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INTEGRATED POLITICS OF
RESEARCH AND INNOVATIONS**

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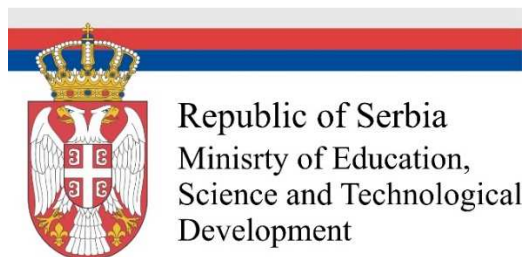


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***Leadership & Management:
Integrated Politics of Research and Innovations***

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P R E F A C E

The organizing is an evolutionary phenomenon, distinctive because of laws of existence and maintaining all structures in all processes of their functioning. As such, it is a civilizational phenomenon also that occurs as a component of human, individual and social activities and as a factor in the overall development of man and society. On the other hand, as a deliberate human activity, organizing involves seeking solutions to problems that occur on the way to achieving specific goals. No goal can be achieved without appropriate or necessary, or at least minimal organization of conditions, factors and processes needed for goal achievement. However, the modern era requires new types of leaders and managers, and new forms of organization; demands those who are willing and able to lead the company / corporation / state, in a distinct competitive environment, with all the good and bad sides brought by the globalization of world economy.

The organizers of the LIMEN 2018 conference - *Faculty of Engineering Management - Belgrade, Modern Business School - Belgrade, Faculty of Business and Management Sciences - Novo Mesto, Slovenia, Faculty of Business Management and Informatics - Novo Mesto, Slovenia, Business Academy Smilevski - BAS, Skopje, Macedonia, BAS Institute of Management, Bitola, Macedonia and Association of Economists and Managers of the Balkans headquartered in Belgrade - Serbia* – have recognized the problem that nowadays exists in most modern organizations: *so much management and too little of leadership*; so they have organized 4th International Scientific-Business Conference titled: Leadership and Management: Integrated Politics of Research and Innovations - LIMEN 2018 in Belgrade on December 13, 2018 at the Hotel Moskva.

Bearing in mind the challenges of a dynamic engagement in contemporary organizations, it is clear that within the analysis of these two important subjects should be applied interdisciplinary approach. For this reason, the main theme of the conference LIMEN 2018 was processed through the following key topics.

- Leaders and Leadership
- Entrepreneurship, Innovation, Creativity
- Management of Small and Medium-sized Enterprises
- Contemporary Strategic Management
- Financial Management and Banking
- Marketing Management
- Project Management
- GREEN Management
- Natural Resource Management
- Quality Management
- Management of New Technologies
- Management Information Systems
- Education Management
- Intercultural Management
- Public Sector Management
- Human Resources Management
- Organizational Behavior
- Business Ethics
- Labour Law
- Business Law

The aim of this year's conference is also achieved - bring together the academic community of the Balkans region and other countries and publication of their papers with the purpose of popularization of science and their personal and collective affirmation. The unique program combined presentation of the latest scientific developments in these areas, interactive discussions and other forms of interpersonal exchange of experiences.

The conference was opened by: Prof. dr Vladimir Tomašević, Dean of the Faculty of Engineering Management – Belgrade and a member of the Scientific Committee of the conference, Doc. dr Nina Maksimović Sekulić, Assistant Director of the Modern Business School from Belgrade and Uroš Mirčević, President of the Association of Economists and Managers of the Balkans.



Participation in the conference took a total of **168 researchers with the paper** representing:

- 18 different countries,
- 47 different universities,
- 34 eminent faculties,
- 3 scientific institutes,
- 10 colleges,
- various ministries, local governments, public and private enterprises, multinational companies, associations, etc.

In the Conference Proceedings of the LIMEN 2018 conference **82 double peer reviewed papers** and **11 abstracts** have been published on more than **600 pages**.

1. Albania
2. Austria
3. Bosnia & Herzegovina
4. Bulgaria
5. Croatia
6. Czech Republic
7. Greece
8. Hungary
9. Italy
10. Macedonia
11. Montenegro
12. Poland
13. Romania
14. Russia
15. Serbia
16. Slovakia
17. Slovenia
18. Spain



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6. Graz University of Technology, Graz, Austria
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20. Telematic University Giustino Fortunato, Benevento, Italy
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42. Univerziteta u Nišu, Niš, Srbija
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8. Visoka škola modernog biznisa, Beograd, Srbija

9. Visoka škola za poslovnu ekonomiju i preduzetništvo, Beograd, Srbija
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UTICAJ STRANIH DIREKTNIH INVESTICIJA NA RAZVOJ INTEGRALNOG INOVACIONOG MENADŽMENTA

IMPACT OF FOREIGN DIRECT INVESTMENTS ON DEVELOPMENT OF INTEGRAL INNOVATION MANAGEMENT

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Moamer Softić²
Radovan Vladislavljević³

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Sadržaj: *Cilj rada je prikaz rezultata istraživanja vezanih za uticaj direktnih stranih investicija na razvoj inovacionih kapaciteta. Osnovna premisa rada ogleda se u tome što jedan segment makroekonomskog rasta je vezan za inovacione napore privrede. Ozbiljna ograničenja konkurentnosti u zemljama Zapadnog Balkana predstavljaju nedovoljna razvijenost institucionalne i fizičke infrastrukture, kao i ograničen potencijal za inovacije. Kroz direktne strane investicije na neposredan način moguće je razviti integralni sistem menadžmenta orijentisanog ka inovacijama.*

Ključne reči: *direktne strane investicije, integralni sistem menadžmenta, inovacije, inovacione politike.*

Abstrakt: *The scope of the paper is to present the results of research related to the impact of foreign direct investments on the development of innovation capacities. The main premise of the work is that one segment of macroeconomic growth is linked to innovation efforts. A serious limitation of competitiveness in the Western Balkan countries are underdeveloped institutional and physical infrastructure, as well as a limited potential for innovation. Through direct foreign investment, it is possible to develop an integral innovation-oriented management system.*

Keywords: *foreign direct investment, integral management system, innovation, innovation policy.*

UVOD

U osnovi integralnog menadžmenta su inovacioni napori, koji idu ka tome da povećaju produktivnost preduzeća. Ono što je bio i ostao problem domaće privrede je hronični nedostatak finansijskih sredstava. Razvojem tržišta, kao i pojavom nove radne snage koja je edukovana u oblasti upravljanja inovacionim procesima stečeni su uslovi za uvođenje posebnog modela menadžmenta.

