China had a GDP per capita value of 1,053 USD, while at the end of the observed period, its GDP per capita amounted to 10,216 USD. In the same period, China increased its R&D expenditure around 2.5 times.

CONCLUSION

The theoretical contribution of this paper lies in the fact that the results of Panel Regression analysis matched the exact data presented in Figures 2, 3, and 4 almost completely. The appointed model and the obtained regression equation explain the impact of the independent variables (FDI, EGS, R&D) on the dependent variable (GDP).

The practical dimension of this paper is reflected in the directions for developing countries, which point them towards increasing their research and development expenditure on time, so as to avoid the middle-income trap. More precisely, since the achievement of high development is a process, the creation and organisation of scientific institutions oriented towards education should likewise be recognised as a process. In this vein, it can be concluded that education and science are not an expense. On the contrary, they represent an investment into the most significant development factor. This conclusion is supported by theoretical research which states that, in relation to developing countries, research and development expenditure gives results only in the long run, and not in the short run. The efficient transfer of the results of scientific research into the economy also requires a higher level of organisation as regards these activities, and the whole of society.

The results of this Panel Regression analysis point to the conclusion that exports make the largest contribution to GDP growth on the middle development level, while research and development expenditure makes the largest contribution to GDP growth on the high development level. It is assumed that foreign investments have this function on the low level of income, when domestic savings are not enough to activate the economic cycle and put economic capacities into the growth function. They appear as a supplementary source of development financing. Therefore, there are two breakpoints on the development path, wherein one production factor loses its dominance and significance, and another takes over. The first breakpoint separates low-developed and developing countries, and the other separates developing and developed countries. The World Bank marked a GDP per capita level of 1,000 USD as the boundary between low and middle development. This round figure surely would not match the conclusions of this Panel Regression analysis, especially not for each country. The same refers to the boundary between middle and high development, defined as 12,000 USD of GDP per capita.

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ДОПРИНОС ФАКТОРА РАЗВОЈА ПРИВРЕДНОМ РАСТУ НА РАЗЛИЧИТИМ НИВОИМА ГДП-А – ЗАМКА СРЕДЊЕ РАЗВИЈЕНОСТИ

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Резиме

Овај рад анализира и квантитативно мери утицај страних директних инвестиција, извоза роба и услуга, и издвајања за истраживања и развој на раст бруто домаћег производа средње и високо развијених земаља. Значај анализираних фактора мења се у зависности од нивоа привредног развоја земље. На нижим нивоима развоја кључну улогу имају стране директне инвестиције. Њима се обезбеђује недостајући капитал којим се покреће привреда. Како би се прекинуо зачарани круг сиромаштва, земља мора да развија извозно оријентисане привредне секторе. Овим долази до средњег нивоа развијености. Опасност која прети на овом нивоу развијености јесте замка средње развијености.

Применом панел регресионог модела испитан је и квантитативно измерен утицај фактора развоја (страних директних инвестиција – FDI, извоза роба и услуга – XGS, и издвајања за истраживања и развој – R&D) на привредни раст земаља групе А (развијених земаља) и групе Б (средње развијених земаља). Групу А чине САД, Канада, Велика Британија, Француска и Кина, док групу Б чине Румунија, Бугарска, Србија, Хрватска и Северна Македонија. Спроведена анализа показала је да је доминантан фактор развоја код групе А издвајање за истра-

живање и развој, док је код групе Б доминантан фактор извоз роба и услуга. Издвајања за истраживања и развој имају три и по пута већи значај за привредни раст високо развијених земаља у односу на средње развијене земље. Са друге стране, извоз роба и услуга има два пута већи значај за привредни раст средње развијених земаља у односу на развијене земље.

Закључак који се може донети јесте да су издвајања за истраживање и развој кључ за решавање замке средње развијености. То даје смернице креаторима економске политике да на време крену са улагањима у науку и образовање. Поменути закључак подржавају и теоријска истраживања која кажу да код земаља у развоју издвајања за истраживања и развој дају резултате само у дужем периоду, али не и у кратком року. У кратком року је тешко изградити квалитетан образовни систем и ефикасне научне институције, што је предуслов ефикасног коришћења резултата истраживања у привредном развоју.

THE ROLE AND IMPORTANCE OF EMPLOYEE PERFORMANCE ASSESSMENT FOR THE SUCCESS OF HOTELS IN BELGRADE

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Abstract

In specific business conditions and crisis situations, the commitment to service quality and employee performance, i.e. the interdependence of these components, is extremely important. The quality of a service largely depends on the efficiency and effectiveness of workers, and on their permanent learning and improvement, which raise the employees' motivation to deliver a high-quality service. That is why efforts to promote the quality of services must be based on managing the behaviour and education of employees, which, from the aspect of synergy, leads to the so-called 'learning organisation'. Therefore, the permanent learning organisation is a concept that is becoming an increasingly widespread philosophy in companies oriented towards proactive behaviour. In order to see to what extent this philosophy-orientation is present in hotels in Belgrade, we conducted primary research in the following hotels: Majestic, Zira, Heritage, Holiday INN, and the Crown Plaza of the IHG hotel chain.

Key words: human resources, performance, hotel industry, learning organisation, training course, practice

УЛОГА И ЗНАЧАЈ ЕВАЛУАЦИЈЕ УЧИНКА ЗАПОСЛЕНИХ ЗА УСПЕШНО ПОСЛОВАЊЕ ХОТЕЛА У БЕОГРАДУ

Апстракт

У специфичним условима пословања и кризним ситуацијама, посвећеност квалитету услуге и учинку запослених, као и међузависност ове две компоненте, изузетно је важна. Квалитет услуге у великој мери зависи од ефикасности и ефикасности радника, као и од њиховог сталног учења и усавршавања, што подиже мотивацију запослених за пружање висококвалитетних услуга. Због тога

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се напори на унапређењу квалитета услуга морају заснивати на едукацији запослених и управљању њиховим понашањем, што са аспекта синергије доводи до такозване „организације која учи“. Стога је организација перманентног учења концепт који постаје све раширенија филозофија у свим компанијама оријентисаним на проактивно деловање. Да бисмо видели у којој мери је ова филозофска оријентација присутна у хотелима у Београду, спровели смо примарно истраживање у хотелима: *Majestic*, *Zira*, *Heritage*, *Holiday INN*, и *Crown Plaza*, који припада хотелском ланцу *IHG*.

Кључне речи: људски ресурси, учинак, хотелијерство, организација учења, обука, пракса

INTRODUCTION

In conditions of a general crisis, when workers feel, or have a realistic impression that their hotel consistently and adequately applies the instruments incorporated in all phases of human resource management (selection, training, performance evaluation, compensation and benefits), they are motivated to do their basic work, which is to be at the guests' service, vigorously (Živković, 2022).

Despite the extensive research on human resource practices, there are only a few studies on human resource management practices in the hotel industry (Djajasinga et al., 2021). Work performance, order, loyalty, accountability, inventiveness, and employee knowledge are all indicators of employee performance (Saputro, & Nawangsari, 2021; Tarigan & Rozzyana, 2018). Suherman (2021) defines performance evaluation as the process of measuring the employees' personality qualities, work behaviour, and job task accomplishments, which are used as a factor for decision-making judgments about activities in areas of employment. According to Sinaga and Nawangsari (2019), performance may be measured along various levels, such as work quality, work quantity, punctuality, attendance, and teamwork effectiveness. However, a universal system for measuring the performance of employees in the hotel industry does not exist. An effective system should be based on the availability of data and information, the validity of that information, and a responsible relationship. In addition, analytical, direct, and immediate data insight into employee information is also necessary. In this regard, it is necessary to develop a model whose goals are set according to the efforts of managers and the human resource market, as well as the needs of lower-level managers. Connecting managers' efforts and lower-level managers' needs with indications of worker success (which perform specific tasks) would result in a list of all tasks and objectives, and a broad set of employee performance indicators.

This would enable the system for measuring employee performance to be flexible, and easily adaptable if, and when, necessary. When the effects of interdependence are taken into consideration, the adaptabil-

ity of the application of this model and the management of indicators in accordance with changes in goals may be increased and improved (Andresen & Gronau, 2005). A key question arises during the evaluation of employee performance: how can the best form of performance evaluation be recognised, that is, which form has an effective applicability in hotel industry practice.

EVALUATING THE PERFORMANCE OF EMPLOYEES IN THE ANALYSED HOTELS

Research Methodology

This research was conducted through a survey and an interview. The research sample consists of the responses of 690 hotel employees working in the following hotels in Belgrade: Majestic, Zira, Heritage, Holiday INN, and the Crown Plaza of the IHG hotel chain¹.

The age structure of the respondents from the analysed hotels is as follows: (a) 7% of the respondents are ages 18 through 30; (b) 62% of the respondents are ages 31 through 50, and (c) 31% of the respondents are older than 50.

The respondents' level of education is as follows: (a) 13.6% have completed primary school; (b) 76.7% have completed secondary school; (c) 5.5% have a college degree; (d) 2.7% have a faculty degree; and (e) 1.3% have completed post-graduate studies (MA/PhD).

The work experience of the surveyed employees is as follows: (a) 5.8% have worked for up to 5 years; (b) 11.7% have worked between 6 and 10 years; (c) 34.83% have worked between 11 and 20 years; and (d) 47.67% have worked for longer than 20 years.

The number of foreign languages spoken by the surveyed employees may be expressed in percentages as follows: (a) 23.3% speak no foreign languages; (b) 66.3% speak one foreign language; (c) 9.2% speak two foreign languages; and (d) 1.2% speak three foreign languages.

Many business entities have extensive work ahead of them if they are to change their current behaviour and improve the quality of change management, as well as Total Quality Management (TQM), and Learning Management and Business Reengineering, or business process reengineering. Typically, four dimensions of the goal of reengineering are identified: reducing business costs; raising quality to a higher level; increasing the volume of production/turnover (increased capacity utilisation); and increasing work performance intensity and speed.

¹ Personal research conducted in the period between January and April 2022.

In addition, research was conducted in Belgrade hotels during 2022 using a variety of techniques, including on-site interviews, and e-mail, and telephone interviews. Methodology and forms (with instructions) were employed based on what was available on social media and instructions which were made public.

For this reason, the analytical method was applied in the research of IHG standards, which were explained through notes in the guide for human resources and employee performance evaluation.

The interviewees were introduced to the objectives of the guide and the ways in which it would help them understand (*Owner: Global & Performance VI 2021*):

- (a) what is expected of them as human resources managers;
- (b) how they could help team members work and contribute to the business; and
- (c) how they could offer support to help their team members ‘grow’.

An HR manager typically uses this guide:

- (a) after being appointed as the first human resources manager; and
- (b) as a refresher – a reminder of what is included in performance activities.

Expected Performance

In times of business crises caused by external factors, great attention is paid to employees, their advancement, and the preservation of the positions of both the hotel as a business and individual employees. As Čerović (2011) explains:

An employee who is satisfied and happy at his workplace will more easily identify with the company’s goals, so he/she will work for it, not in it. If basic necessities are assumed, specific employee motivating methods are also emphasized nowadays, and it is precisely the intangible acknowledgment and permission of their more inventive form that is highlighted.

(Čerović, 2011, pp. 24-25)

The employees’ emotional engagement leads to pleasure and a proactive attitude in carrying out their tasks and commitments (Rivaldo, 2021).

By comparing the results achieved in 2019, a period before the general business crisis, with the business results achieved during a more difficult period of ‘disrupted’ business, it can be concluded that hotel companies achieved a drastic drop in turnover – the turnover after 2019 measured only 34.51%. The trend of falling realisation, i.e. falling turnover, continued in 2021 and 2022.

However, despite the obvious business crisis caused by the global health crisis, the managers of certain services in the analysed hotels were

asked to rank certain abilities and professional characteristics of their employees, in accordance with their own views. The managers completed the ranking by assigning a rank between 1 (least valued) and 6 (most valued) to eight different employee characteristics and abilities.

Table 1. The ranking of desirable employee characteristics, according to hotel services (n=80)

Abilities and Characteristics	Average rank
Communication skills	2.80
Focus on the guest	3.10
Knowledge of statutes, regulations and laws	3.45
Orientation to teamwork	4.10
Mastery of IT technologies	4.25
Organisational abilities	4.37
Initiative	4.41
Emotional stability	6.10

Source: Adapted from Živković, D., 2022

In specific business conditions and crisis situations, the commitment to service quality and employee performance, i.e. the interdependence of these components, is extremely important. Improved performance is essential for most organisations; consequently, managers design ways to increase performance and measure it on a regular basis (Kaledi et al., 2021; Imran & Tanveer, 2015). Employee performance, in terms of strengths and weaknesses, requires evaluation in order for an organisation to provide opportunities for their top workers' career objectives by determining compensation, offering promotions, and observing employee behaviour (Sari et al., 2021).

The quality of a service largely depends on the efficiency and effectiveness of the workers, and their permanent learning and improvement, which raise the employees' motivation to deliver a high-quality service. In conditions of a general crisis, when workers feel, or have a realistic impression that their hotel consistently and adequately applies the instruments incorporated in all phases of human resource management (selection, training, performance evaluation, compensation and benefits), they are motivated to do their basic work, which is to be at the guests' service, vigorously (Živković, 2022). That is why efforts in promoting the quality of services must be based on managing the behaviour and education of employees, which, from the aspect of synergy, enables the establishment of a 'learning organisation' system. Therefore, the permanent learning organisation is a concept that is becoming an increasingly widespread philosophy in all adaptable companies, from the largest, transnational companies to the smallest, local companies.

Table 2 The relationship of employee performance ratings - team members' evaluations of a specific employee

Indicator	participation in the structure %
1 Expertise	23
2 Quality of work	20
3 Punctuality/Presence	21
4 Rationality	17
5 Attitude	15
6 Personal characteristics	13
7 Team work	13
8 Flexibility	10
9 Relations with service users	11
10 Relationship with authority (manager)	09
11 Independence	11

*In the structure, the sum is greater than one hundred, since multiple answers are allowed.

Source: Survey conducted in hotels (April, 2022).

It is considered among management that this type of employee characteristics evaluation is the most realistic, because the employees know each other best. Therefore, this employee performance evaluation model is recommended for other hotels, especially if they are of approximately the same size and structure. In this context, the location, or micro-location, of the hotel is not a negligible matter either.

By making improvements within the domestic hotel industry, in hotels that belong to hotel chains, an entrepreneur and hotel manager can combine their own experiences by implementing the following rules (Savov, 2019, pp. 184-192):

- (a) It is the duty of every employee to come to the workplace fifteen minutes early, so that the shift can be handed over according to protocol, so that all the necessary information can be conveyed, and so that the work of the next shift can be facilitated;
- (b) Wearing a clean and ironed uniform and name tags is mandatory for all employees. Male employees must be neatly groomed, while female employees can wear discreet make-up and inconspicuous jewellery, and must have their hair tied in a ponytail or bun;
- (c) Employees are forbidden to allow guests behind the reception desk, to regulate the temperature in the hotel, and to use the elevator for guests, except when showing the hotel to a potential client, when carrying the guests' luggage, or when the elevator is being cleaned or maintained;
- (d) All employees must provide feedback to guests upon request.

A survey related to education and professional development was distributed to 270 employees of Belgrade hotels in March 2022. The re-

sults of the survey allow us to conclude that the learning of employees has an impact on the quality and performance evaluation of specific persons at work.

Overview 1. Attitude of employees towards permanent learning and improvement

1	Unsatisfactory attitude	0.00%
2	Required progress in learning	27.29%
3	Satisfactory level	50.88%
4	Good	19.80%
5	Exceptional	2.12%

Source: Survey conducted in hotels, March 2022.