Pomoću direktnih stranih investicija domaća ekonomija može postati dovoljno konkurentna na međunarodnom tržištu. Ovo vodi ka tome da uloženi kapital stranih investitora može višestruko žda se vrati. Baza za povećanje pravednog rasta leži u implementaciji novih modela

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menadžmenta usmerenih ka inovacijama. Inovacije mogu da se usmere, ne samo ka novim proizvodima, već i na poboljšanja poslovno-tehničkih procesa. Na ovaj način povećava se produktivnost, a na neposredan način povećava se zadovoljstvo kupaca.

U radu se diskutuje o pitanjima vezanim za strukturu i svrhu direktnih stranih investicija, kao o kreiranju adekvatnog sistema menadžmenta. Sa druge strane imamo pojavu integralnog menadžmenta, kao nove paradigme u upravljanu organizacijama. Razlog ovome je nemogućnost posmatranja samo jednog aspekta menadžmenta i to nezavisno od mnogih drugih aspekata koji su važni. Jedino holističkim pristupom moguće je da se kreira adekvatni model menadžmenta, koji će biti u stanju da na produktivan način iskoristi prednosti direktnih stranih investicija.

Cilj rada je istražiti uticaj direktnih stranih investicija (SDI) na razvoj integralnog menadžmenta u preduzećima.

STRANE DIREKTNE INVESTICIJE

Kretanje kapitala u međunarodnim okvirima, odnosno *izvoz, uvoz i prenos kapitala*, sve je aktuelniji teorijsko-praktični i ekonomsko-politički problem zemalja, bez obzira na stepen njihove ekonomske razvijenosti. Ne radi se samo o kretanju kapitala iz razvijenijih u nerazvijene zemlje, nego i o kretanju kapitala između samih razvijenih zemalja, kao i o kretanju kapitala između bivših socijalističkih i zemalja u razvoju. Nesporno je da zemlje Zapadnog Balkana imaju i pogodnosti koje proističu iz različitih prednosti kao što su geografski položaj i kulturna bliskost sa razvijenim zemljama Evropske unije.

Atraktivnost zemalja za SDI zavisi od više faktora poput: **traženja tržišta, resursa i/ili želje da se poveća efikasnost**. Ukoliko traži tržišta investitora zanimaju veličina tržišta i BDP po glavi stanovnika, rast tržišta i ostali makroekonomski pokazatelji. Atraktivnost zavisi od niza faktora poput: raspoloživosti sirovina, jeftine i kvalifikovane radne snage, inovacija i infrastrukture. Ukoliko se zahteva rast efikasnosti prvenstveno se cene troškovi materijalnih i ljudskih resursa, članstvo zemlje u regionalnim integracijama, razne olakšice koje omogućuju neke vlade (investicione olakšice, socijalne pogodnosti). Postoje i dodatni faktori priliva investicija poput socio-ekonomske stabilnosti, privredni propisi, standardi tretmana stranih filijala, zaštita konkurencije i sl.

U daljem razmatranju SDI potrebno je da se napravi distinkcija između portfolio ulaganja i direktnih stranih investicija. Portfolio investicije imaju povoljan odnos između nivoa rizika, koji preuzima investitor i visine dobiti koja se može ostvariti, u odnosu na ostale vidove investiranja. Portfolio investicije nose veći rizik i veći prinos na investirana sredstva od bankarskih depozita, ali su rizik i prinos niži nego kod direktnog investiranja. Otuda investitori koji su manje skloni riziku, a motivisani su ostvarenjem veće kamate na svoj kapital, često pristupaju diversifikaciji svojih portfolija ulažući u veći broj odabranih hartija od vrednosti. Takve karakteristike portfolio investicija posebno odgovaraju institucionalnim investitorima, kao što su penzioni fondovi, osiguravajuća društva, koji su motivisani da oplode svoj kapital na duži rok bez većeg rizika.

U sledećoj tabeli možemo videti razlike između SDI i portfolio investicija. Ova dva pojma su u korelaciji što se tiče načina na koji se ulaže novac, ali postoje suštinske razlike koje moramo da obradimo kako bi razumeli prednosti SDI.

Tabela 1. Poređenje direktnih i portfolio investicija [1]

| | DIREKTNE INVESTICIJE | PORTFOLIO INVESTICIJE |
|-----------------------------------|---|---|
| Motivi investiranja | - Sigurnost kapitala i maksimiziranje vrednosti portfolija uloga - Kontrola upravljanja u različitim zemljama domaćina radi optimalne alokacije resursa i maksimalnog ukupnog profita u međunarodnoj operaciji | - Sigurnost kapitala i maksimiziranje vrednosti portfolija uloga |
| Kompozicija investicije | - Akcionarski kapital preduzeća koji je obezbedio strani investitor iznad procenta potrebnog za sticanje kontrole upravljanja - Reinvestirani profiti - Ostali dugoročni kapital | - Dugoročne obveznice (obveznice javnog sektora i ostale obveznice) - Akcionarski kapital izvan SDI (ispod procenta potrebnog za kontrolu upravljanja) |
| % vlasništva nad kapitalom | - Za "koncentrovane SDI", tj. SDI jednog investitora ili grupe povezanih investitora 10-25 % - Za rasute (difuse) SDI, tj. investicije većeg broja nepovezanih akcionara - više od 50% vlasništva za jednog stranog investitora ili 100 % stranog vlasništva | - Za obveznice: nema specifikacije - Za akcije: vlasništvo je ispod procenta potrebnog za kontrolu upravljanja |
| Prednosti | - Dobit na kapital zbog većih cena akcija i dividende (profit) - Menadžerski honorar i ostale ekstra prednosti, koje idu sa posedovanjem kontrole upravljanja | - Dobit od apresijacije vrednosti obveznice i fiksna dobit na obveznicu. |
| Troškovi | - Troškovi direktnog investiranja (troškovi kapitala) - Troškovi informisanja (informacije o zemlji domaćinu i troškovi komuniciranja) - Investicioni rizik | - Troškovi kapitala - Znatno manji troškovi informisanja |

Strane direktne investicije predstavljaju jedan od tri vida međunarodnog kretanja privatnog kapitala i one su dugoročnog karaktera. Strana direktna investicija postoji kada investitor svojim ulaganjem stiče pravo svojine, odnosno vlasničku kontrolu i kontrolu upravljanja preduzećem u inostranstvu. Direktnu investiciju u inostranstvu možemo, najjednostavnije, definisati kao svaki oblik ulaganja u određeno preduzeće, kojim se stiče vlasnička kontrola nad njim [2]. Iznos profita zavisi od uspešnosti korišćenja uloženi sredstava i nije mu unapred poznat, kao kod portfolio investicija i zajmovnog kapitala.

Ovo je jedan od glavnih razloga zbog kojih strani investitori imaju glavni cilj da preduzeće bude što je bolje i jače na tržištu. Ostali vidovi investiranja prenose veliki deo rizika na finansijske institucije i samo preduzeće. Sa druge strane SDI su visoko rizične sa stanovišta povraćaja uloženog. Međutim, SDI nema granicu na povraćaj uloženog u preduzeće jer ne postoji kamatna stopa ili sličan sistem osiguranja zarade. Prinosi kod SDI nisu toliko sigurni, kao kod ostalih vidova investiranja.

Želja za profitom, kao kod SDI, vodi ka tome da se implementiraju svi potrebni alati i tehnike koji će dovesti do ispunjenja postavljenih ciljeva. Konjunktura pomeranja tržišta mogu u velikoj

meri da utiču na svrhu i strukturu investiranja. Kod ostalih vidova investiranja povlačenje investitora znači da se veliki deo kapitala preduzeća mora konvertovati u aktivu kojom bi se isplatili investitori. Ovo se postiže kroz različite oblike bankrotstva ili stečaja. Sa druge strane investitori u SDI preuzimaju rizik neuspešnog poslovanja. Kako bi se neuspeh izbegao SDI investitori moraju da dopuste implementaciju novih načina poslovanja kako bi preduzeće ostalo konkurentno na tržištu.

SDI investicije se mogu ostvariti u različitim oblicima i realizovati na različite načine:

- osnivanje novog preduzeća (*green-field investicije*) u potpunom vlasništvu stranca ili kroz zajednička ulaganja (*joint venture*),
- preuzimanje postojećih preduzeća u drugoj državi putem kupovine, dokapitalizacije ili konverzijom kredita u vlasništvo – swop aranžman (tzv. *prekogranične akvizicije*),
- fuzija – spajanje kompanija (*prekogranični merđžeri*),
- kombinaciju *green-field* investicije i akvizicije (*brown-field investicije*),
- zajednička ulaganja bez prava vlasništva (tzv. ugovorna ulaganja) i
- investiranje u obliku koncesija, B.O.T. sistema i *time sharing-a*.

Za SDI karakteristične su sledeće komponente:

- vlasnički kapital,
- reinvestirani profit kompanije u kojoj strani investitor ima vlasnički kapital,
- međukompanijski zajmovi i međukompanijske dužničke transakcije između matične i združene kompanije.

UPRAVLJANJE RAZVOJEM

Glavni razlog koji je doveo do višeg životnog standarda danas, nego pre jednog veka je razvoj tehničkih znanja [3]. Iz ove rečenice stoji izuzetno kompleksna pojava koja u svojoj osnovi objedinjava obrazovanje, preduzetništvo i promenu načina upravlja kompanijama. Ova promena paradigmi vezana je za razvoj informaciono-komunikacionih tehnologija (IKT). Danas je moguće kreirati visoko efikasan model razvoja novog proizvoda.

Jedna od komponenti razvoja je vezana za obrazovanje. Ovo se može najbolje videti na primeru Irske, koja je uložila veliki napor da one koji su odustali od školovanja da ih vrati u školski sistem. Tako da je do sredine devedesetih godina dvadesetog veka preko 80 % učenika koji su odustali od škole uspeali da završe srednje obrazovanje. Takođe, treba naglasiti da od ovog broja njih 50 % je uspeo da završi neki oblik višeg obrazovanja [4]. Ovo je jedan od razloga što je danas Irska jedna od vodećih država, koje imaju dinamičan i brz razvoj svoje ekonomije.

Tokom decenija mnogi teoretičari u oblasti ekonomije i menadžmenta radili su na kreiranju modela razvoja. Solov model dugoročnog ekonomskog razvoja naglašava inovacije kao ključni faktor. Nažalost inovacije se posmatraju kao egzogeni elementi koji nisu do kraja istraženi [5]. Ovo vodi ka tome da je inovativnost jedne nacije od izuzetnog značaja. Nažalost inovativnost nije do kraja objašnjena niti su date smernice na koji način se može razviti ista. Međutim, iz različitih primera možemo reći da inovativni sistem jedne države ne može biti postavljen kao slučajna komponenta kojom se ne upravlja. Ostaci starijeg sistema poslovanja pomeraju inovativne napore često u drugi plan.

Destruktivan faktor inovativnosti možemo videti praktično u celokupnoj ekonomskoj istoriji, Novi proizvodi i procesi, pored unapređenja, unose i potrebu za promenama načina na koji poslovno-društveni procesi funkcionišu. Konkretno značenje ovog je migracija moći, koja u

nedovoljno fleksibilnim društveno-ekonomskim sistemima nije dobrodošla. Pojava novih radnih mesta od kojih zavisi uspešno poslovanje ili pojava ovih radnika koji imaju primat u domenu znanja dovodi do virtualne nejednakosti. Naglašavamo virtualne nejednakosti, jer iz novih načina poslovanja pojavljuju se novi procesi uvećanja vrednosti. Iz ovih procesa kreiraju se novi proizvodi koje tržište lakše apsorbuje.

Ovo je jedan od faktora koji je doveo do toga da mnoge bivše zemlje istočnog bloka imaju zanemaren institucionalni sistem razvoja. Pod institucionalnim razvojem ne mislimo samo na postojanje različitih tipova inovacionih centara i instituta već na razrađen sistem saradnje naučne delatnosti, poslovnih subjekata kao i dobro definisan interni sistem inovacionih procesa.

INTEGRALNI MENADŽMENT

Integralni menadžment je sistem upravljanja koji integriše sve podsisteme jednog preduzeća u jedinstveni sistem. Na ovaj način omogućava se kompanijama da rade kao jedinstveni entitet sa jedinstvenim ciljem. Stariji sistem upravljanja baziran na doktrinama, koje su vladale u bivšim zemljama istočnog bloka upravljanje se vršilo birokratskim putem. Na ovaj način ugušene su inovacione inicijative, kao i preduzetnički duh.