The Evaluation of Employee Performance

Of the total number of the employees of the hotels analysed in 2022, 4.7% have a college degree, 15.3% have a vocational college degree, and 80% have completed secondary school. In order to evaluate the performance of the employees in direct contact with hotel guests (receptionists, waiters, kitchen staff, room cleaners, suppliers, etc.) and their superiors, or operational managers, questionnaires were distributed after a period of training and the innovation of knowledge belonging to their domains. The workers and their superiors, who are, by nature of their work, inextricably bound to their relationship with their guests, were surveyed and the questions were related to the levels of their performance realisation, i.e. the jobs and tasks they were assigned to.

The first questionnaire included questions related to personal data about the employees (gender, age, work experience in the hotel industry, level of education, additional training, and specialisation).

In the second questionnaire, employees were asked to evaluate the use of specific indicators and individual instruments of human resource management in their hotel.

The content was designed and presented as follows: Part I – One’s own service behaviour (expected and exceeds expectations); Part II – One’s own ability to serve; and Part III – The general assessment of the use of certain management instruments.

During the survey period (March through April 2020), workers voluntarily gave ratings and answers on a pre-defined value scale ranging from 1 to 5, wherein 1 corresponds to the statement “I do not agree at all”, and 5 corresponds to the statement “I completely agree”.

Scales developed by well-known experts were also used. Subject to evaluation were the four instruments which form the basis of effective human resource management in a hotel:

- (a) The selection of candidates (3 factors);
- (b) The training of interested parties (5 factors);
- (c) Perceiving and evaluating performance (3 factors); and
- (d) Compensation and benefits (4 factors).

The aforementioned instruments and factors are included in part A of the second questionnaire for employees.

Scales for assessing the level of service attitude towards guests, designed as employee-employee evaluations and self-service (behaviour) reports, were constructed to assess two aspects of the service behaviour of hotel employees: (a) the standard, or expected, service behaviour, displayed under regular business conditions (3 factors); and (b) the behaviour displayed while providing services exceeding expectations (3 factors).

These aspects and instruments are included in part B of the second questionnaire for hotel employees. The goal was to measure service relationship in relation to the evaluation of employees. To this end, a three-part scale was used (part C of the second questionnaire for employees).

The quality of service implies an operationalised set of required levels of formal and informal education, as well as certain skills and business experience, that is, routines in performing tasks when providing a specific service. In order to test the previously defined hypothesis, a classic and reliable statistical method (multiple regression) was used.

However, in order to achieve a realistic result, all resources and standard deviations were taken into account for all functions and variable sizes. Additionally, the independent matrix of interrelations (correlations) of all functions and variables used in proving the hypothesis was considered. In such an anticipated situation, although all the scales are known in literature, a scale validation procedure was conducted by using the following, common types of quantitative analyses (Vučković, 2013):

- (1) Analysis of correlation (interrelation) of factors;
- (2) Analysis of interrelationships (correlations) of all factors together; and
- (3) Multicorrelation analysis (Mediation testing).

Table 3. Human resource management instruments and service behaviour

Description	Expected service behaviour			Service behaviour exceeding expectations		
	β	t	Sig	β	t	Sig
Ability to serve	.393	4.227	.000	.394	3.918	.000
Selection	.069	.487*	.622	.255	1.745*	.090
Training course	-.158	-1.191*	.236	.207	1.451*	.151
Performance evaluation	.340	2.864	.005	.091	.704*	.485
Compensation and benefits	.224	.931*	.059	-.241	-1.928*	.058

* $P < 0.05$ statistically significant relationships at the 0.05 level.

Source: Adapted from Vučković, J., 2013

In the effective evaluation of performance, the t-test (statistically significant relationships are marked with *) or/and Sig value (values greater than 0.05 show a statistically significant relationship) are used as relatively reliable statistical methods, and as the starting criteria and benchmarks for the observation and evaluation of possible, statistically observed, and important relations between the predicted (and expected) use of indicators of human resource management by employees and the service behaviour of employees in the hotel industry. According to the results (presented in Table 3), we can state the following (Vučković, 2013, pp. 224-226):

(1) The assumed system of *selection*, as a very important indicator of human resource management in the hotel, is significantly correlated with *expected service behaviour* ($t=0.487$, $P<0.05$) and *service behaviour exceeding expectations* ($t=1.745$, $P<0.05$);

(2) The *training system*, as an important indicator of human resource management, has a significant relationship with *expected service behaviour* ($t=1.191$, $P<0.05$);

(3) As expected, the expectations of the application of *compensation and benefits* as an element of human resources management has a significant relationship with *expected service behaviour* ($t=1,931$, $P<0.05$), as a statistical variable;

The above results show that the employees' perception of the application of human resources management instruments in the analysed hotels is related to their service behaviour, which further leads to the conclusion that expectations have been met.

RESEARCH RESULTS

Majestic Hotel

In this hotel, based on the performance of employees, the main emphasis in the human resources management process can be summarised as being placed on:

- a) Change in the organisational structure, from functional sectors to working (executive) levels;
- b) Changes in the job execution components of complex jobs, with the aim of increasing the level of time utilisation in work as much as possible;
- c) Changes in the provision of services of individuals, from subordinates to participants who have authority;
- d) Changes in the approach to work, from simple training to complex education;
- e) Changes in the work performance evaluation system, from activities to effects;

- f) Changes in the value system of advancement, from performance to abilities;
- g) The improvement of the value system, and business and organisational culture – orientation towards hotel guests, not pleasing managers;
- h) Changes in the work of managers – instead of occupying the role of controller, managers occupy the roles of instructor and mentor;
- i) The decentralisation of management, with the aim of having fewer hierarchical levels;
- j) Changing the manager's role from supervisor to leader.

Hotel Zira

The process of human resources planning, which usually consists of 4 phases, is applied at Zira Hotel (Hotel Zira, 2020): (a) data collection in the internal and external environment (internal, organisational environment factors, and factors of the external environment); (b) anticipating needs (supply and demand) for human resources by use of the quantitative and qualitative methods; (c) matching the supply and demand for working personnel (non-compliance can result in a surplus, wherein the supply exceeds the demand, or a state in which the expected demand exceeds the expected supply); and (d) the monitoring, evolution and correction of the plan.

Human resources planning at the Zira Hotel is a very complex and responsible task entrusted to the human resources manager, whose performance is evaluated by the hotel's employees. The evaluation is based on the survey, and the answers were provided on a value scale ranging from 1 to 5, according to the normal scale. For example, the answers to the question "Does the manager give clear and precise instructions when communicating with employees", given by 40 respondent, are presented in the following table:

1	I do not agree at all - they are neither clear nor precise	0%
2	I do not agree	6%
3	I have not formed an opinion	19%
4	I agree	56%
5	I completely agree	19%

Source: Survey conducted in hotel Zira in February 2022;

Managers are responsible for enabling their employees to achieve the desired results. Reviewing the results of their employees is essential, because it can inform managers whether or not something can be done within the agreed upon time frame. Moreover, performance assessment is

a valuable instrument not only for evaluating the workers' performance but also for their growth and motivation (Palinggi & Mawardi, 2020)

The purpose of reviewing employee results is to properly support the future work of employees, or to redirect them if necessary. Evaluation assists in reviewing the completed work with the aim of finding gaps and flaws that must be corrected, in identifying possible underutilised skills of employees, and in developing appropriate training programmes (Tien et al., 2021). Praise for a completed or well-done task can increase the employees' motivation to work. The evaluation system (performance evaluation) allows managers to see the results and the efficiency of the work cycle. Human resources organisational units require each line manager to conduct staff performance evaluations on an annual, semi-annual, and often quarterly basis. The direct line manager is usually the key person in this process, or the only source of feedback and evaluation. In most cases, this is the person who conducts the appraisal interview. The advantage of performance evaluation is the fact that the immediate supervisor usually knows which tasks an individual has performed and how well they have performed them. Annual performance evaluation is a logical consequence of the ongoing implementation of work efficiency management, which takes place between the supervisor and the employee, who is specifically evaluated in real time, during the year.

Self-assessment is a model that is also applied in Hotel Zira, and it consists of preparing for the assessment interview (approval interview), and filling out a special form on the assessment of one's own work. Line managers may informally invite co-workers and those to whom they are superiors to contribute to the assessment of individuals, but these are not the only sources used.

Salary elements are determined in accordance with the basic mission and vision of the company, and are aimed at fostering the specific principles and actions of individual employees. Fixed amounts and parts of salary are paid regularly, on a weekly or monthly basis, and are changed only in exceptional circumstances. They are usually determined by the specifics of the contract, such as: monetary incentives (working shifts or only at night), benefits (sick leave, paid meals, vouchers) and special additions ('tuning'). Variable elements, and different bonuses, incentives and overtime compensation, can vary from employee to employer.

The Zira salary system consists of the following elements (Hotel Zira, 2020):

- (a) Basic salary – regular, fixed salary;
- (b) Privilege – paid meals in shifts, or paid tickets for public transport;
- (c) Reward for employees who work night shifts, calculated separately.

Bonuses and overtime are not paid, and management does not practice incentive pay in order to motivate employees, despite good business.

Promotions, transfers and demotions come as a result of employee performance evaluation. The different types of employee displacement within the hotel – promotions, transfers, demotions and dismissals are key elements related to human resources in this hotel as well.

On the other hand, the possibility of advancement is, in most cases, an important incentive for the realisation of above average results in hotel management. Even though salary and benefits have a strong influence on work satisfaction, and have a direct impact on work performance (Pham Thi et al., 2021), it is necessary to improve the manner in which salaries are determined and calculated, so that they are the result of achievement, and not the result of favouritism².

Hotel Heritage

When evaluating the performance of line managers and reception staff who are in direct contact with guests, the operational managers of Hotel Heritage analyse the results of a questionnaire filled out by guests in order to gain insight into the quality of employee engagement.

From the standpoint of performance evaluation, a positive assessment on all fifteen questions of the questionnaire represents the ideal result, while a positive assessment on more than eleven of the questions represents a good result which conveys the impression that an employee thinks about their customers, or guests, and takes care of the quality of service which is provided to them.

An average result is represented by a positive assessment on eleven of the questions, or less, while a positive assessment on less than seven questions represents a bad result which leaves a lot of room for improvement.

From the standpoint of human resources management, it is necessary to analyse the causes of the negative responses by evaluating the performance of specific hotel employees, so as to be able to correct their behaviour and attitude. The results can be a good guide on how to improve the employees' attitude towards guests and raise it to a higher qualitative level. To that end, it is necessary to set standards and respect procedures during work, because these factors directly affect guest satisfaction. The overall behaviour of the employees not only helps the hotel position itself higher on the market but also ensures that the hotel maintains a high position if it has already reached it.

² Internal documentation of Hotel Zira, 2022.

Overview 2. Example of a questionnaire on hotel care for clients (guests)

Are your guests at the forefront of the hotel business?	Positive	Negative
1. Do you occasionally ask your guests to underline their expectations regarding this hotel company?		
2. Do you demonstrate a certain courtesy and level of respect to each guest or colleague regardless of circumstances?		
3. Do you strive to learn as much as possible about your guest and the company they work for?		
4. Do you immediately respond to guest complaints?		
5. Are you answering the phone right now?		
6. Do you always anticipate a little more time for service or correction, in case of unforeseen events?		
7. Do you record opinions about the level of service quality of your hotel?		
8. Do you receive letters in which guests express their gratitude for your cooperation and reception?		
9. What is the essence of your work - meeting the needs of your guests, or increasing the occupancy of the hotel and its profits?		
10. Do you check if the guests are satisfied with the service?		
11. Do you provide special conditions and benefits for your loyal guests?		
12. Do you sometimes surprise your regular guests with an unexpected service?		
13. Do you show enthusiasm when serving your guests?		
14. Do you continuously request modalities in order to improve the level of quality of your service?		
15. Do you occasionally thank your regular guests for their cooperation and support?		

Source: Adapted from: www.plark.net/literatura/mng053.php

Holiday Inn

In this hotel, a special way of evaluating and rating the performance of employees has long been in effect. In the hotel, they are convinced that this has contributed to management’s more realistic assessment of the quantity and quality of the employees’ share in the fulfilment of the hotel company’s tasks. In general, for management, the evaluation process represents a very important lever, on the basis of which the scope and quality of the performance of a specific employee can be determined. This work is based on individual plans, determining and harmonising individual goals, and monitoring their realisation, and it leads to a continuous conversation among everyone in the hotel. The employees of the hotel believe that the working conditions created in this way, and the treatment stemming from the results, contributed to each employee’s better knowledge of not only the hotel’s goals but also the importance of their individual contribution to the overall success of the organisation. When it

comes to newly hired workers, their first evaluation can be done periodically during the year, quarterly or annually.

Evaluation is also done when an employee changes their position (workplace) either by advancing within the department or by transferring to another department. Additionally, performance evaluation is done in cases of promotion or demotion.

The evaluation is done via a form that is the same for all employees – one copy is filled out by the employee, and the other by the head of the department or work team. Each question carries a performance rating ranging from 1 to 5. When the form is filled out, the employee and the manager compare their answers, justifying and explaining each one from their own point of view. Usually, the numerical and qualitative assessment of the manager is the final assessment submitted to the director for review.

IHG – Hotel Crown Plaza

The corporate idea that guides this hotel group is that “we all have an important role to play in achieving our purpose of providing true hospitality for good, and our ambition to grow”. The company’s approach to, and view of, performance should provide an answer as to whether a simple framework, which gives everyone room to grow and be at their best, exists.

Overview 3. Movement and performance recognition

Objectives	Behaviours/values	Development	Overall effects
Setting clear goals helps us focus on the things that matter most.	The persistence of our behaviour allows us to grow and develop the culture needed for success.	They help you develop the skills and abilities to achieve our work ambition.	A mixed grade, <i>strong</i> or <i>exceptional</i> , is given at the end of the year, based on these 3 key areas.

Owner: Global Talent & Performance V1 2021

IHG Hotel & Resorts operates on a cycle that includes: (1) setting goals; (2) performance and development verification; (3) the effects and calibration of development; (4) the discussion of the review at the end of the year; and (5) reward recommendations.

This hotel, or hotel chain, formulated a simple (interdependent) framework that gives everyone the room and the opportunity to be at their best, that is, to achieve an exceptional performance (*Confidential, Improving Performance – Managers’s guide, Version 1, May 2021, p. 3 of 6*).

Overview 4. The process of achieving an exceptional performance

Goal +	Behaviour/Value +	Development +	Overall Performance (OP)
Setting clear goals helps us focus on the most important things	Our behaviour allows us to grow and develop the culture we need to be successful	It helps us develop the skills and abilities to move forward, it will help us achieve our growth ambition	A grade of mixed, strong or exceptional is given at the end of the year based on these three key areas

Source: IHG, www.ihg.org

During the year, managers in the hotel compile a report – an individual evaluation of the performance of employees (*Confidential, Improving Performance – Managers’s guide, Version 1, May 2021, p. 3 of 6*).

Overview 5 Areas to consider and examples that can be used

Key questions	Reactions of Miloš (HR manager)
1. What has happened/what are your key achievements?	▪ Made a significant contribution to the “Journal for Tomorrow” initiative
2. What goals did you focus on - what were your priorities?	▪ His enthusiasm, drive and passion do not go unnoticed, his problem solving skills are excellent, as is his rapport with guests
3. Behaviour - what did their behaviour show?	▪ He has expressed interest in moving into a revenue management role in the coming year. To help him develop, Oliver will need to focus on building his strategic thinking skills using his commercial awareness.
4. Development area - what have you learned this year?	▪ Oliver juggled challenging circumstances this year, personally and professionally, showing resilience and strength.
5. Well-being – were there any key points in the focus areas of the year where you were exposed to inconvenience?	▪ Next year presents numerous opportunities. Oliver should use his current skills to further develop other skills, to prepare him for future success in revenue management.
6. Focus for next year - what should be your areas of focus?	