„Važna evolucija u onome što danas zovemo industrijski svet je da više nije industrijski. Svedoci smo brzog prelaska iz industrijskog društva u društvo znanja“ [6]. Značaj ove činjenice za naš rad ogleda se u tome da „tradicionalni“ način upravljanja baziran na industrijskoj paradigmi stroge podele posla više nije validan. Počeci industrijske revolucije vezuju se za podelu procesa proizvodnje na manje segmente, kako bi se što efikasnije obavljali. Ovaj način razmišljanja seli se u domen administracije i uprave, ovo je kreiralo jak sistem administrativnih podela, koje su u velikoj meri uticale na dalji razvoj menadžmenta.

Sa pojavom računara mnoge barijere su probijene, a i mnogi procesi mogu da se objedine. „Svaka organizacija posluje kao složena mreža podistema ili manjih komponenti, čije aktivnosti samostalno i kolektivno podržavaju rad većeg sistema“ [7]. Tako da je uloga integralnog menadžmenta usložnjavanje poslovnih procesa pomoću novih informaciono komunikacionih tehnologija. Uloga integrisanog menadžmenta je neograničena bez obzira na tip organizacije jer podstiče se proces integracije podataka, funkcija i procesa odlučivanja [8]. Iz ovoga možemo zaključiti da je cilj integrisanog menadžmenta konstantno unapređenje poslovanja.

SDI u ovom segmentu igraju značajnu ulogu u obliku katalizatora promena u smeru povećanja efikasnosti poslovanja. Stariji sistem poslovne politike, koji se promovisao išao je u smeru pune zaposlenosti na uštrb efikasnosti. Strani investitori ne žele ovakvu politiku, već idu ka maksimizaciji profita. Sistem direktnih stranih investicija je dobar, jer rizik poslovanja se deli između investitora i kompanije. Drugi oblici investiranja isključuju rizik prema investitorima, što može dovesti do različitih anomalija u poslovanju. Ovo je okosnica formiranja integralnog menadžmenta sa svrhom kreiranja visoko efikasnog poslovnog preduzeća.

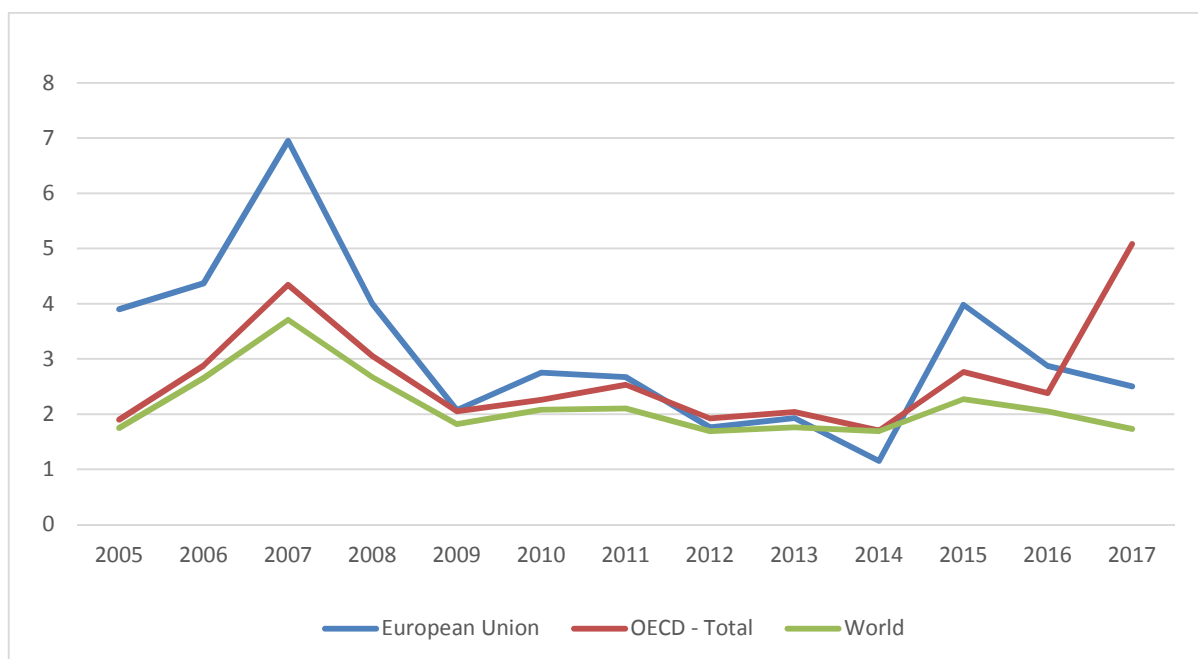
Svrha integralnog menadžmenta je integracija svih relevantnih podistema, koji dovode do bržeg, boljeg i efikasnijeg poslovanja. Mnoge kompanije koje su uspešno privatizovane doživele su transformaciju, koja je dovela do smanjenja troškova i povećanja profita. Većina ovakvih preduzeća je uvela moderan informacioni sistem baziran na sistemu planiranja resursa (ERP), koji daje mogućnost lakog deljenja informacija među segmentima preduzeća.

Naglasak je na tome da su IKT samo alat za postizanje integracije upravljačkih funkcija, a SDI katalizatori, koji motivišu promene u organizacijama. Ni jedan od ovih faktora, sami po sebi, ne mogu po automatizmu da dovedu do stvaranja efikasnog poslovnog sistema, pojedinačno gledano svi faktori su ograničenog dometa. Zajedno kreiraju sinergetski efekat koji dovodi do željenog cilja. Integralni menadžment je logičan nastavak napora menadžmenta i investitora u nastojanju da postignu konkurentsku prednost na tržištu. Naravno da i sektor industrije koji se posmatra igra određenu ulogu, nije svejedno da li unutar jedne grane industrije imamo zahteve za uvođenjem specifičnih načina menadžmenta [9].

ANALIZA MAKROEKONOMSKIH POKAZATELJA



SDI su imale porast, a zatim stagnaciju, dok su druge vrste investicija imale porast, a zatim pad. Ovo se može objasniti nedovoljno dobrim plasmanom ostalih vrsta investicija.

Slika 1. Direktne strane investicije (% BDP godišnje) [10]



U prethodnom periodu imali smo drugačiju raspodelu stranih investicija, koja je imala dinamičniji razvoj baš u domenu SDI. [11] Naime, kratkoročno gledano, portfolio kao način investiranja je dobar, ali na duže staze korisnici ovih investicija najviše snose rizik poslovanja. Mnogi nisu spremni da sami snose rizik poslovanja.

Slika 2. Priliv stranih direktnih investicija u Srbiji (mil. EUR) [12]

| | 2016 | 2017 | Change in rank vs. 2016 | Share (2017) | % change | Jobs created | Jobs share |
|--|--------------|--------------|----------------------------|--------------|------------|----------------|-------------|
|  UK | 1,138 | 1,205 | - | 18% | 6% | 50,196 | 14% |
|  Germany | 1,063 | 1,124 | - | 17% | 6% | 31,037 | 9% |
|  France | 779 | 1,019 | - | 15% | 31% | 25,126 | 7% |
|  Netherlands | 409 | 339 | - | 5% | -17% | 8,541 | 2% |
|  Russia | 205 | 238 | +2 | 4% | 16% | 25,788 | 7% |
|  Spain | 308 | 237 | -1 | 4% | -23% | 13,685 | 4% |
|  Turkey | 138 | 229 | +3 | 3% | 66% | 13,078 | 4% |
|  Belgium | 200 | 215 | - | 3% | 8% | 5,838 | 2% |
|  Poland | 256 | 197* | * | 3% | * | 24,000 | 7% |
|  Finland | 133 | 191 | +1 | 3% | 44% | 4,300 | 1% |
|  Ireland | 141 | 135 | -2 | 2% | -4% | 8,961 | 3% |
|  Czech Republic | 110 | 134 | +1 | 2% | 22% | 14,490 | 4% |
|  Romania | 132 | 126 | -1 | 2% | -5% | 16,490 | 5% |
|  Serbia | 46 | 118 | +8 | 2% | 157% | 20,103 | 6% |
|  Hungary | 107 | 116 | -1 | 2% | 8% | 17,017 | 5% |
| Others | 876 | 1,030 | - | 15% | 18% | 74,819 | 21% |
| Total | 6,041 | 6,653 | | 100% | 10% | 353,469 | 100% |

U prethodnom periodu fluktuacija SDI u Republici Srbiji (2004 – 2012. godine) bila je velika. [13] Naime, ovaj period obuhvata period kada je svetska ekonomska kriza pogodila našu zemlju. Ovo je naravno negativno uticalo na SDI, međutim u poslednjim godinama vidimo povratak stranih investicija. Međutim u poslednjih nekoliko godina vidimo pomak u rangu privlačenja SDI.

ZAKLJUČAK

Iz analize vidimo da postoji određeni priliv SDI u Republiku Srbiju, međutim postavlja se pitanje da li je to dovoljno da u većoj meri pokrene privredu. SDI su još uvek u relativno malom obimu i ne utiču previše na transformaciju poslovnih sistema Republike Srbije. Međutim, kompanije koje su prošle privatizaciju i dobile novac kroz SDI su uspešno prošle transformaciju poslovanja.

Sa pojavom SDI može se očekivati razvoj prvih internih inovacionih procesa, zatim kvalitetnije saradnje sa međunarodnim i domaćim inovacionim institutima. Ovaj proces je prisutan u manjoj meri. Ovim radom želeli smo da prikazemo u kom pravcu se ovi napori kreću.

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IZAZOVI MIROVINSKIH SUSTAVA ZEMALJA BIVŠE JUGOSLAVIJE

CHALLENGES FACING PENSION SYSTEMS OF EX-YUGOSLAVIAN COUNTRIES

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Sadržaj: *Zemlje bivše Jugoslavije naslijedile su mirovinske sustave koji su se suočavali s mnogobrojnim izazovima zahvaljujući socio-ekonomskim uvjetima i demografskom pritisku. Reforme mirovinskog sustava bile su u planu od ranih faza prijelaza s centralno planskih na tržišno orijentirana gospodarstva. Većina zemalja regije provela je strukturne mirovinske reforme, a neke uvode obvezne mirovinske fondove čija je uloga dovedena u pitanje zbog dugoročno neodrživih sustava. Ovaj rad daje pregled strukture mirovinskih sustava s naglaskom na individualnu kapitaliziranu štednju, a usredotočuje se na 6 zemalja: Bosnu i Hercegovinu, Crnu Goru, Hrvatsku, Makedoniju, Sloveniju i Srbiju.*

Ključne reči: *Mirovinski sustav, zemlje bivše Jugoslavije, održivost, drugi mirovinski stup*

Abstract: *The countries of ex-Yugoslavia inherited pension systems that faced many challenges as a result of socio-economic conditions and demographic pressures. Reforms of the pension system were on the agenda since the early stages of transition from central planning to market-oriented economies. Most of the countries in the region have implemented structural pension reforms, and some introduce compulsory pension funds whose role is being questioned because the systems are unsustainable in the long term. This paper gives an overview of the structure of pension systems with an emphasis on individual capitalized savings, focusing on 6 economies: Bosnia and Herzegovina, Montenegro, Croatia, Macedonia, Slovenia and Serbia.*

Keywords: *Pension system, Ex-Yu Countries, Sustainability, Second Pension Pillar*

1. UVOD

Ciljevi koji se stavljaju pred mirovinske sustave neke zemlje jesu veća socijalna sigurnost koja se prvenstveno osigurava kroz veće mirovine te smanjivanje rizika od starosti, smrti i invalidnosti. Ostale funkcije podrazumijevaju ravnomjernu raspodjelu dohotka tijekom životnog ciklusa i smanjivanje rizika od siromaštva u trećoj životnoj dobi, odnosno za doba u kojem pojedinci više ne participiraju na tržištu rada. Mirovinski sustavi zemalja koji osim sustava međugeneracijske solidarnosti imaju i sustav individualne kapitalizirane štednje uključuju i neke druge ciljeve. Tako se proširuje njihova uloga koja podrazumijeva rast individualne i nacionalne štednje, razvoj tržišta kapitala koji posredno može dovesti do dinamiziranja investicijske potrošnje i gospodarskog rasta te povećanja životnog standarda [1].

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Sve zemlje jugoistočne Europe su devedesetih godina prošloga stoljeća prolazile kroz tranziciju gospodarstva iz socijalizma u kapitalizam pa su se nametnula pitanja i problemi vezani za mirovine, održivost mirovinskih sustava i njihovu adekvatnost. Brojni su čimbenici utjecali na teškoće s kojima su se mirovinski sustavi ovih zemalja susretali i s kojima se i dalje suočavaju. Među najčešćim razlozima spominju se neodgovarajući omjer broja umirovljenika i radnika, pokazatelja koji se niz godina pogoršava u većini ovih zemalja; zatim velik broj niskih mirovina, koje ne omogućavaju umirovljenicima financijsku sigurnost i stabilnost, štoviše dovode ih u siromaštvo. Problem također čine velika izdvajanja za mirovinsko osiguranje, prerani odlasci u mirovinu, prijevremene mirovine i prekratak radni staž, povećanje očekivanog trajanja života i time dugotrajno korištenje mirovinskih prava, starenje stanovništva, opadanje stope fertiliteta, negativne neto migracije te niska stopa zaposlenosti. Zadnjih godina u zemljama bivše Jugoslavije prisutan je trend iseljavanja mladog i radno sposobnog stanovništva u zemlje Europske Unije i šire. Problem se s godinama povećava kako se tržišta razvijenih zapadno i sjevernoeuropskih zemalja otvaraju za priljev radne snage iz spomenutih zemalja [2] [3].