Source: IHG, www.ihg.org

What you should do as a hotel HR manager: managers complete a 200-word summary in the MyHR/My Talent/Local Talent System pattern, along with the suggested overall performance rating and talent assess-

ments (*Confidential, Improving Performance – Managers’s guide, Version 1, May 2021, p. 56*).

As needed, additional resources include a personal yearly review guide, HR Manager Exceptions, an annual review to start a conversation, a personal template, How to Guide a Manager in MyHR Template, and a timetable for performance management. A person should become acquainted with the following sample of a 200-word summary, which can be found in the HR tools and the People Managers handbook.

DISCUSSION

Performance evaluation (employee performance evaluation) refers to a series of complex operations in which the contribution of each individual (individual contribution) to the organisation’s (hotel’s) aspirations in a specific time frame is evaluated, measured, and then valorised. The procedure applies to all hotel employees, including supervisors at all levels of the organisation.

Errors inevitably occur during the complex process of performance evaluation. The errors made by evaluators in assessing their employees’ performance can be: (a) errors of consideration; (b) errors of rigour; and (c) errors of central tendency.

To discover these fundamental flaws, the average value of the grades can be compared with the obtained mean grade seen on the set scale on the basis of which performance is assessed. If the average value of the grade is below the obtained mean value on the corresponding area of the scale, an error of strictness has occurred. When the average grade is equal to, or approximately equivalent to, the mean value on the grading scale, then it can be said that there was consideration during grading.

The third possible outcome of the evaluation is the result of the evaluator making a mistake. When the average value of the evaluation is almost equal to the mean value on the evaluation scale, it is claimed that an error of central tendency in performance evaluation has occurred. It is considered that the first three types of mistakes (prudence, rigour, and central tendencies) are perhaps the outcome of the so-called ‘narrowing’ of ‘the range’. This narrowing of the range illustrates the inclination of the evaluator to focus the marks he gives for one position on one point of the grading scale. The apparent consequence of such an assessment error is that practically all workers are graded with the same grades (high, low, or average), which means that the obtained evaluation results are unreliable. In order to avoid misunderstandings caused by such behaviour among evaluators, it is necessary to perform the evaluation after observing the employees of the hotel, and to base the evaluation on their relationship with the employees during the direct performance of work and work tasks in hotels. However, if a competence profile for the performance of a job

is defined, then that specific profile could be used when considering the results of performance evaluation.

In order for an organisation to obtain the greatest possible business results, the complicated process of performance assessment must be based on systematic and continuous observation, valuing, and referring, as well as the adaptation of employees, and the results of their work and behaviour. The performance evaluation process is based on appropriate criteria and methods, and a systematic approach to performance valuation. The overall process involves the submission of employee data following the performance review. In addition to directly affecting the success of the business, the results of performance assessment and evaluation affect visitor happiness and, in particular, employee education. This also implies that performance evaluation is the best guide for hotel managers striving to increase the efficiency and effectiveness of hotel operations. If the performance of jobs and work tasks in hotels is not satisfactory or even average as a result of the employee's insufficient expertise or competence, unfavourable business results are to be expected, which in turn leads to the business being positioned lower on the market compared to its competitors. Hence, these areas are critical areas of human resource management, and appropriate measures are required. Among other things, it might be an essential signal for educational institutions to create student education programmes. Employees should be given access to realistic training and education programmes, as well as relevant seminars and symposiums. The most crucial component that distinguishes those who are successful from those with inadequate success in business, particularly during times of crisis, is the knowledge they possess. Attained skills and the overall contingency of information are critical components by which hoteliers gain (and keep) a competitive position in a more turbulent and demanding market.

CONCLUSION

In terms of compensating personnel, important conclusions can be drawn from the analysis of four and five-star hotels:

(a) In order to achieve better results, creating a reward system based on relevant stimuli is required;

(b) In terms of remuneration, each employee finds his or her position in relation to other employees.

According to research, employees, regardless of their prominence and position in the company's hierarchy, typically quit the hotel company primarily because they are dissatisfied with their own wages in comparison with the wages of their colleagues. Thus, practically every employee wants to be paid 'fairly' for their involvement in the execution of a job when there is no severance pay, i.e. to be paid more or less as a reason-

ble equal to their colleagues. This is the employees' attitude about payments, but it is in the hotel company's best interests to consistently fulfil the business' defined goals, so as to guide the organisation to align its interests with a large number of employees. A long-term incentive system based on these assumptions can be created only if the interests of the employees and the company are coordinated. When observing the hotel company's place and function, in relation to not only the dynamics of its development but also its placement in an increasingly turbulent market, it becomes evident that the real situation in each hotel is uniquely difficult.

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УЛОГА И ЗНАЧАЈ ЕВАЛУАЦИЈЕ УЧИНКА ЗАПОСЛЕНИХ ЗА УСПЕШНО ПОСЛОВАЊЕ ХОТЕЛА У БЕОГРАДУ

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Резиме

На основу истраживања спроведеног у анализираним хотелима, може се закључити да организационе јединице људских ресурса захтевају да сваки линијски руководиоца врши процену учинка свог особља на годишњем и полугодишњем нивоу, а често и тромесечно. Директни линијски менаџер је обично кључна особа, или једини извор повратних информација и евалуације, а у већини случајева то је особа која води интервју за оцењивање. Предност ове чињенице огледа се у томе што непосредни руководиоца обично зна већину послова које је појединац обављао и колико их је добро обављао. Годишња оцена учинка је логична последица текуће имплементације управљања ефикасношћу рада, која се одвија током године између руководиоца и запосленог који се посебно оцењује у реалном времену. Спроведено истраживање је показало да су запослени веома заинтересовани за постизање „фер“ противвредности за активности у реализацији послова и радних задатака. Према резултатима истраживања, запослене занима и интерна правичност у накнадама у односу на остале колеге. То је и интерес хотела који настоји да оствари усвојене пословне циљеве и постигне адекватну мотивацију запослених.

Истраживање је показало да су се хотели трудили да овај посао обављају самостално. Међутим, очигледно је да недостају потребна знања, па је редослед активности био погрешан. Очигледно је да је прво требало увести систем планирања и систем за мерење пословних резултата, како на нивоу хотелског предузећа, тако и у појединим секторима. Недостајала је планска и институционализована припрема за увођење система награђивања. Напомињемо да су примењени неадекватни прописи о материјалном и нематеријалном стимулисању запослених, што резултира тиме да добри радници напуштају хотеле, док у њима као запослени остају они који се у пракси називају „експлоататорима“ организације. Пословна ситуација се разликује од хотела до хотела. Такође, може се приметити да не постоји континуирана контрола примене мотивационих фактора и инструмената, што је неопходно због брзих промена у окружењу. С обзиром на то да је сваки хотел специфичан, менаџмент хотела треба да избегава усвајање решења из праксе других хотела – она могу бити оријентир, али их није могуће у потпуности копирати и применити.

* Докторанд

THE IDENTITY OF FAMILY FIRMS FROM THE PERSPECTIVE OF OWNERS ACCORDING TO THE GENDER CRITERION AND THEIR SOCIAL ROLE

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Abstract

The aim of this paper is to investigate the determinants relevant to the identity of family enterprises from the perspective of their owners, in order to determine the differences in perspective according to gender, and to point out their social role. To this end, small and medium-sized family-owned enterprises operating in Serbia were observed. The focus was on determining their identity and the wider (social) role they play. It has been established that there are significant differences in certain attitudes of the owners of small and medium-sized enterprises stemming from a difference in their genders, which affects their identities and the positioning of the role they play in society.

Key words: family business, identity, social role, gender criterium

ИДЕНТИТЕТ ПОРОДИЧНИХ ПРЕДУЗЕЋА ИЗ ВИЗУРЕ ВЛАСНИКА ПРЕМА РОДНОМ КРИТЕРИЈУМУ И ЊИХОВА ДРУШТВЕНА УЛОГА

Апстракт

Циљ овог рада био је да се истраже одреднице које су релевантне за идентитет породичних предузећа из визура власника, утврде разлике према полу и укаже на њихову друштвену улогу. У том контексту, посматрана су породична - мала и средња предузећа која послују у Србији фокусирајући се на утврђивање њиховог идентитета и шире (друштвене) улоге коју они имају. Утврђено да постоје значајне разлике у одређеним ставовима власника малих и средњих предузећа према њиховом полу, што утиче на њихове идентитете и позиционирање улоге коју имају у друштву.

Кључне речи: породични бизнис, идентитет, друштвена улога, родни критеријум

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INTRODUCTION

The importance of family businesses to the global economy is paramount (Gomez-Mejia et al., 2007). In this sense, their close connection to economic and social transformation is emphasised. The importance of family businesses for the national and world economies is usually underestimated. An enormous number of family businesses is a reality, but their contribution to employment is underestimated. Despite the prevalence of family businesses, thoughtful analyses of their contributions and strengths are rare. The presence of family firms should not only be seen as the result of a certain set of technological, financial, legal and market conditions but should also be seen as capable of influencing the political context, and thus the legal system and framework in which they operate. Despite considerable discussion of the benefits of family social capital in family business research, it remains unclear how it is created and maintained by business families in the context of learning about their identity.

It is generally accepted that the participation of family members in a business makes the family business unique; however, there is no single definition of a family business, that is, literature has and continues to have difficulties in defining it. The main problem in defining a family business is the wide variation of the examined subject (Klein, 2000). Small, medium and large enterprises are treated under the name 'family enterprises'. Qiang (2014) explains that: "Family firms have some unique characteristics, such as concentrated ownership, long investment horizon, and reputational concerns" (p. 2). The importance given to socio-emotional wealth is precisely the factor that marks the differences between family-owned and non-family-owned firms. However, regardless of the fact that this is a very important issue, measuring socio-emotional wealth is very complex and quite difficult, due to the lack of psychometrically sound measures (Debicki et al., 2016). It is considered that the non-financial value that the family realises through its association with the firm is actually an expression of "social-emotional wealth" (Berrone et al., 2010, p. 47).

The key question is how family businesses can survive across generations and decades. The interaction between multiple social, family and financial factors is very complex (Romano et al., 2001), and there is a research gap in this area. What is evident is that media attention is primarily focused on dysfunctional phenomena in family firms (Colli, 2003).

What is common to all companies, regardless of their size, is the measurement of achieved performance (Brown et al., 2020; Mitrović et al., 2021). Due to the influence of internal and/or external factors, the company may cease to operate (Milašinović et al., 2019; Matejić et al., 2022; Srebro et al., 2021). It is considered that family firms are not gender neutral. Shaw et al. (2009) showed that female business owners perceive the firm's performance differently, and that female-owned family

businesses adopt different business growth patterns than those established by men.

After this introduction, the paper is sectioned as follows: it begins by establishing a conceptual context for analysing the concept of identity and how it is articulated within the perspective of the family business from the owner's point of view; next, we consider the socio-economic role of family businesses; finally, the paper considers family business interactions, before discussing the research methodology, findings and conclusions.

LITERATURE REVIEW

Family involvement in business makes family business unique, but literature has not provided a generally accepted definition of the family business. One of the definitions, according to Zachary (2011), is "that a company is considered a family business when it is closely identified with at least two generations of a family and when this relationship has had a mutual influence on the policies of the company and the interests and goals of the family" (p. 30). Social sciences generally recognize the dimension of gender affiliation as a response to any type of social event (Danes et al., 2009). Simonović et al. (2019) point out that resources in Serbia are managed differently according to gender, but also according to other criteria.

Among the many traditions of 'identity' research, two somewhat different, but strongly related strands of Identity Theory have developed. The first one, which is reflected in the paper of Stryker & Sepre (1982), focuses on the connections between social structures and identities. The second, reflected in the paper of Burke & Stets, (1999), focuses on the internal process of self-verification (Stryker & Burke, 2000). The identity of the people involved in the transaction is the main determinant of the institutional modality of the transaction. The family is the location of transactions in which identity dominates, but it is also a relevant factor in the market (Ben-Porath, 1980). Identity can be defined as "an internalized set of expected behaviours associated with a certain role, where the role represents a social category such as parent, teacher, or entrepreneur" (Cantor & Mischel, 1979, p. 38).

In recent times, there has been a significant increase in the understanding of the area of the family business, especially in terms of understanding their socio-economic role. Growing research attention has helped to clarify and understand a variety of internal organisational mechanisms and behaviours. In addition, in the area of organisational identity, there is a complex dynamic and specific interaction with the environment, which affects the identity of family businesses. Moreover, "the interrelationship between different identities, such as between family and business can influence the definition of strategic priorities" (Miller &

Le Breton-Miller, 2011, p. 1052). Consequently, there was a fragmented conceptualisation related to the consideration of specific identities.

Literature contains a lot of generalisations about women's and men's views of the family business (Adamović et al. 2022). At the initial level, women are less likely to become entrepreneurs (Garg & Chastri, 2022). Research has shown that gender matters when comparing the performance of businesses owned by men and women.

Family firms were mostly viewed through the positive and negative aspects of their relations with interested parties, which can mainly be attributed to the existence of different orientations towards corporate social responsibility (Deniz et al., 2005). Johansson & Ringblom (2017) point out that framing a business case makes it easier for companies to deal with issues of gender equality, but they are also of the opinion that it is difficult to resolve issues related to conflicts of interest and power relations within the discourse of business cases.

METHODOLOGY AND ANALYSIS

The research framework is presented below (Figure 1):

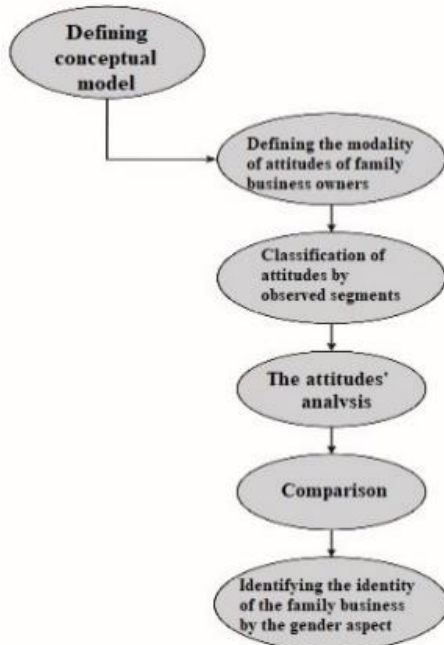


Figure 1. The research framework

The aim of this research is to generate current empirical data on the dimensions of family business owned by men and women in the Republic of Serbia for the purpose of gaining insight into identity. In support of this objective, for conducting this research, the following research questions were defined:

- RQ1 are there differences in the attitudes of men and women towards the goal of starting their own business;
- RQ2 are there differences in the attitudes of men and women regarding the goals and values of the family business;
- RQ3 are there differences in the attitudes of men and women towards the perceived characteristics of a potential heir to the family business; and
- RQ4 are there differences in the attitudes of men and women regarding the causes limiting the growth of the family business.