Spomenuti izazovi koji su se pojavili pred mirovinskim sustavima zemalja jugoistočne Europe doveli su do nužnosti provođenja reformi u samim sustavima, kako bi oni postali dugoročno održivi. Dvije su vrste reformi koje se mogu provesti: prilagodba postojećih sustava (blaža verzija, politički prihvatljivija i jednostavnija za provesti) i radikalna promjena. Prilagodba postojećih sustava uključuje dob i zahtjeve za stažem pri umirovljenju, vremensko razdoblje obračuna mirovine, pooštrene kriterije za dobivanje invalidske i prijevremene mirovine, promjenu indeksacije mirovina, promjenu formule za utvrđivanje visine mirovine i ostalo. Radikalna promjena podrazumijeva uvođenje drugog mirovinskog stupa, to jest sustava individualne kapitalizirane štednje za mirovinu u mirovinskim fondovima [2] [3].

Cilj je ovoga rada dati sažeti pregled mirovinskih sustava u šest zemalja bivše Republike, s posebnim osvrtom na ulogu tzv. drugog stupa. Nakon uvodnog dijela, u drugom poglavlju analiziraju se osnovni gospodarski pokazatelji i značajke mirovinskih sustava. Potom se u trećem poglavlju proučava štednja u obveznim mirovinskim fondovima, dok četvrto poglavlje predstavlja zaključak rada.

2. PREGLED MIROVINSKIH SUSTAVA U ZEMLJAMA BIVŠE JUGOSLAVIJE

Mirovinski sustavi zemalja bivše Jugoslavije pokazuju mnoge sličnosti – uvelike se oslanjaju na prvi stup mirovinskog osiguranja te imaju sličnu dijagnozu problema. Karakterizira ih visok udio invalidskih mirovina, djelomično zbog ratnih zbivanja u 90-im godinama i zbog nekompetencije javnih službi. Također, mirovinski sustav je jedinstven za zaposlene u privatnom i javnom sektoru, kao i samozaposlene i poljoprivrednike. Zemlje EU imaju drugačiju praksu. Podaci u Tabeli 1 pokazuju kako je BDP u odnosu na pretkriznu 2008. godinu značajno veći jedino u Makedoniji, dok Hrvatska još nije nadoknadila zaostatak. Javni dug je veći od 60% BDP-a u svim promatranim zemljama izuzev BiH, a stopa nezaposlenosti veoma visoka, osim u Sloveniji i odnedavno u Hrvatskoj. Omjer zavisnosti starije populacije je ispod europskog prosjeka (29,9%) u svim zemljama osim u Hrvatskoj [4]. Održivost mirovinskih sustava dodatno otežava odseljavanje stanovništva koje je predočeno negativnim stopama neto migracija. Imigracije su veće od emigracija jedino u Sloveniji, dok se u preostalim gospodarstvima stopa kreće od oko -1% do gotovo -10% u 2018. godini. Negativna razlika između imigracija i emigracija uzrokuje smanjenje broja radnika koji uplaćuju sredstva za mirovinski sustav, čime se povećava jaz u državnom proračunu između prihoda od doprinosa i rashoda za mirovine pa se države moraju zaduživati radi financiranja mirovina.

Tabela 1: Odabrani socioekonomski pokazatelji u 2017. godini [4] [5] [6]

| <i>Zemlja</i> | <i>BDP (2008.=100)</i> | <i>Javni dug (% BDP)</i> | <i>Stopa nezaposlenosti</i> | <i>Omjer zavisnosti starih</i> | <i>Očekivani životni vijek pri rođenju</i> | <i>Stopa neto migracije*</i> |
|---------------------|----------------------------|--------------------------------------|---------------------------------|--|--|----------------------------------|
| Bosna i Hercegovina | 111,11 | 41,0% | 25,56% | 23,91% | 76,90 | -9,21 |
| Crna Gora | 113,71 | 67,5% | 16,07% | 21,99% | 77,27 | -0,99 |
| Hrvatska | 95,98 | 78,4% | 11,21% | 30,07% | 76,10 | -1,57 |
| Makedonija | 119,63 | 39,3% | 22,38% | 18,93% | 76,40 | -0,85 |
| Slovenija | 103,11 | 75,4% | 6,56% | 28,89% | 78,30 | 1,59 |
| Srbija | 103,92 | 61,5% | 14,10% | 26,24% | 75,70 | -2,28 |

* Odnosi se na 2018. godinu.

Udio prosječne mirovine u prosječnoj plaći vidljiv je u Tabeli 2. Najniži je u Hrvatskoj (38,22%), a najviši u Makedoniji (57,88%). Kako su prosječne plaće relativno niske osim u Sloveniji, to navodi na zaključak da je realna kupovna moć prosječne mirovine mala, odnosno nedostatna za pristojan život. Doprinosi za mirovinsko osiguranje su najviši u Sloveniji (24,35% bruto plaće), a najniži u Makedoniji (12% za prvi stup i 6% za drugi stup). Drugi stup mirovinskog osiguranja imaju jedino Hrvatska i Makedonija, dok treći stup postoji u svim promatranim zemljama osim Federaciji BiH. Bitno je napomenuti kako se sadašnje mirovine ne pokrivaju u cijelosti tekućim doprinosima osiguranika, već se manjak pokriva transferima iz državnog proračuna. Ti transferi su najveći u Hrvatskoj gdje se tek nešto više od pola rashoda pokriva prihodima od doprinosa. Federacija BiH s druge strane prima mnogo manje transfere, odnosno mirovinski sustav je znatno održiviji u dugom roku. Veliki transferi potrebni za održavanje mirovina izvor su deficita državnih proračuna i rasta javnog duga.