The goals of a family business are the key drivers of differences in family businesses, and they imply certain advantages on the one hand, and certain disadvantages on the other hand. Family businesses differ considerably in terms of their main goals, which creates certain advantages and disadvantages (Poza, 2007). This is because women are not able to devote themselves to the family business to the extent that men can, as they still have to bear the brunt of family demands and raising children. The way in which the 'gender problem' is framed in the system of family organisation is particularly strategically important, and the understanding of 'gender' as 'women' not only marginalises gender equality as a business goal but also marginalises its links with organisational effectiveness (Charlesworth & Baird, 2007) in the function of long-term sustainable growth. When we consider the race, ethnicity, gender, and class of female family business owners, a wealth of information is revealed about the identity of family firms (Better-Reed & Moore, 2007).

The data was collected through a questionnaire that was sent to owners of family businesses operating in the Republic of Serbia. A copy of the questions can be found in the appendix. The questionnaires were emailed to 125 small and medium business owners (entrepreneurs), and 100 responses were received, resulting in a response rate of 80%. The study attempts to fill a gap in the research literature on family business in the domestic context. For the purposes of this study, owners of enterprises with family participation are defined as owners of an enterprise in which ownership is within the family, and, at the same time, the conditions for the businesses' classification as micro or medium-sized legal entities are met (Accounting Law, 2019). Descriptive statistics methods were used in statistical data processing. The normality of the data distribution of numerical variables was assessed using the Kolmogorov-Smirnov and Shapiro-Wilk tests. In order to compare the obtained results among dif-

ferent groups of respondents, the Mann-Whitney U test and the Kruskal-Wallis H test were applied. The correlation was conducted using Spearman's rank correlation analysis. The limit of statistical significance is determined by the value 0.05. Statistical analysis was carried out with the help of the software package SPSS Statistics for Windows version 26.0.

RESULTS AND DISCUSSION

Based on the results obtained from the survey questionnaires, the respondents are shown according to three criteria (Table 1): (1) according to the size of the company owned (small or medium), (2) according to the gender of the respondent (male or female), and (3) according to the marital status of the respondent (status: single, married; divorced; widower/widow):

Table 1. Data on respondents

	Frequency	%
Company size		
Small	75	75%
Medium	25	25%
Total	100	100%
Gender of respondent		
Male	55	55%
Female	45	45%
Total	100	100%
Marital status of respondents		
Single	29	29%
Married	46	46%
Divorced	17	17%
Widower/widow	8	8%
Total	100	100%

Source: The authors

Of the total research sample, 55% of respondents were male and 45% were female (Table 1). Among the respondents, 75% own small companies, and 25% own medium-sized companies. The largest number of respondents are married, and the smallest number are widowers/widows.

The results of descriptive statistics are presented in Tables 2, 3 and 4. For Tables 2 through 5, the respondents' answers are categorised on a scale of 1 through 5 (from 'least important' to 'critical importance'). A small difference in data variability was observed for the observed segments.

Table 2. Descriptive statistics of the level of agreement of goals to start my own business (questions adapted from Chrisman et al., 1998)

Statements	Min	Max	Mean	Std. Deviation
Being my own boss.	3	5	4.17	0.697
Keeping the family together.	2	5	4.11	0.777
Keeping the property (capital) in the family.	2	5	4.07	0.728
Living in the right, dynamic environment.	2	5	4.16	0.788
Supporting one's own interests in business.	2	5	4.21	0.782
Enjoying a good lifestyle.	3	5	4.20	0.739
Making a lot of money.	2	5	4.06	0.708
Gaining a leadership position in business.	1	5	4.13	0.747
Contributing to our society	1	5	4.02	0.853
Meeting the expectations of others	1	5	3.99	1.059

Source: The authors

The evaluation of the goals for starting a family business, as presented in Table 2, showed the following results: supporting one's own interests in business (AM = 4.21); the desire to enjoy a good lifestyle (AM = 4.20); the intention of becoming one's own boss (AM = 4.17); striving to live in a right, dynamic environment (AM = 4.16); gaining a leadership position in business (AM = 4.13); the intention to keep the family together (AM = 4.11); keeping the property (capital) in the family (AM = 4.07); earning a lot of money (AM = 4.06); contributing to our society (AM = 4.02); and meeting the expectations of others (AM = 3.99).

Based on the results presented in Table 3, the results related to the goals and values related to the family business are as follows: long-term growth of the family business (AM = 4.41); continuous pursuit of business challenges (AM = 4.27); development of a new business as soon as the existing one is realised (AM = 4.18); satisfactory performance of the existing family business and giving priority to personal/family interests in relation to running the business (in both cases, AM = 4.14); the profitability of the business in the short term (AM = 4.11); a predominance of enjoyment at work over earnings (AM = 4.09); inheritance of business by family members if they are interested (AM = 4.07); sale of business with family consent (AM = 4.04); risk as a business challenge (AM = 4.02); and tendency towards a more modest business for easier control (AM = 3.98).

Table 3. Descriptive Statistics of Level of Statements with Business/Different Goals and Values (Statements adapted from Lee & Rogoff., 1996)

Statements	Min	Max	Mean	Std. Deviation
It is crucial that this job remains profitable in the short term, I am not interested in a precise long-term horizon.	1	5	4.11	0.863
I want to continue, so that the business grows in the long run.	3	5	4.41	0.698
Enjoying business is more important than earnings.	1	5	4.09	0.985
This company currently fulfils my target performance.	1	5	4.14	0.778
I would rather that the business is modest and controlled than that it becomes so bulky that I cannot manage it well.	1	5	3.98	0.974
My personal/family interests have priority over job management.	1	5	4.14	0.817
In the end, the business will be sold at the best possible price if it is a family decision.	1	5	4.04	0.953
I enjoy the risk because it represents new business challenges for me.	1	5	4.02	0.825
After having developed this business, I am also planning to develop the next one as soon as possible.	2	5	4.18	0.77
The business will be inherited by family members if they want that.	3	5	4.07	0.624
I am always trying something new in business.	2	5	4.27	0.773

Source: The authors

Looking at the results presented in Table 4, the results of the evaluation of the priority characteristics of potential family business successors are as follows: intelligence (AM = 3.56); commitment to work (AM = 3.55); creativity (AM = 3.52); ability of the potential successor to get along with family members (AM = 3.48); independence and self-confidence (in both cases, AM = 3.45); integrity (AM = 3.44); work experience, acquired financial skills/experience (AM = 3.34); acquired interpersonal skills and acquired skills/experience in strategic planning, and business decision-making ability/experience (AM = 3.42); external management experience, acquired marketing and sales skills and existing ownership stake in the company (AM = 3.40); acquired technical skills and experience, trust in other family members (AM = 3.37); compatibility of goals with the current general manager (AM = 3.35); reported performance so far (AM = 3.34); blood relationship, personal relationship with the CEO (AM = 3.27); level of education (AM = 3.21); respect from uninvolved family members (AM = 3.2); age (AM = 3.19); and gender (AM = 3.1).

Table 4. Descriptive statistics of desirable characteristics of potential successors (questions adapted from Chrisman et al., 1998)

Questions	Min	Max	Mean	Std. Deviation
Age	1	5	3.19	1.221
Gender	1	5	3.1	0.882
Education level	1	5	3.21	0.946
Experience in the business	1	5	3.43	1.103
External management experience	2	5	3.4	1.034
Reported performance so far	1	5	3.34	0.912
Acquired financial skills/experience	1	5	3.43	1.056
Acquired marketing and sales skills/experience	1	5	3.4	0.995
Acquired interpersonal skills	1	5	3.42	0.976
Acquired technical skills/experience	1	5	3.37	0.949
Acquired skills/experience in strategic planning	1	5	3.42	0.986
Business decision-making skills/experience	1	5	3.42	1.017
Compatibility of goals with current CEO	1	5	3.35	1.018
Blood relation	1	5	3.27	0.889
Current ownership stake in the family business	1	5	3.4	0.943
Job commitment	2	5	3.55	1.038
Integrity	2	5	3.44	0.988
Intelligence	1	5	3.56	1.012
Creativity	2	5	3.52	0.989
Willingness to take business risk	1	5	3.39	1.033
Independence	2	5	3.45	1.018
Self-confidence	1	5	3.45	1.048
Ability to get along with family members	1	5	3.48	1.078
Personal relationship with current CEO	1	5	3.27	1.033
Trust in family members	1	5	3.37	1.021
Respect from actively involved family members	1	5	3.39	1.053
Respect from uninvolved family members	1	5	3.2	1.005
Respect from employees	1	5	3.39	1.136

Source: The authors

Based on the results of the respondents' statements presented in Table 5, it can be seen that among the key causes impeding the growth of the family business are the following: limited capital (AM = 4.15); business maturity (AM = 4.14); different goals and values (AM = 4.06); entrepreneurial inflexibility (AM = 3.99); maladjusted successors (AM = 3.9); and sibling conflict (AM = 3.85). Business failure typically involves shutdown or bankruptcy, regardless of whether it is voluntary or initiated by creditors (Revilla et al., 2016). The relationships between family involvement and business goals are very complex. This is reinforced by the fact that the symptoms of family business addiction are similar to those of chemical addiction.

Table 5. Descriptive statistics of the causes that affect the family business not growing

	Min	Max	Mean	Std. Deviation	Median	Modus
Business maturity	1	5	4.14	0.792	3	3
Limited available capital	2	5	4.15	0.809	4	4
Maladjusted successors	2	5	3.9	0.759	4	4
Expressed entrepreneurial inflexibility	2	5	3.99	0.785	4	4
Sibling conflict	1	5	3.85	1.029	4	4
Different adopted goals and values	1	5	4.06	0.874	4	4

Source: The authors

By applying the Mann-Whitney U test, it was determined that there are no statistically significant differences in the difference between the goals/values of male respondents (Md = 4.18, n = 55) and female respondents (Md = 4.27, n = 45) – $U = 1075$, $z = -1.131$, $p = 0.258$, and $r = 0.11$, which answers the first research question. Furthermore, according to the responses to the third research statement, it was determined that there are no statistically significant differences in the attitudes of male respondents (Md = 3.57) and female respondents (Md = 3.21) when it comes to the characteristics of the future business successor ($U = 977$, $z = -1.802$, $p = 0.072$, $r = 0.18$). On the other hand, the aforementioned test determined the existence of a statistically significant difference in attitudes between male and female respondents regarding the goals of starting a business (second research question), as well as regarding barriers to business development (fourth research question). Thus, it was established that there is a statistically significant difference in attitudes towards the goals of starting a business for men (Md = 4.10, n = 55) and women (Md = 4.50, n = 45), although this difference is of low intensity ($U = 937$, $z = -2.092$, $p = 0.036$, $r = 0.21$). The Mann-Whitney U test revealed the existence of a statistically significant difference in opinions about the barriers to business growth for men (Md = 3.83, n = 55) and women (Md = 4.18, n = 45), and this difference is of medium intensity ($U = 816$; $z = -3.015$, $p = 0.003$, $r = 0.30$).

Based on all of the above, a systematisation of the differences between men and women regarding the understanding of the characteristics of the company's identity was made (Table 6).

Table 6. Systematization of the results of differences in attitudes between male and female respondents

There are no statistically significant differences	Statistically significant differences of low intensity	Statistically significant differences of medium intensity
Goals/values of family business	Starting up a business	Barriers to business growth
Characteristics of the future business successor	-	-

Source: The authors

As can be seen from the previous presentation, it was determined that there are statistically significant differences in the attitudes of male and female respondents regarding the goals of starting a business and barriers to business growth, while this is not the case in terms of defining the goals/values of family business and the characteristics of the future successor.

Table 7. Comparison of questionnaire’s total scores among different groups of respondents

	Comparison by legal form of business organization (p)*	Comparison by gender of respondents (p)*	Comparison by marital status of respondents (p)**
The level of clarity of the existence of goals for starting your own business	0.090	0.036 (F>M)	0.629
The level of clarity of the existence of goals and values of importance in business	0.669	0.258	0.589
The level of agreement with the existence of the influence of desirable characteristics on the quality of potential heirs	0.457	0.075	0.778
The level of agreement with the existence of causes that negatively affect the growth of the family business	0.663	0.003 (F>M)	0.336

Source: The authors

Note: * Mann-Whitney U test, ** Kruskal-Wallis H test, p - level of statistical significance

Statistically significant differences were obtained in the case of comparing groups of respondents by gender only regarding the level of agreement in determining the goals for starting one’s own business and the level of agreement with the existence of causes that negatively affect

the growth of the family business. Females had a statistically significantly higher level of agreement on defining goals that affect starting their own business ($p = 0.036$), as well as a statistically significantly higher level of agreement with the existence of causes that negatively affect the growth of the family business compared to males ($p = 0.003$).

Table 8. Spearman's correlation of the total scores of the questionnaire

	The level of clarity of having goals for starting your own business (r)	The level of clarity of the existence of goals and values of importance in business (r)	The level of agreement with the existence of the influence of desirable characteristics on the quality of potential successors (r)	The level of agreement with the existence of causes that negatively affect the growth of the family business (r)
The level of clarity of having goals for starting your own business (r)	1			
The level of clarity of the existence of goals and values of importance in business (r)	0.416**	1		
The level of agreement with the existence of the influence of desirable characteristics on the quality of potential successors (r)	-0.033	-0.237*	1	
The level of agreement with the existence of causes that negatively affect the growth of the family business (r)	0.437**	0.322**	-0.006	1

Source: The authors

Note: * $p \leq 0.05$, ** $p \leq 0.01$, r – the correlation coefficient

Using Spearman's correlation test, it was observed that, among the respondents, a higher degree of agreement on the issue of defining goals for starting one's own business statistically highly significantly positively correlates with the level of clarity of the existence of goals and values that are important in business, and the level of agreement with the existence of causes that negatively affect the growth of the family business. In other words, with the increase in the level of agreement among respondents regarding the definition of goals for starting their own business, the level of agreement also increased when it comes to seeing the goals and values that are important in business, and when it comes to the level of agreement with the existence of causes that negatively affect the growth of the family business. In addition, it was observed that the level of agreement regarding the existence of goals and values of importance in business is statistically significantly negatively correlated with the level of agreement with the existence of the influence of desirable characteristics on the quality of potential successors, and statistically significantly positively correlated with the level of agreement with the existence of causes that negatively affect the growth of the family business. In other words, with the increase in the level of agreement among respondents regarding the existence of goals and values that are important in business, the level of agreement with the existence of the influence of desirable characteristics on the quality of potential successors decreased, and the level of agreement with the existence of causes that negatively affect the growth of the family business increased. The observed similarities indicated the determinants of the identity of family businesses.

CONCLUSION

In the long term, future research will be able to develop a general business model of a family business. A person's gender can have a significant impact on his/her personality, as well as on behavioural characteristics, which will also affect the management of a family business and business decision-making. Therefore, when designing the business model of family businesses, it is important that attention also be paid to the systematic differences of the family line.

Future research should explore these questions in more depth and detail. The sample of this study is not representative of all family businesses. Therefore, in future research, the matter of which conditions in family businesses lead to positive and negative results in the function of creating an adequate identity of family businesses can be investigated. The results can, to a certain extent, direct practitioners to critical issues in this area.

One of the limitations of this research is the fact that, in the Republic of Serbia, there is no official, publicly available database on which

companies can be classified as family-owned, for which the prerequisite is the definition of criteria for their inclusion in this group. The sampling criteria and research methods used in the research have certain limitations that should be highlighted. First, to what extent we can suggest that there are differences between respondents according to gender when the knowledge does not derive from identical research strategies is debatable. Second, it is necessary to highlight the defined criteria for classifying family businesses, which is not generally accepted.

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ИДЕНТИТЕТ ПОРОДИЧНИХ ПРЕДУЗЕЋА ИЗ ВИЗУРЕ ВЛАСНИКА ПРЕМА РОДНОМ КРИТЕРИЈУМУ И ЊИХОВА ДРУШТВЕНА УЛОГА

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Резиме

Оснивање и пословање породичних предузећа пролематика је која је увек актуелна и недовољно истражена. Овај чланак даје преглед литературе о породичном бизнису из перспективе дизајнирања идентитета породичног бизниса и утврђивања разлике према родном критерију ради јаснијег сагледавања потенцијала ове врсте бизниса. Питања као што су, дефинисање циљева покретања сопственог бизниса, одређивање циљева и вредности породичног бизниса, перцепиране карактеристике потенцијалног наследника породичног бизниса и идентификовање узрока ограничавања раста породичног бизниса су важне одреднице које утичу на разумевање идентитета породичног бизниса.

Генерално, овом литературом доминирају дескриптивни чланци који се обично фокусирају на анализу функционалних веза у оквиру породичног предузећа и како породично власништво генерише или уништава вредност. Како истраживачи, тако и практичари су подједнако покушавали да одговоре током последњих деценија. Упркос обилу теоријских аргумената и емпиријских доказа о овим темама, још увек недостаје свеобухватна перспектива стварања идентитета породичних предузећа. Даље, литература се не бави довољно тиме како се породични бизнис покреће и дизајнира према родном критеријуму. Узимајући у обзир дефинисане сегменте истраживања, истичемо нови поглед на реализацију породичног бизниса, укључујући и питање наследника, за истраживање породичног предузећа. Такође идентификујемо нека од кључних питања и празнина које би требало истражити у будућим студијама ако истраживање жели да допринесе побољшању праксе управљања пословањем породичних фирми.

Намера овог рада је да подстакне даљу дискусију међу научницима, власницима породичних фирми и другим интересним групама о начинима на који се покреће породични бизнис и ствара идентитет ове врсте пословања према родном критеријуму. Такође имамо за циљ да подигнемо свест о важности родног критеријума за сагледа-

вање специфичности породичних фирми, наглашавајући на тај начин критичну потребу за интегрисаном перспективом породичних фирми, која би укључила, поред осталог, и често занемарен критеријум, родни кодне уместо да само осветљавамо одабране ставке по сегментима евалуације и доносимо пренагљене закључке на основу уског скупа информација.

INNOVATIVENESS AND MODERN TRENDS IN HIGHER-EDUCATIONAL INSTITUTIONS AND LIBRARIES AS UNITS OF THEIR STRUCTURE

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Abstract

Innovations are present in all fields of human activity. Therefore, they are an indispensable segment of the activities of higher-educational institutions which are going through a very demanding process of development towards future forms of educational, scientific and research work. Higher education activities imply a continuous monitoring of innovations, and their application in the educational process. The aforementioned activities are also related to the academic library, which is an unavoidable factor in the process of carrying out scientific and educational work, and is, unlike the public library, closely related to innovative processes in education and the performance of scientific activities. Using innovative methods and solutions, along with transformational processes, the library must satisfy its users with knowledgeable staff, who are ready to answer questions and meet the challenges of increasingly demanding modern users. For this reason, employees in higher education libraries are obliged to continuously improve their level of education, and to constantly keep up with modern trends, with a particular emphasis on respecting what is prescribed by the principles of the code of ethics and the legal regulations in the field of library work, as well as in the field of activities of higher-educational institutions and the protection of intellectual property. In order for this entire process to be implemented, the management of these institutions must invest all their effort and knowledge into reaching their goals through efficient organisation and a strategy that will lead to a high quality of service and a competitive advantage in this market.

Key words: innovations, higher education, library, competitiveness, management

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ИНОВАТИВНОСТ И САВРЕМЕНИ ТРЕНДОВИ У ВИСОКООБРАЗОВНИМ ИНСТИТУЦИЈАМА И БИБЛИОТЕКАМА КАО ЈЕДИНИЦАМА У ЊИХОВОМ САСТАВУ

Апстракт

Иновације су данас присутне у свим сферама људског деловања и рада, па су стога незаобилазан сегмент и високог образовања, односно високошколских институција, које пролазе тежак и веома захтеван развојни пут према будућим облицима бављења образовним, научним и истраживачким радом. У високом образовању се подразумевају континуирано праћење иновација и њихова примена у образовном процесу, који се састоји од уочавања промена, развоја организације, креирања иновација и њених имплементација. Све ове активности везане су и за академску, односно високошколску библиотеку, која је незаобилазни фактор у процесу обављања научног и образовног рада и која је, за разлику од народне, односно јавне библиотеке, уско повезана са иновативним процесима у образовању, али и са обављањем научне делатности. Заједно са трансформационим процесима, користећи иновативне методе и решења, библиотека мора да задовољи корисника и виспреним људством, које је спремно да да одговоре на сва питања, те да одговори на изазове све захтевнијих савремених корисника. Из тог разлога, нарочито поштујући оно што је прописано принципима етичког кодекса и законском регулативом из области библиотечног рада, рада високошколских институција и заштите интелектуалне својине, запослени у високошколским библиотекама обавезни су да непрестано буду у кораку са савременим трендовима и да се континуирано и перманентно едукују. Да би овај целокупан процес био спроведен, менаџмент ових институција мора, поштујући принципе научног менаџмента, уложити сав свој напор и знање у добру организацију и стратегију, не би ли се досегли циљеви који ће довести до високог квалитета услуге, а самим тим и до конкурентске предности на овом тржишту.

Кључне речи: иновације, високо образовање, библиотека, конкурентност, менаџмент

INTRODUCTION

This paper will deal with innovative processes in higher-educational institutions through all segments and principles of scientific management, with special reference to libraries, which are their integral part and a very important link in the process of acquiring and providing knowledge. Therefore, this paper is based on the following views:

- Investments in education have a longer payback period, but their effects are manifold, and multiplied through all areas of social activity;
- Changes that are rapidly accelerating are forcing all market actors to systematically approach their monitoring so as to be able to adequately react to them;
- The imperative of a higher-educational institution is competitive positioning in the education market through the application

of continuous innovation in creating a marketing strategy, while providing the expected level of customer service which is in accordance with the needs of society;

- Managing innovation in higher education should be approached from a strategic level in order to create an organisational culture which is flexible and capable of all kinds of change;
- The application of marketing management based on innovations enables the quality of the system of higher education to be raised. The promotion of higher-educational institutions implemented through modern promotional channels significantly contributes to creating a more positive image for an institution by clearly sending the target group the message that the higher-educational institution is capable of responding to the challenges of the future;
- Competitive advantage is increasingly based on the realisation and monitoring of the preferences of service users, and their satisfaction through the innovation of the teaching process;
- By breaking down the time and space barriers, information technologies provide tremendous opportunities for the improvement of services in higher education;
- All these activities are best reflected in the teaching process, as well as in the work and organisation of the library, which should provide all the information related to the performance of scientific activities and ensure an unhindered teaching process.

The degree of education, the ability to adapt to the daily changes occurring at a time of technical-technological development, and the expansion of information technologies are an unavoidable indicator of the level of social development achieved in every social community. Acquiring a formal and informal education, and mastering a wide range of different skills enables an individual to better perform complex and responsible jobs in modern society, resulting in a better position on the social and professional ladder. The innovations that we encounter, even though they may seem too complicated at first glance, accelerate the flow of information and actually enable us to carry out everyday activities more easily. Thus, an individual is capable of responding to all the challenges they encounter faster and better. By noticing the necessity for innovation through the aforementioned prism, and starting from the fact that technological competitiveness and innovativeness have become the key determinants of success, we get better and more effective work results, and we are more efficient in the processes of learning and coming up with new ideas, with the goal of realising them.

Change management is considered to be one of the basic functions of modern management, with the aim of identifying directions of devel-

opment which optimally establish the correlation with changes in the business environment.

New innovation models must take into account the basic relation of strategic innovation management, which connects the capabilities of higher-educational institutions and the possibilities of the environment – the market, through strategy as an indirect guiding force for achieving the goal of effectiveness and, by extension, business development.

All the previously mentioned influences on modern society contribute to the fact that higher-educational institutions are faced with a series of difficulties and limitations, which may reach so far as to threaten their survival. In order to deal with all the obstacles and challenges imposed on them, partly through legal regulations and partly through the growing demands of modern users, the management of these institutions is forced to give quick and efficient answers, to find effective ways of following modern trends, and to modernise the conditions and ways of performing work by introducing modern innovative solutions to all sectors of an organisation. This task is by no means easy, because there is currently a deficit of intellectual potential in the workforce on the market, as well as a lack of financial power, which further complicates this problem. In order for a higher-educational institution to be able to compete on the market with educated staff, who must not lag behind staff educated and trained in other institutions in the world, it must implement innovative processes through all segments of its organisation. This will probably mostly concern the teaching process, scientific work, the qualifications of staff, and, inevitably, libraries which must be staffed to respond to the needs of all actors in the educational-scientific process. Therefore, in order to take a closer look at this issue and try to reach certain conclusions, we should first look at the concept of innovation itself, at models of innovative organisations based on knowledge, and at the possibility of their implementation.

INNOVATIONS IN THE “NEW AGE”

The beginnings of the development of innovation theory in the first half of the last century are connected with the analysis of J. A. Schumpeter, who identified innovation as a basic factor of technological progress and economic development, in terms of replacing old technologies with new ones, which Schumpeter called *creative destruction*. This syntagm refers to the process in which the basic impulse, which sets the capitalist system in motion and keeps it moving, leads to new consumer goods, methods of production or transportation, and new markets and forms of industrial organisation which are created by capitalist enterprises.

The term innovation comes from the Latin word *innovatio*, which denotes a new invention that improves a product or work method; addi-

tionally, the term denotes novelty, newness, and change. (Klajn & Šipka, 2006, p. 516) Innovation is the application of a new and improved idea, procedure, good, service, or process, which brings new benefits, new values, or quality in application. This term can denote:

- a *product* – innovation as a product or service that has market verification; and
- a *process* – innovation as an innovative process from idea to realisation, i.e. from idea generation to implementation.

All of the above leads us to the realisation that innovation is nothing more than the transformation of ideas into new organisational systems, a new approach to services, or new or improved technological processes or products with market entry. New ideas can also refer to a new or improved product or service, and to the way in which the product or service is delivered. As Williams et al. (2010) explain:

Any means with the help of which entrepreneurs can profit, thanks to the possibilities that are hidden in the changes in the environment, are innovations. They are preceded by inventions, and they are actually applied inventions. Innovations can be directly applied by entrepreneurs, in production or in any other field of human activity.

(Williams et al., 2010, pp. 391-412)

Being innovative does not only mean developing a new high-tech product. For many organisations, innovation is the management process of systematically exploiting new ideas in order to gain a competitive advantage. For all the aforementioned reasons, it is evident that investing in knowledge and innovation means investing in the future. Thus, it is important to consider the innovative processes related to the educational process, primarily those which are applied in the educational process of higher-educational institutions and all its organisational parts. It is important to regard them as sensitive organisations that, through innovation and by following innovative trends, create new innovations and a basis for an easier future.

Innovativeness is the ability to transform existing ideas into useful new forms or combinations that differ from their original form to such an extent that they appear new. This enables the achievement of development goals as completely new things, and ensures the use of scientific and technological results and potentials. The concept and process of harmonising goals are valid only if they are performed on a clearly defined structure and hierarchy of strategy. In today's complex conditions, the role of *innovation and development* is twofold. Innovativeness is characterised by the need to reinforce the multiplication of ideas on the one hand, and the need to transform them into technological innovations on the other hand. Using the benefits of information technologies contributes

to an accelerated increase in productivity and, unlike previous technologies, affects globalisation by strengthening real and financial ties. On the other hand, it not only encourages product turnover but also creates IT products of great market value. What is important about information technologies is the effect of knowledge on knowledge itself, as the main source of productivity, while innovativeness contributes to providing adequate qualifications for performing certain jobs in the economy and society (Williams & McGuire, 2010, pp. 391-412). The best way to approach this problem is to base it on the thesis that innovation is initiated by wisdom. In that sense, innovation is seen as an extremely complex issue, because it does not always fit into the social context, and because every innovation creates completely new living conditions.

Important activities that define an innovative organisation are systematic problem solving based on the application of scientific methods, experimentation with new knowledge and approaches, learning from one's own experience, as well as the experience of others, and the efficient transfer of knowledge throughout the entire organisational structure.

KNOWLEDGE AND INNOVATION MANAGEMENT IN A HIGHER-EDUCATIONAL INSTITUTION

A modern organisation based on know-how knowledge and innovations is one that learns, acquires competencies, and acts in the best possible way based on information and available scientific achievements. The global spread of innovative activities is a consequence of the organisation's need for new knowledge and skills. The biggest problems in knowledge management in innovative organisations are balancing between the knowledge possessed by the individual and the collective knowledge of an organisation or team, and harmonising the relationship between theoretical knowledge and applied knowledge. Knowledge integration is a process in which individuals share and combine the information gathered to collectively create new knowledge. Knowledge integration is important in the context of innovative project teams, and crucial in innovation processes.

Learning organisations are the ones that have the best chance of success and progress in the future. In such organisations, people continuously expand their capacities to create the results they want, new and expansive ideas are nurtured, collective aspirations develop, and people constantly practice how to learn together. The permanent need for highly qualified, independent and trained staff, and the necessity for requalification and additional qualification, broaden the field of business activities and the application of knowledge and education. The degree of investment in knowledge and education is becoming an increasingly crucial indicator of the understanding of modern business management tendencies, and a prerequisite for realising competitive advantages on the entire market.

Terms denoting concepts such as ‘learning organisation’, ‘innovative organisation’, ‘knowledge creating company’, or ‘knowledge-based organisation’ are terms which are increasingly used in contemporary literature dealing with the field of change management in organisations, and which, in the most vivid way, express the attitudes of the most successful modern organisations and their managers towards the knowledge and education of all employees. Interest in the study of learning organisations is mentioned in the economic literature of the late 1980s, and it is the result of the realisation that learning is necessary for gaining and developing competitive advantages.

Knowledge used to be associated with personality, while nowadays it is associated with work, because knowledge has also become a resource. According to the current criteria, knowledge is a public good. Initially, it was applied to process tools and products, which were the basis of the Industrial Revolution. The goal of a modern organisation is to view all business processes as knowledge processes, which includes the creation of knowledge, its dissemination, and its upgrading and application throughout the organisation. Modern organisations are finding ways to create added value through identifying, applying, and using knowledge in a unique way, and that is a process based partially on science, partially on skill, and partially on pure luck. Modern organisations, and managers in those organisations, should strive to create as much explicit knowledge, collective in nature, as possible. Such knowledge, implemented through operations, cannot disappear in the way an individual can leave an organisation. What the knowledge management system will look like, that is, how it will be established and how it will function, depends on the specific situation in which the organisation finds itself.

Knowledge management models are numerous and diverse, and one of the basic ones consists of four interrelated phases:

1. knowledge creation, which refers to the input of new knowledge into the organisation, and includes the sub-phases of discovery, collection and development of new knowledge;
2. storage of knowledge, which represents a set of activities related to the proper storage of collected knowledge and its preservation within the system;
3. knowledge transfer, which refers to the activities of knowledge transfer between parts of the organisation and individuals, such as communication, translation, conversion and knowledge filtering; and
4. the use of knowledge, which is characterised by activities related to the practical application of acquired knowledge in everyday business.

In institutions and educational organisations, higher-educational and other institutions, management has the task of making available all the resources and capacities of an organisation to the users of its services in a maximum way, using a good business strategy and good management.