Tabela 2: Karakteristike mirovinskih sustava [7]

| <i>Zemlja</i> | <i>Udio prosječne mirovine u prosječnoj plaći</i> | <i>Udio doprinosa u ukupnim prihodima I. stupa</i> | <i>Doprinosi I. stup, u postocima</i> | <i>Doprinosi II. stup, u postocima</i> | <i>III. stup, dobrovoljni</i> |
|--|---|--|---|--|-----------------------------------|
| Bosna i Hercegovina – Federacija BiH | 44,34% | 87% | DB, 23 | - | Nema |
| Bosna i Hercegovina – Republika Srpska | 41,23% | 78,63% | DB, 18,5 | - | Ima |
| Crna Gora | 56,65% | 60,61% | DB, 20,5 | - | Ima |
| Hrvatska | 38,22% | 53,76% | DB, 15 | 5 | Ima |
| Makedonija | 57,88% | 55,6% | DB, 12 | 6 | Ima |
| Slovenija | 55,43% | 67,3% | DB, 24,35 | - | Ima* |
| Srbija | 52,20% | 56,9% | DB, 26 | - | Ima |

* Obvezan za opasne i teške fizičke poslove.

Tabela 3 prikazuje strukturu mirovina zemalja bivše Jugoslavije. Udio starosnih mirovina je nizak, a udio invalidskih visok. Uzrok visokih invalidskih mirovina su ratne devedesete godine

prošlog stoljeća, ali i nekompetencija javnih službi u zaustavljanju rasta mirovina koje nisu starosne, odnosno prijevremene s odgovarajućim godinama staža.

Tabela 3: Struktura i relativni značaj mirovina u 2017. godini [7]

| <i>Zemlja</i> | <i>Starosne mirovine</i> | <i>Invalidske</i> | <i>Obiteljske</i> | <i>Udovac/udovica</i> |
|--|--------------------------|-------------------|-------------------|-----------------------|
| Bosna i Hercegovina Federacija BIH | 51,24 | 19,17 | 29,59 | - |
| Bosna i Hercegovina – Republika Srpska | 53,77 | 15,89 | 30,34 | - |
| Crna Gora | 54,32 | 20,03 | 25,65 | - |
| Hrvatska | 63,17 | 16,88 | 19,95 | - |
| Makedonija | 60,86 | 13,26 | 25,88 | - |
| Slovenija | 70,95 | 13,86 | 7,10 | 8,09 |
| Srbija | 61,31 | 18,00 | 20,69 | - |

Visok udio mirovina u BDP-u jasan je pokazatelj izazova koji se stavljaju pred mirovinske sustave ovih zemalja. Udjeli se kreću između 9,4% za Federaciju BIH i 13,1% za Srbiju. Sve zemlje osim Makedonije imaju nizak omjer umirovljenika i radnika, što je još jedan pokazatelj koji upućuje na neodrživost sustava. Projekcije govore o dodatnom smanjenju ovog omjera, koji je u nekim zemljama već sada blizu 1:1. Zakonska dob za redovno umirovljenje je najviša u Crnoj Gori i iznosi 67 godina. Prijevremene mirovine zahtijevaju barem 35, odnosno 40 godina radnog staža, izuzev u Makedoniji.

Tabela 4: Indikatori mirovinskih sustava u 2017. godini [4] [5] [7]

| <i>Zemlja</i> | <i>Rashodi za mirovine (% BDP)</i> | <i>Omjer umirovljenika i radnika</i> | <i>Zakonska dob umirovljenja (žene)</i> | <i>Prijevremena mirovina – muškarci – dob (min. godine staža)</i> | <i>Prijevremena mirovina – žene – dob (min. godine staža)</i> |
|------------------|------------------------------------|--------------------------------------|---|---|---|
| Federacija BIH | 9,40% | 1 : 1,13 | 65 | 40 god staža | 40 god staža |
| Republika Srpska | 10,61% | 1 : 1,13 | 65 | 60 (40) | 58 (35) |
| Crna Gora | 10,90% | 1 : 1,54 | 67 | 62 (15) | 62 (15) |
| Hrvatska | 11,20% | 1 : 1,15 | 65 (61,5)* | 60 (35) | 56,5 (35) |
| Makedonija | 10,40% | 1 : 1,80 | 64 (62) | 64 (15) | 62 (15) |
| Slovenija | 10,89% | 1 : 1,37 | 63 (59) | 59 (40) | 59 (39) |
| Srbija | 13,10% | 1 : 1,14 | 65 (61) | 56 (40) | 55 (37) |

*Od siječnja 2031. do siječnja 2038. uvjet za mirovinu će se godišnje povećavati za tri mjeseca, dok ne dosegne 67 godina starosti.