Encouraging the innovativeness of employees implies the management's ability to create the ambiance suitable for the creation of innovations and the adequate evaluation of employees for achieved successes. In other words, it implies the managers' ability to create an appropriate innovative culture in the organisation. An innovative organisational culture is characterised by the belief in innovations and ideas, marketing orientation, teamwork, loyalty to the organisation, readiness to take risks, and a high sense of responsibility.

The effective management of organisational knowledge requires five elements, namely: paying attention to permanent learning; combining knowledge and experience; sharing existing organisational knowledge, mutual cooperation and communication; availability of information; and use and development of existing knowledge. The survival of organisations and individuals in an uncertain and changing environment depends, above all, on their ability to learn.

THE ACADEMIC LIBRARY AS SUPPORT TO THE TEACHING PROCESS AND DISTANCE LEARNING

All ideas, as well as all changes, make sense and become acceptable only if everyone involved in the processes has a part in them. In particular, this refers to the introduction and implementation of innovative processes, which are, in higher-educational institutions, especially applied and reflected in their libraries and in the teaching-scientific process. Therefore, special support should be given to libraries, which are the starting point of the teaching-scientific process, and in which new technological services, their use and application, and the human factor as the basis of a good flow of information, are interwoven. They function in such a way that they should be a centre for the exchange and collection of precisely this information, but at a high scientific and ethical level. The ethical level must be maintained as a prerequisite for the correctness of scientific work and research, and it is reflected, above all, in the respect of all laws and regulations that define the area of copyright, the moral principles of correct citation of scientific texts, the respect for other people's intellectual effort, and the fair use of already established scientific information.

Respecting all of the above, which is mainly the responsibility of the library and its employees, the library becomes the focal point of the environment in the academic profession, and it can be valuable for the students and the entire academic staff for this reason. It should be a meeting point for all the needs of intellectual work, especially as concerns the

planning and implementation of teaching programmes, making decisions about enriching the library collection, introducing innovative technical and informational activities, exchanging and determining relevant information, and referring students to the verified and valid information necessary for acquiring new knowledge and skills, as well as information about the subjects of their interest and research. Therefore, certain equipment and technical capabilities, as well as the training of employees, help make knowledge available to everyone and ensure that knowledge is used in the right way. The modern library provides special support to the teaching process by referring users to electronic resources. As a support for distance learning, although it seems almost impossible to us, it has had a long development path.

With Gutenberg's invention of the movable-type printing press, the processes of the technological revolution began, and it is in this invention that we find the beginnings of today's distance learning. Although it seems a bit odd, Gutenberg's invention made it possible to print books and distribute them widely. Therefore, the possibility of distance learning was created, because this is how knowledge was multiplied and transported to the user. Although it underwent a series of transformations during the 19th century and the Industrial Revolution, and another series of transformations later on in the 21st century in the era of high-tech revolution, digitalisation, the Internet, and IT sciences, this concept has not been abandoned to this day, because it only facilitates the distance learning process and enables maximum benefits with as little investment as possible. This is because new technologies not only change but also facilitate ways of working in all social spheres.

As Nedić et al. (2018) explain:

The impact of information and communication technologies (ICT) on people's lives far exceeds their effect on productivity growth. They act as a vector of economic growth and development, but also far more broadly, as a vector of transformation of society as a whole. ICTs can improve access to basic services and create new employment opportunities. They have significant potential to improve people's quality of life and fundamentally change the way they communicate with each other.

(Nedić et al., 2018)

Therefore, both in higher-educational institutions and in libraries, innovative processes are of great importance for the institution. But if we focus only on libraries, it is obvious to us that every higher education library must have a certain number of scientific and professional publications, and other library materials that are necessary both for engaging in scientific activity and for engaging in the educational process. Therefore, as an important link in that process, libraries, together with the institutions of which they are part, are forced to go through a process of trans-

formation and innovation via the influence of information and communication technologies, so as to become InDoc centres with a wide range of materials, either conventional or electronic, which can fulfil the needs of its users – researchers, lecturers and students.

Zlatanović et al. (2020) note that:

A knowledge-based system that implies a strategic approach to innovation with intensive cooperation of the Higher Education Institution with external stakeholders, new models of organizational structures, innovative organizational culture, continuous training and development of employees in the Higher Education Institution, as well as greater participation of students in decision-making and production, which contributes to the improvement of innovativeness and efficiency of higher education institutions as the basis of sustainable development.

(Zlatanović et al., 2020)

In all of this, libraries have been transformed and adapted to contemporary trends through centres for collecting and systematising information which librarians, with all the necessary support, provide to their users. These transformations are particularly reflected in higher education libraries, because they must be an unavoidable factor in education, science, and the process of acquiring knowledge. For this reason, one of the basic tasks of higher education libraries is to teach users to search for information and to learn, as well as to use the electronic, digital, and virtual libraries of the 21st century in addition to traditional forms, as we mentioned previously. As Vraneš (2004) explains:

With the inclusion of new media in library collections, emerged a need to harmonize terminology, therefore, the terms media library, phono library, photo library, and even hybrid library were used. We are witnessing a similar process nowadays in the English language, in which the phrase ‘teaching library’ is closely followed by the term ‘teaching cybray’, currently untranslatable into Serbian, which denotes both teaching for the use of information technology and the use of information technology in teaching. Not only terminologically, but also essentially, this process was started at the University of Southern California in 1994, following a different approach to the understanding of the role of the library with the new distribution of space. Namely, the space where students, teaching and library staff can communicate with each other with the help of modern computer equipment, the latest software and technical support staff is twice as large as the library's warehouse space. All this has a stimulating effect on the introduction of innovations in the teaching itself, and the library serves as an experimental training ground.

(Vraneš, 2004, pp. 222-223)

CONCLUSION

Innovations in the academic library are primarily reflected in the broadening of the information database available via the global network, and in the digitalisation of the scientific material owned by the library and its placement in virtual space. This means that the library uses the resources of other libraries, while making its resources available to others. This is primarily visible in the expedient organisation of library consortia, which, through association, enables access to interested users for whom it is thus easier to search for information in expansive databases such as IDEAL (International Digital Electronic Access Library), EBSCO, which has a large number of journals in its database, Thompson abstract-citation database, and the like.

The process of the association of libraries has its own history, which started in 1967 when OCLC (Online Computer Library Center) was organised, followed by the CORC (Collaborative Online Resource Catalogue), the centre for the organisation of websites and other digital resources, the RLG (Research Library Group) and RLIN (Research Library Information Network), which were created in the 1970s. In 1997, a new global library consortium, ICOLC (International Coalition of Library Consortia), was formed, and it had the same goals as its predecessors.

Such platforms, through the association of libraries, exceed the boundaries of space bounded by walls, expand into virtual space, and enable the exchange of information on a global level. All these consortia and pooling of information are innovative processes of the modern age, which on a global level “instead of offering unverified and short-lived information from the Internet, post reliable, accepted and valued texts, through the reading of which it is possible to enter the world of knowledge” (Vraneš, 2004, p. 223).

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ИНОВАТИВНОСТ И САВРЕМЕНИ ТРЕНДОВИ У ВИСОКООБРАЗОВНИМ ИНСТИТУЦИЈАМА И БИБЛИОТЕКАМА КАО ЈЕДИНИЦАМА У ЊИХОВОМ САСТАВУ

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Резиме

Савремено доба, ера дигитализације, информатичка ера, или данас популарно названа „Њу Еџ“ ера, донела нам је низ промена које су се дешавале убрзано и које су биле тешко прихватане, али које су захватиле све сфере друштвеног деловања. Како би се максимално искористили позитивни ефекти иновација, особље запослено у свим организацијама било је, и данас наставља бити принуђено и упућено на перманентно образовање, како би било кадро да одговори савременим начинима рада. Кроз призму иновација сагледавамо све друштвене процесе и односе, а њиховом применом долазимо до олакшавања процеса рада и достизања конкурентске предности на пољу деловања. Ови процеси нису заобишли ни високошколске институције, као најосетљивији део људске делатности, јер управо су оне иницијална каписла људског развоја и развоја знања, а самим тим и боље будућности. Руководство ових установа има велики задатак да, користећи сва знања и вештине савременог менаџмента, добром стратегијом и организацијом правовремено одговори на све изазове и промене које се дешавају. Будући да је оваква институција спој одељења која интерактивно делују и чије је деловање, иако наизглед различито, међусобно уско повезано, добра организација људских ресурса је један од задатака руководства установе. Увођење иновација у ове установе огледа се, на пример, у организовању наставе на даљину, што је уско повезано са функционисањем наставног особља које мора

добро да влада начинima organizovanja naučnih informacija, da bude spremno da organizuje nastavu na daljinu, i da bude obučeno da koristi savremene tehnologije. Iz ovog razloga smo upućeni na činjenicu da je ovaj inovativni proces skoro pa nemoguće postići i sprovesti bez usmerenosti na biblioteku, koja se nalazi u sastavu visokoškolske ustanove i koja može da da smernice za obavljanje ovog procesa. Ove smernice ogledaju se u ljudstvu, koje je vispreno u svojoj radu i u mogućnosti da da pravovremene odgovore na postavljene zadatke. Biblioteka akademskog nivoa mora da ide u korak s tehničko-tehnoškim zahtevima, a bibliotekari zaposleni u ovim bibliotekama moraju biti spremni da, koristeći sve blagodeti savremenog poslovanja, daju i pruže pravovremene i proverene informacije, te da upute na baze podataka koje su organizovane na globalnom nivou. Ovo je moguće samo ukoliko bibliotekari inovativno pristupaju poslovanju. Udružujući se u konzorcijume, biblioteke omogućavaju da informacije i znanje budu dostupni svima, što je svakako osnovni cilj obrazovnog i naučnog procesa. Takođe, prateći proces digitalizacije, one omogućavaju i da informacije koje one poseduju budu dostupne širem krugu korisnika, a upućivanjem na princip etičnosti prezentuju fer i korektno iskorišćavanje do sada stечених знања, koja se koriste za стицање нових. Из тог разлога, сви актери овог процеса морају деловати синхронизовано, подржавати једни друге, размишљати иновативно и тежити променама.

Stoga možemo zaključiti da su edukativne organizacije zasnovane na znanju svrha i cilj budućeg razvoja društvene zajednice. Kako bismo ovaj cilj postigli, moramo ići u korak sa svim blagodatima koje nam stoje na raspolaganju.

SOLIDARITY AS A LEGAL VALUE

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Abstract

Solidarity as a social and legal value has a special place in the development of every legal order, because it fits into its *de facto* framework. In terms of this factual aspect, solidarity also entails the behaviour of people, which is based not only on legal norms but also on a plethora of social norms. Thus, it may be assumed that solidarity is a genuine expression of the moral value of perceiving others as oneself, i.e. developing the concept of brotherhood. Such a conceptual framework of solidarity indicates its future application and incorporation into legal systems, particularly those aspiring to longevity which will not be sustained by a highly centralised structure, but by stronger pillars, one of which is solidarity. Throughout the course of history, the concept of solidarity has had different features and boundaries. At times, its application was highly disputable, but it has not affected the substance of this moral value because it is a categorical imperative. The very fact that it is a universal (unconditional) moral value rather than a designated (goal-driven) endeavour enables people to accept or to reject it. Such a concept of solidarity gives birth to a value-based social and legal order, based on social justice and care for others, which are accomplished through social welfare legislation.

Key words: solidarity, value, brotherhood, charity, social security, pension and disability insurance

СОЛИДАРНОСТ КАО ПРАВНА ВРЕДНОСТ

Апстракт

Солидарност као друштвена, а потом и правна вредност заузима посебно место у развоју сваког правног поретка, јер се и уклапа у његов фактички елемент. У својству фактичког елемента она и означава понашање људи, али сада не само по правним, већ и по различитим облицима друштвених норми. Тако је могуће претпоставити да је солидарност искрени израз моралне вредности посматрања другог као себе, односно развијања појма братства. Та и таква основа солидарности говори о њеној будућој примени и уградњи у правне поретке, особито оне који пледирају на дуготрајност, јер њих неће одржати високо изграђена централизованост, већ чвршћи стубови од којих је један и сама солидарност. Наравно,

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током историје је овај појам добијао различите обресе и био примењен понекад и на веома проблематичан начин, али то није изменило суштину ове вредности, јер је она дата. Баш то што је дата, а не задата, и омогућава њено прихватање и одбијање, те рађање друштвеног и правног поретка заснованог на вредностима попут социјалне правде и бриге за друге, до којих и долази кроз социјално законодавство.

Кључне речи: солидарност, вредности, брат, сигурност, добротинство

INTRODUCTION

Solidarity is a value which is absolutely necessary for social functioning. As such, it has grown into one of the most important pillars of social and legal order. Moreover, solidarity has become a means for society to fulfil its purpose of continuous progress, which is accompanied by care for others. Naturally, the concept of looking after others implies numerous potential ambiguities which may compromise the concept of solidarity. However, this does not mean that we should abandon the idea of looking after others.

As a value, solidarity may be based on the way we see others, regardless of whether or not this coincides with the way we see ourselves. The concept of 'others' is crucial for the development of legal and social values, such as solidarity, since 'others' and the status they have in our perception reveal our true care for the community.

The concept of a 'brother' and the way we see others are ideas which have developed throughout history, i.e. simultaneously with, or even before, the development of solidarity as a concept. Does belonging to a community, even to a general social community, imply any commitments?

Of course, even solidarity as a social value requires some form of legal protection, since social reality needs to obtain a legal attire which will safeguard social values by means of legal norms of social welfare legislation. This partially compromises the honesty of the procedure which implies solidarity, but it has become a necessity due to the possible abuse and misrepresentation of true values.

Solidarity, that is, 'the practice of solidarity' has become necessary, since moral character does not belong to society and the state by itself, and since it is not something that others need not fight for. Therefore, society, and then the state, will gain full valuable meaning only if one abandons egotism and shifts to 'observing' others the way he observes himself, which is especially relevant when it comes to social legislation. This has become a legal term, or the legal attire of values such as solidarity.

SOLIDARITY AS A PILLAR OF LEGAL ORDER DEVELOPMENT

As long as society is observed as a community, it becomes clear that solidarity is a necessary social value, and as the legal order is only the expression of the social order, it is apparent that solidarity has a special role within the legal order.

Naturally, the observation of solidarity and its related concepts implies analysing its origin and making a relational frame between the concepts of ‘brotherhood’ and ‘solidarity’.

Brotherhood is “primarily a phenomenon of blood relations” (Ratzinger, 2008, p. 11), but the use of the concept can be expanded. Initially, the concept referred to fellow countrymen, and afterwards to friends and the so-called concept of “similarity of opinions” (Ratzinger, 2008, p. 11). The concept immediately points to the fact that there are ‘them’ and ‘us’ – us being connected in a specific way and them being far away from us. The reason for such distance is that ‘they’ are not our blood relatives, friends or like-minded fellows. Set up in such a manner, brotherhood designates solidarity which is based on blood relations, friendship or dedication to the same idea. This actually means that “inner-directed ethical duty is different...” (Ratzinger, 2008, p. 12). Therefore, the ethical concept makes a difference between us and them, which limits the reach of solidarity based on the aforementioned assumptions. Even if we were to attempt to fit the development of the Panhellenic idea, which should be the basis of cosmopolitanism, into this concept, we would realise that the idea still separates people and makes solidarity impossible as “it is boldly emphasized that victories over Barbarians should be celebrated, while victories over Hellenes should be grieved...” (Đurić, 1987, p. 197).

The idea that “the task of the state is to arrange human life in a way that will make everyone happy by virtue” shall now become crystal clear (Đurić, 1987, p. 348). However, Plato’s (Πλάτων) idea and social principle, which is way above the individual, and which makes him “the true father and founder of universalism and collectivism i.e., social theory which is the synthesis of individualism and collectivism” (Đurić, 1987, p. 348) is reserved only for a specific circle of people that he considers equal, as he, unlike Sophists, insists on natural inequality between individuals.

Lucius Annaeus Seneca’s postulate that “the world is no longer *res publica Romana*, but a world of all people, regardless of their class and nationality” (Đurić, 1987, p. 464) indicates a specific step forward. Such a tendency is likewise displayed by Marcus Annius Catilius Severus, who considers that:

everything is one and everything is interwoven: there is one world, one God who is everywhere, one nature, one law and one mind which is common for all beings, and one truth, one perfection for all beings who share the same mind.

(Đurić, 1987, p. 466)

Again, one should have in mind that, at the time, it was completely legitimate to own a slave, so even brotherhood which was set up in the above manner did not refer to slaves and, thus, the reach of solidarity was quite limited.

The later stages of the development of the concept of 'brotherhood', which should be the foundation of solidarity, are still limited as "for an individual, a brother is a person who belongs to a community, not a community of any nation, but the community of a chosen nation" (Ratzinger, 2008, p. 13). In this particular case, brotherhood refers to "fellow countrymen and members of the same religion e.g., ethical duty of an Israeli towards another Israeli differs from ethical duty that an Israeli has towards pagans" (Ratzinger, 2008, p. 17).

Later periods in history, especially the period of Immanuel Kant, focused on the idea that the duty of brotherhood members was to do good "to other people, all in accordance with their abilities, regardless of the fact that they like or dislike other people..." (Kant, 1999, p. 187). According to Kant, the duties that we as brothers have towards others should, along with solidarity, include the concept of self-esteem i.e., the need to be kind, as well as to "spare brothers the humiliation" (Kant, 1999, p. 232) and insist on solidarity without egotism. This is an exceptional advancement in terms of understanding the concept of solidarity which, even though it has a tendency to do so, must not turn into egotism, but aim at helping even those "who are not worth loving" (Kant, 1999, p. 232). Kant himself emphasises that "the idea of *peaceable*, which does not necessarily imply friendly, community of all nations on the Earth that can interact actively, is not a philanthropic (ethical) principle, but a *legal* one" (Kant, 1999, p. 141). Such a legal principle shall become the core of the idea of "*ius cosmopolitanicum*" (Kant, 1999, p. 141), which has led to the development of the idea of solidarity as a value which supports the concept of cosmopolitanism. Cosmopolitan citizens cannot plead to their longevity without solidarity. Thus, it has become clear that its concept of law shall include such concepts, and Kant states that the concept of law "could be defined as a possibility of connecting general mutual compulsion with everyone's freedom" (Kant, 1999, p. 28). What Kant later calls *sympathia moralis* could be marked as an introduction to the definition of solidarity as a value specific for cosmopolitan citizens, based on the foundations of "humaneness" (Kant, 1999, p. 240). Our human nature can refer us to this state of solidarity, as "mutual happiness and compassion" (Kant, 1999, p. 240) are concepts that "humans are, by their nature, sensi-

tive to" (*ibid.*). Kant makes a very fine distinction between sheer compassion and duty, and "active participation" (Kant, 1999, p. 241) in the fate of the ones who are suffering, and thus "our duty is not to avoid places with poor people who lack the necessities of life, but to try to find them, never avoid hospital rooms..."(*ibid.*). Kant clearly highlights and explains the relation in which "blessed is the hand that gives" (Kant, 1999, p. 240), and adds that "gratitude is not the love that beneficiary gives back to the benefactor, but the *respect* towards the benefactor" (*ibid.*). Kant undoubtedly indicates that solidarity does not produce, or, to be more precise, sometimes cannot function, due to the repugnance of the status of the "humiliated" (Kant, 1999, p. 242), or due to "the cause of such ingratitude" (*ibid.*), that is, "the pride that would not let us tolerate people who are above us, the repulsion that we feel once we realize that we cannot be in the same position with such people" (*ibid.*). Such a viewpoint confirms that relational opposites in both humans and in the relation of 'me and you' are the same opposites, which "make theoretical forceful separation of egotism and altruism impossible" (Harmann, 2003, p. 84). The resulting attitude is that one of the pillars of solidarity is to avoid making other people the means, but to insist "on making other people purpose" (Kant, 1999, p. 246). The statement that Man himself is the purpose is the foundation stone of solidarity, as it erases all the unfavourable items that everyone's pride is ready to confront, because, when we ourselves are the purpose, there is no room for hatred due to the current unequal position in the state of need. This is as clear as: "each man is objectively 'someone', which separates him from other beings in this perceptible world..." (Wojtyla, 2013, p. 20). Therefore, "a personality cannot be a means of action..." (Wojtyla, 2013, p. 27). He immediately indicates that its opposite is arrogance, as a kind of "pretentiousness" (Kant, 1999, p. 249) which makes us "expect other people to underestimate themselves when they compare themselves with us..." (*ibid.*). Consequently, the arrogance which prevents us from seeing others as we see ourselves will be the stumbling block of solidarity, which has been understood in an adequate manner.

Solidarity set up in this manner refuses the instrumentalisation of humans, which has already been emphasised by Karl Heinrich Marx and his concept of 'alienation'. Namely, alienation denies the possibility of solidarity development and results in the fact that "instead of secular persons' involvement in society, we all end up facing horrible loneliness of a woman who delivers and a man who dies" (Radbruch, 1980, p. 125) because "we no longer believe in great ideals..." (Camps, 2007, p. 5) such as solidarity, all for the benefit of "liberal individualism" (Camps, 2007, p. 19). Thus, it seems that the concept of 'us' should be introduced into the concept of solidarity. The concept of 'us' represents a relational-value basis of solidarity which assumes the presence of a true community which

can 'give birth' to an adequate legal order based on values, not on the fear of sanctions. 'We' is beyond the relation between 'I' and my brother, because my brother has become 'I' as well. This is the basis for setting up a relation in which one's own pride will not be a barrier to creating relations based on humanity. Additionally, 'we' incapacitates the alienation which leads to egotism that will prevent us from doing something, or anything, for others. 'We' is the foundation of relational-value between myself and the community, that is, the community and myself are then one – a holistic one which respects my diversities, since solidarity, as a value, reaches its full scope "only when observed in terms of community" (Harmann, 2003, p. 421). Moreover, 'we' is the degree up to the full value of the integrality of society, which implies philanthropy that leads to solidarity "as a man for a man must be the subject of the same value..." (Wojtyła, 2013, p. 33). It is, thus, obvious that a state has 'ethical tasks' which are to be accomplished by "creating positive possibilities for actions and development of humans as spiritual beings" (Stres, 2001, p. 127). Therefore, we can understand that solidarity, as well as love "in mutual relations between people is not a completed thing" (Wojtyła, 2013, p. 29), but is "primarily a principle or idea that requires humans to adjust their behavior if they wish- and they are to wish- to liberate their behavior from the practical i.e., consumeristic attitude (Lat. *consumere* – to consume, spend) towards other personalities" (*ibid.*). The need for adjustment indicates that the relation between 'I' and 'you' is not based on actual "balance, but it can be switched and varied in numerous ways..." (Harmann, 2003, p. 84), since we, that is "each one of us is a reflection of what seems as insurmountable discrepancy between two ethical systems: system of duty and love, peace and humility, and the system of order and honor, battle and pride" (Radbruch, 1980, p. 132). This means that the existing human egotism will be a feature which will encourage altruism, that is, "within its limits, a very valuable thing" (Harmann, 2003, p. 84). To see someone else the way we see ourselves, or to understand someone else's needs is possible only if we have such needs and desires ourselves, since it is clear "that empathy and compassion" (Harmann, 2003, p. 84) become stronger if they are "experienced on personal level" (*ibid.*). In the same way, solidarity, as the product of altruism, can be effective only if it is accompanied by a personal understanding of the needs that the reality requires. Therefore, we can define a clear role of solidarity in human development, as it is "the deepest creative moment in the history of humans" (Harmann, 2003, p. 420). By limiting one's own egotism within the relation between 'I' and 'you', which marks solidarity, "blooms the size of community being" (Harmann, 2003, p. 420).

During the ancient period, solidarity as a general concept was brought closer to the concept of legal solidarity by combining the idea of the unity of private and public life with the idea of 'shared responsibility'

which would not contradict liberty and lead to pure submission, but would “be the base of legal and civil solidarity with many equal individuals” (Harmann, 2003, p. 420). Such responsibility and solidarity also refer to the individuals “who stray and disrespect a common, joint right” (Harmann, 2003, p. 421).

The concepts of ‘brotherhood’ and ‘solidarity’ have appeared in a unique form of “solidarity of religion” (Harmann, 2003, p. 465), which is “more fundamental than any other concept, and the base of each community in general” (*ibid.*). This is simply “because a community has always been the community of faith, macrocosmically belonging to people and intimately private” (Harmann, 2003, p. 465) because faith “moves mountains” (Harmann, 2003, p. 464). Thus, if faith ‘moves mountains’, it is quite clear that instead of ‘naturalistically’ seen brotherhood, there is a brotherhood which is based on “spiritual decision, on the ‘yes’ said to the God’s will” (Ratzinger, 2008, p. 33). In this way, one can become a brother by free will; in other words, “for Jesus, brothers are those who are united in their joint acceptance of God’s will” (Ratzinger, 2008, p. 33). This idea introduces the concept of responsibility for others – not only for others who exist ‘today’ but also for other who will exist ‘tomorrow’. The resulting idea is the idea of solidarity “with the people of the future” (Harmann, 2003, pp. 482-483) which “aims at looking forward” (*ibid.*) and aims at “people who do not know him” (*ibid.*). This has enabled the development of solidarity which is understood as a value. However, one should be very careful, as the history of radicalism and pathology has shown its exclusivity in this field by excluding the ones who do not belong to the circle. Hence, it has become obvious that our lives “since the times of accepting Christianity” (Radbruch, 1980, p. 132) have been torn “in two parts: pre-Christian legal feeling is placed right next to our Christian consciousness” (*ibid.*). Another problem that can be addressed is our own perception of God and his power, as “we are worried about things which directly concern us, not about universal justice that we, quite gladly, leave to God” (Broch, 1994, p. 49-50). By doing so, we exclude ourselves from universal solidarity, if such solidarity is even possible due to numerous obstacles, as “once the beliefs weaken, attitudes are all we have left” (Camps, 2007, p. 5) and then “due to unreliable content, we tend to turn to form and procedure” (*ibid.*).

The possibility of deriving an equally meaningful concept of solidarity from the idea of brotherhood results in antinomy in the concept itself, which leads us to the conclusion that solidarity is a “suspicious virtue” (Camps, 2007, p. 25). Even through the French Revolution, the opinions and attitudes of philosophers and philosophers of law wanted to determine the equal “nature of humans which preceded history” (Ratzinger, 2008, p. 21) and clearly emphasised that “all human differences derived from positive assumptions” (Ratzinger, 2008, p. 21). Marxism and its

concept of ‘comrade’ instead of ‘brother’ divided the world, which made the concept of absolute brotherhood disappear and resulted in humanity being “divided to two radically opposed groups: capital and proletariat...” (Ratzinger, 2008, p. 23). This dialectical opposition of the worlds, throughout history, resulted in numerous sad examples of complete ethical numbness, and thus “for full 20 years, a German indifferently observed an idiotic hunting of the Jews, and his bestial indifference made him accomplice to a cruel-systematic mass murder” (Broch, 1994, p. 10).

As “the idea of right cannot be anything else but justice” (Radbruch, 1980, p. 45), and as right is “a cultural concept i.e., a concept of a reality related to value...” (Radbruch, 1980, p. 44) and justice is a supreme social and legal value, it is clear that the endurance of the legal order is based on justice. However, it needs ‘operationalisation’, that is, solidarity as a “virtue which must be seen as precondition for justice and as item which will compensate for all the deficiencies of the primary virtue” (Camps, 2007, p. 26). As Victoria Camps considers that justice implies the field of abstraction, it needs concretisation which can be obtained through solidarity, as a specific addendum to justice, in order to achieve a specific degree of its implementation. An interesting fact is that solidarity is not accompanied by “extreme abundance and wealth of a society” (Camps, 2007, p. 27). Therefore, Victoria Camps concludes that the justice which appears in such societies is not “a fruit of actual civil cooperation, but the result of accepted and assumed social policy...” (Camps, 2007, p. 27). The presence of “hypocritical moralism” (Camps, 2007, p. 19) leads to societies which lack compassion and true care for others, which are replaced by the automatising of social relations. Once again, we shall return to the postulate that, due to the discrepancies which are present in humans themselves, solidarity is a suspicious virtue, or even a virtue of “the poor and jeopardized” (Camps, 2007, p. 27), based on the experience of some individuals. Jesus’ learning undoubtedly showed, and the course of time confirmed, that justice was not enough, and that “it needed mercy as well” (Camps, 2007, p. 27). Therefore, even though it seemed unusual, solidarity overcame justice, as it encompassed mercy and the human need not to turn their heads when facing favelas.

Aristotle (Ἀριστοτέλης) speaks about the necessity of friendship, which is an integral part of solidarity as a virtue, and points out that friendship is “essential for life” (Aristotle, 1982, p. 165) as “during the times of hardship and poverty, friends are the only refuge” (*ibid.*). Additionally, Aristotle was the first one to introduce the concept of ‘charity’ which makes men feel better, as “what would be the use of welfare if it did not imply charity...” (Aristotle, 1982, p. 165). He introduces the concept of ‘the self’, which would be used quite a lot during the years and decades to come. Even though Aristotle’s viewpoint, as many previously stated viewpoints, limits the circle of a brother, he believes that a perfect

friendship, and solidarity itself, can be made between “good people who are similar in their virtue, as they wish well one another and are good *per se*” (Aristotle, 1982, p. 169) because “Those who wish their friends only the best for friends’ own sake can be defined as the best among friends” (*ibid.*). People who are solidary without intentions other than help achieve the highest level of solidarity in the form of charity. This can be defined as a permanent relation, because the friendship which is the foundation of solidarity lasts as long as people are good, since virtue is long-lasting and stable. However, this type of friendship is also “reasonable” (Aristotle, 1982, p. 169), which means that it does not rely only on emotions. Aristotle has made a distinction within the above stated relation i.e., the relation between ‘I’ and ‘you’, wherein the relation implies equality with the one “who is more supreme” (Aristotle, 1982, p. 175); such is the “father’s relation to the son” (*ibid.*), since such relations differ in terms of roles and “neither gain from one another nor need to ask for anything...” (*ibid.*). The above stated has made us a step closer to the modern understanding of solidarity, which implies that the other person is in some kind of ‘trouble’ and needs help. Such a relation, which is based on the inequality of giving and receiving, must be arranged in a way which would not jeopardise friendship, since friendship, as the foundation of respect, is to be an integral part of solidarity and “it is clear for all, including the kings- those unworthy who see themselves as the wisest and the best do not deserve to call themselves friends” (Aristotle, 1982, p. 176). This disturbs solidarity relations in which my dignity may prevent others from offering help, and, at the same time, initiates ‘pretentiousness’. Therefore, instead of being surrounded by true friends, people like to be surrounded by ‘flatterers’ who will not be truly grateful for an act of solidarity.

Solidarity can also be the foundation stone for the creation of an adequate legal order, as true friendship can be formed “between the king and king’s subordinates” (Aristotle, 1982, p. 181), and thus the relation is similar to “fatherly friendship” (*ibid.*), but differs in “the size of charity” (*ibid.*). This has proved to be necessary, since “when the ruler and the ruled have nothing in common, friendship is absolutely impossible...” (Aristotle, 1982, p. 182), and therefore solidarity is impossible. Therefore, Aristotle states that such ‘dissimilar friendships’ require proportion, as proportion is something “that equalizes and preserves friendship” (Aristotle, 1982, p. 191), which accomplishes solidarity in a proper way. Aristotle further notes: “Moreover, I would like to emphasize that the presence of a true friend is a pleasurable thing both during happy times and during sad times” (Aristotle, 1982, p. 211).

Aristotle introduced the concept of ‘generosity’, which is similar to the solidarity with individuals we have seen for the first time in our lives, since “it can be exercised even toward the unknown individuals...” (Aris-

total, 1982, p. 199). The following lines indicate the core of generosity, which does not expect anything in return:

The one who has received an act of kindness will, in return, be generous and tend to offer what he sees as righteous; however, anyone who wishes well to others hoping to receive some kind of benefit, is not generous towards others, but towards himself...

(Aristotle, 1982, p. 200)

This is crucial if one wishes to avoid boasting about acts of kindness towards the poor. Therefore, Victoria Camps states that benevolence is the “cornerstone” (Camps, 2007, p. 29) of solidarity. Solidarity, set up in this way, may be defined as “mutual support” (Camps, 2007, p. 31), which is the foundation of a valid legal order supported by a solidarity that is “a duty and requirement of a rational dialogue” (Camps, 2007, p. 33).

However, the problem which refers to the practical application of solidarity values will, in contemporaneity, occur not due to poorly set up ethical systems and theory of values, but due to the fact that we, unlike the former city-states, are no longer a “community”, we do not have the same goals and do not share the same interests” (Camps, 2007, p. 34). Hence, without this part of practical axiology, we are unable to implement “common humanity” (Camps, 2007, p. 34), which will not, in its integralist spirit, negate our concern about ourselves. Therefore, we must state that, even though solidarity represents a kind of social imperative, it is only a possibility, similar to all other values which have been given, and not imposed.

SOLIDARITY IN SOCIAL WELFARE LAW

Social welfare law is a relatively new branch of law which has a twofold meaning: (1) social welfare law as social law (unlike state law); and (2) law which refers to the social position of individuals (Jašarević, 2010, p.1). Its purpose is to enable an adequate existential position and to provide an appropriate treatment of individuals within a society, as well as to provide the social security of individuals, families and the entire population (Jašarević, 2010, p 2-3), as the need for social security is classified as one of the essential human needs (Kosanović, 2012, p. 19). The occurrence of social welfare law is connected to the initial forms of social interventionism. However, before that, even before the introduction of social insurance, vulnerable individuals were protected in one way or another, due to the generosity of individuals, rulers and the church. Along with the occurrence of social welfare law, the virtue of generosity became the foundation of ‘natural solidarity’, which was, in terms of the public-legal domain, classified as ‘mandatory’ solidarity that the citizens chose at democratic elections, giving legitimacy to political parties that aimed at

establishing the system of mandatory social insurance/security (Lubarda, 2013, p. 60-61). Namely, the development of the industrial society resulted in, among other things, the fact that the economy of a country could not be competitive if its population was poor, sick or malnourished, and therefore the principle of solidarity was a dominant concept within social welfare law (Jašarević, 2010, p. 49).

Social protection, i.e. its part (having in mind that specific parts of social protection are parts of labour law), has become a relevant part of social welfare right. The principle of solidarity is very important in terms of social protection, especially in the field of social protection services and financial social assistance (Lubarda, 2012, p. 181).

The principle of solidarity is predominant in terms of social insurance. This especially refers to health insurance, as the principle of solidarity is the dominant and essential principle of health insurance (Golubović, 2012, p. 183). It is well known that each insurance is based on the principle *'do ut des'*, that is, *"I give in order that you may give"*, while social insurance has altered the stated principle by social function, which is predominantly based on the mandatory solidarity of social insurance beneficiaries (Golubović, 2012, p. 181).

The principle of solidarity is one of the primary principles of the public system of pension and disability insurance (such as our system), which is based on current financing. As distributive justice, the principle of solidarity is the corrective of the principle of reciprocity (commutative justice), and it is immanent to social law which is part of the public law (Lubarda, 2013, p.58). Generally speaking, if the principle of solidarity is insisted upon, pension and disability insurance is regarded more as a social category than insurance. The primary purpose of applying the principle of solidarity in pension and disability insurance is to provide certain rights to individuals whose investment in a pension fund could not cover a specific level of rights (Golubović, 2012, p. 181). Unlike the principle of current financing, the principle of solidarity is treated rather differently in fully capitalised systems of pension and disability insurance, as such systems are based on completely different principles (Clark et al, 2007, p.205-208). It is important to mention that public pension systems of current financing have been experiencing a crisis in the past several years, all depending on the country. There are several reasons for such a crisis, some of the most important being low population growth, the ageing of the population (including the extension of the expected lifespan), unemployment, and an underdeveloped economy. Due to the aforementioned, countries in which such a system is dominant have implemented various measures to maintain the system.

The crisis of these systems has resulted in the fact that less and less funds necessary for pension payment could be collected from contributions, and had to be compensated for from the budget (which is the case

in the Republic of Serbia). The fact that the number of citizens older than 65 has increased, while the share of the population younger than 15 has decreased (Nyce, Schieber, 2005, p. 101-106) is quite worrying.

In terms of the pension and disability insurance system, the principle of solidarity is expressed in several different ways. For instance, solidarity within the system of pension and disability insurance in the Republic of Serbia, which is regulated by the Law on Pension and Disability Insurance¹, is highlighted in terms of the absence of requirements which refer to the minimum insurance years of service necessary for exercising the right to disability pension if disability has occurred due to injury at the workplace or an occupational hazard, through increase of insurance years of service for women (by 6%), and due to defining family pension in terms of minimum insurance years of service, starting with 20 years (if the insurance beneficiary who passed away had less than that).

CONCLUSION

It seems that solidarity is a possibility which could be developed only if accompanied by the development of an integralist approach to the world which includes “intersubjectivity” (Camps, 2007, p. 35).

History has proved the insufficiency of theoretical conclusions and the existence of the thoughtless belief that everything will be as it is, as “everything that exists, could exist in another way” (Camps, 2007, p. 35). Of course, this requires the formation of clear attitudes which will make communication something more than the uninterested transmission of news that there are needs somewhere out there. In other words, “one might say that ‘sins’ of our times are sins without sinners” (Camps, 2007, p. 36), which leads to the presence of an ‘anonymous’ force which guides us (Camps, 2007, p. 41). To be honest, we are exposed to a plethora of news via multiplied means of communication, which enable us to know more about various places and their needs. However, this relation is in disproportion with our need and desire to really help. In this way, we have created a reality which lacks solidarity. Thus, we have tacitly erased solidarity, which is the precondition of an adequate public life and a legal order which, in its factual part, implies human behaviour. Therefore, without trying to negate man’s need to look after himself, man’s tendency to look after himself within a society is expressed through children and “other members, including relatives, friends, fellow countrymen” (Đurić, 1987, p. 480) and, finally, “the entire mankind” (*ibid.*). This is something that needs to be accepted, as “each individual is, so to say, the center of numerous concentric circles” (Đurić, 1987, p. 480). Such human con-

¹ “Official Gazette of RS”, no. 34/2003...125/2022.

nection is expanded to “the members of the entire ecumene” (Đurić, 1987, p. 481). Along with the development of the concept of solidarity, the Stoics developed the concept of ‘humaneness’, i.e. the assumption that “no one is a slave by nature, and no one is more noble than others, except if he is better and naturally gifted by ability to work” (Đurić, 1987, p. 481). This is the foundation of the contemporary understanding of solidarity, which must overcome its quality of being a possibility and must become absolute reality, so that the legal order could be maintained. Therefore, solidarity has become a social value which is given and which can be used for arranging social-legal relations within the legal order that will enable the equal development and growth of all participants.

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СОЛИДАРНОСТ КАО ПРАВНА ВРЕДНОСТ

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Резиме

Изгледа да ће проићи да је солидарност могућност која се може дијалектички развити само ако се развије социјално интегралистички приступ свету који се односи на све појединце. Историја је показала недовољност теоријских закључака и присутност лакоислене вере да ће све бити тако јер може да добије другачији облик постојања. Наравно да ово изискује изградњу јасних ставова који ће онда омогућити да комуникација буде више од незаинтересованог преношења вести о томе да негде постоје потребе. Истина, никада до сада нисмо били у оволикој мери изложени вестима, умноженим средствима комуникације која омогућавају да сазнамо за разна места и разне потребе тих места. Истовремено, тај је однос диспропорционалан нашој потреби и жељи да заиста помогнемо. На тај начин смо створили стање у којем апсолутно недостаје солидарности. Тиме се прећутно брише солидарност која је услов ваљаног јавног живота, и без које нема ваљаног правног поретка који се у свом фактичком делу и састоји од понашања људи. Дакле, негирајући потребу човека да брине о себи, ако постоји заједница, наклоност према себи ће се преко потомства проширити и на све друге. Ово је основа савременог схватања солидарности која мора да превазиђе своје стање могућности и постане апсолутна стварност како би правни поредак могао да опстане. Тако солидарност постаје социјална вредност која је дата и путем које се могу уредити друштвено-правни односи унутар правног поретка, који ће потом омогућити једнак раст свих учесника.

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Paper length. Research papers should not exceed 37.000 characters (spaces included), and reviews should not be longer than 8.000 characters (spaces included).

Language, alphabet. The languages of publication in the TEME is English (font *Times New Roman*). Contributions be rejected if the language is not at the appropriate level of correctness and style. If the authors wish to increase the visibility of their papers, they are supposed to submit Serbian version of the article as well (as Supplementary file - Word format, using the Cyrillic alphabet).

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- The paper should follow the **IMRAD** structure (Introduction, Methods, Results and Discussion), when it presents an empirical study
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Each paragraph should have the first line indented (1 cm).

In-text citations: Whenever referring to a source (monograph, article, statistical source), the author should cite the source in the text, using the

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- When referring to several works by the same author, provide all the years of publication chronologically after the author's name. If there are several works by the same author published the same year, provide further specification using letters (a, b,...) after the year of publication: "...confirming this hypothesis (Wuthnow, 1987a, p. 32)...".

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To explain how “culture through language affects the way we think and communicate with others of different background” (Gumperz, 2001, p. 35), Gumperz states:

“Conversational inference is partly a matter of a priori extra-textual knowledge, stereotypes and attitudes, but it is also to a large extent constructed through talk” (Gumperz, 2001, p.37).”

It is crucial that the in-text citations and references should match the literature listed at the end of the paper. All in-text citations and references must be listed in the References, and the References must not contain sources not referred to or cited in the text. The bibliography listed at the end of the paper should contain author names and source titles in original languages and alphabets, without translation.

Tables, graphs, and figures. Tables, graphs and figures should be numbered (sequentially), with captions explaining their content. Captions should precede tables, but follow graphs and figures. Graphs and figures must be clearly visible in the text, so they should be provided in 300dpi resolution. Graphs and figures must be single objects (no Drawing elements added). Where necessary, mathematical formulas should be added to the text using Microsoft Equation Editor.

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provided in brackets. The works by the same author should be listed chronologically (from the most to the least recent ones). Wherever possible, provide the DOI number, too, in addition to other reference data.

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EXAMPLES OF SOURCE QUOTING AND REFERENCING:

Journal papers and articles – 1 author

In-text citation:

(Manouselis, 2008), i.e. (Manouselis, 2008, p. 55)

In ‘References’:

Manouselis, N. (2008). Deploying and evaluating multiattribute product recommendation in e-markets. *International Journal of Management & Decision Making*, 9, 43-61. doi:10.1504/IJMDM.2008.016041

Journal papers and articles – 2 to 6 authors

In-text citation:

First reference: (Uxó, Paúl, & Febrero, 2011)

Subsequent references: (Uxó et al., 2011)

In ‘References’:

Uxó, J., Paúl, J., & Febrero, E. (2011). Current account imbalances in the monetary union and the great recession: Causes and policies. *Panoeconomicus*, 58(5), 571-592.

Journal papers and articles – more than 6 authors

In-text citation:

(Cummings et al., 2010, p. 833)

In ‘References’:

Cummings, E., Schermerhorn, A., Merrilees, C., Goetze-Morey, M., Shirlow, P., & Cairns, E. (2010). Political violence and child adjustment in Northern Ireland: Testing pathways in a social-ecological model including single-and two-parent families. *Developmental Psychology*, 46, 827-841. doi: 10.1037/a0019668

Book – 1 author

In-text citation:

(Heschl, 2001, p. 33)

In ‘References’:

Heschl, A. (2001). *The intelligent genome: On the origin of the human mind by mutation and selection*. New York, NY: Springer-Verlag.

Book – edited volume

In-text citation:

(Lenzenweger & Hooley, 2002)

In ‘References’:

Lenzenweger, M. F., & Hooley, J. M. (Eds.). (2002). *Principles of experimental psychopathology: Essays in honor of Brendan A. Maher*. Washington, DC: American Psychological Association.

Paper or chapter in an edited volume**In-text citation:**

(Cvitković, 2007)

In ‘References’:

Cvitkovic, I. (2007). Katolicizam [Catholicism]. U A. Mimica i M. Bogdanović (Prir.), *Sociološki rečnik [Dictionary of Sociology]* (str. 226-227). Beograd: Zavod za udžbenike.

Encyclopaedia entry**In-text citation:**

(Lindgren, 2001)

In ‘References’:

Lindgren, H. C. (2001). Stereotyping. In *The Corsini encyclopedia of psychology and behavioral science* (Vol. 4, pp. 1617-1618). New York, NY: Wiley.

Papers in Conference Proceedings**In-text citation:**

(Bubanj, 2010)

In ‘References’:

Bubanj, S., Milenković, S., Stanković, R., Bubanj, R., Atanasković, A., Živanović, P. et al. (2010). Correlation of explosive strength and frontal postural status. In: Stanković, R. (Ed.): *XIV International Scientific Congress FIS Communications 2010 in Sport, Physical Education and Recreation* (191-196). Niš: University of Niš, Faculty of Sport and Physical Education.

PhD Dissertations, MA Theses**In-text citation:**

(Gibson, 2007)

In ‘References’:

Gibson, L. S. (2007). *Considering critical thinking and History 12: One teacher’s story* (Master’s thesis). Retrieved from <https://circle.ubc.ca/>

Institutions as authors**In-text citation:**

(Републички завод за статистику, 2011)

In ‘References’:

Републички завод за статистику. *Месечни статистички билтен*. Бр. 11 (2011).

Laws**In-text citation:**

(Закон о основама система васпитања и образовања, 2004, чл. 5, ст. 2, тач. 3.)

In 'References':

Закон о основама система васпитања и образовања, Службени гласник РС. Бр. 62 (2004)

Legal and other documents

In-text citation:

(Legal Consequences for States of the Continued Presence of South Africa in Namibia (South West Africa) notwithstanding Security Council Resolution 276, 1971)

In 'References':

Legal Consequences for States of the Continued Presence of South Africa in Namibia (South West Africa) notwithstanding Security Council Resolution 276, (1970), ICJ Reports (1971) 12, at 14

Please refer to:

Publication Manual of the American Psychological Association, 6th Edition, 2009;

<http://www.library.cornell.edu/resrch/citmanage/apa>

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