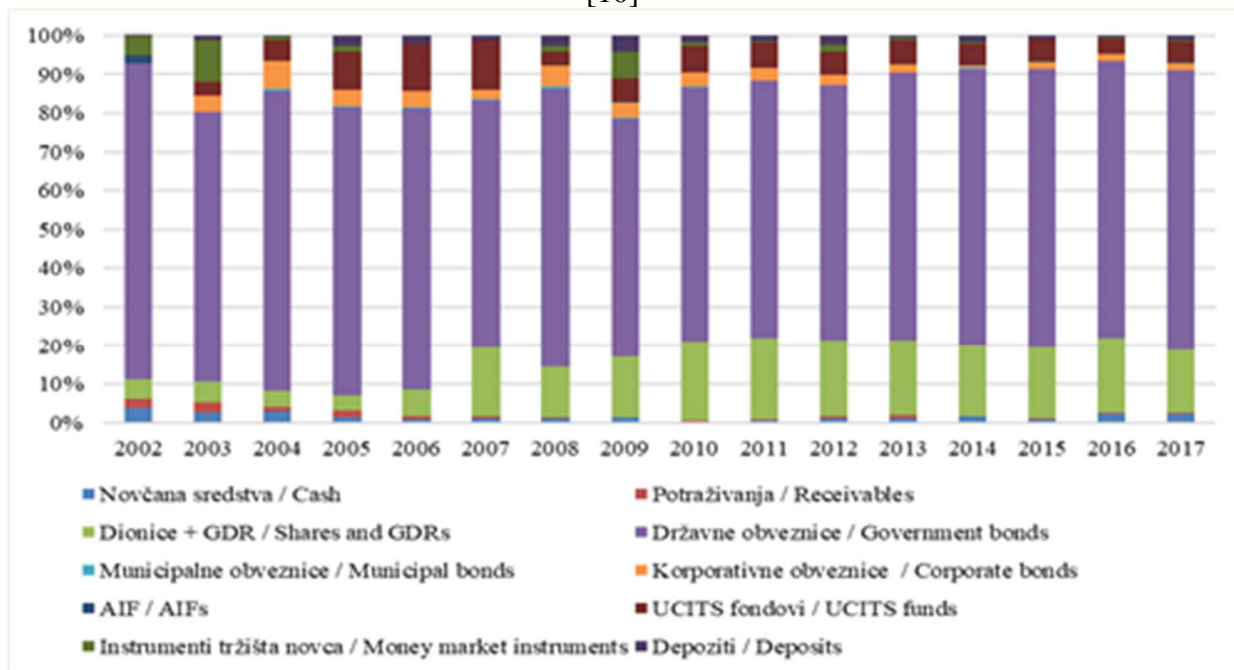
3. PERSPEKTIVA INDIVIDUALNE KAPITALIZIRANE ŠTEDNJE

Kapitalizirana individualna mirovinska štednja dobila je na značaju početkom 21. stoljeća i u zapadnim razvijenim zemljama i zemljama u razvoju poput zemalja Latinske Amerike i postsocijalističkih europskih gospodarstava. Potonji su bili pod utjecajem modela Svjetske banke s tri stupa. Ovaj je model implementiran u više od 30 zemalja, uključujući 12 zemalja srednje i jugoistočne Europe (Bugarska, Češka, Estonija, Mađarska, Kosovo, Latvija, Litva,

Makedonija, Poljska, Rumunjska, Slovačka i Slovenija). Globalna financijska i gospodarska kriza dovela je do preispitivanja uloge ovog stupa mirovinskog osiguranja zbog neprimjerenog izlaganja izvedenicama što je uzorkovalo eroziju povjerenja i propadanje znatnog dijela imovine mirovinskih fondova [8]. Postoje promjene u obveznim mirovinskim fondovima u obliku povrata (Mađarska), djelomičnog povrata/redukcije (Poljska), smanjenih doprinosa (Slovačka, Estonija, Latvija, Litva, Rumunjska), ali i bez promjene (Hrvatska, Bugarska, Makedonija, Kosovo) ili nastavka reformi drugog stupa (Češka) [9].

U hrvatski sustav mirovinskog osiguranja 2002. godine je uvedeno obvezno izdvajanje u II. stup u iznosu od 5% doprinosa iz bruto plaće za sve osiguranike koji su bili mlađi od 40 godina te istovremeno i mogućnost dobrovoljne štednje u trećem stupu. Radnici koji su u tome trenu bili stariji od 40 godina nisu bili obvezni uplaćivati u drugi mirovinski stup, ali su se mogli odlučiti za tu opciju. Izuzimanje 5% doprinosa iz javnog, prvog stupa koji je do tada jamčio isplatu mirovina na temelju solidarnosti i njegovo prenošenje u privatne fondove radi kapitalizirane štednje, smatralo se optimalnim rješenjem za mirovinski sustav i načinom osiguranja znatno boljih mirovina za mlade generacije. Nakon uspostave Središnjeg registra osiguranika (REGOS), na tržištu se pojavljuju četiri mirovinska fonda koja postoje i danas: AZ obvezni mirovinski fond, PBZ/Croatia osiguranje obvezni mirovinski fond, Erste plavi obvezni mirovinski fond i Raiffeisen obvezni mirovinski fond. Imovina mirovinskih fondova u 2017. godini čini oko 16,24% ukupne aktive financijskog sustava i bilježi konstantan rast. Neto imovina fondova koji upravljaju individualnom kapitaliziranom štednjom je na dan 31. prosinca 2017. godine iznosila gotovo 92 milijarde kuna [10], a jednako kao i ostali institucionalni investitori u Hrvatskoj, većinu imovine ulažu u državne vrijednosnice. Slika 1. prikazuje promjenu strukture ulaganja obveznih mirovinskih fondova u Hrvatskoj u razdoblju od 2002. do 2017. godine.

Slika 1: Struktura ulaganja hrvatskih obveznih mirovinskih fondova od 2002. do 2017. godine [10]



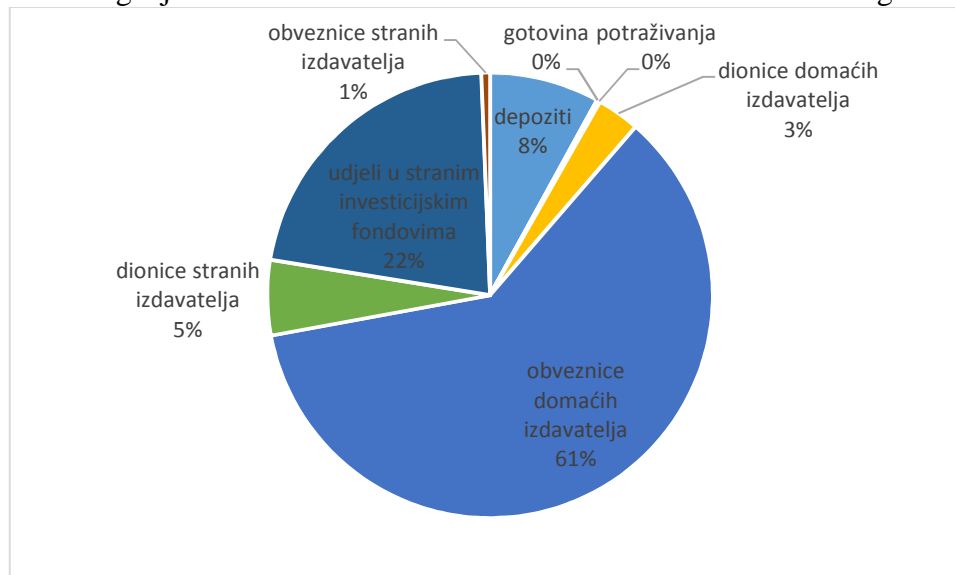
Na Slici 1. vidljivo je da se od osnutka obveznih mirovinskih fondova 5% izdvojenog doprinosa usmjerava poglavito u državne obveznice, dok je tek nakon 2007. godine zamjetan rast značaja nekog drugog oblika imovine, dionica. Govoreći o domaćoj imovini, u 2017. godini 80,67%

činile su državne obveznice te potom slijede dionice sa 12,06%. S druge strane, kod inozemne imovine najvažniji oblik su dionice sa 52,62% relativnog udjela, a UCITS fondovi zauzimaju 42,48% ukupne strane imovine [10].

Osim Republike Hrvatske, samo još jedna zemlja bivše Jugoslavije ima obveznu individualnu kapitaliziranu mirovinsku štednju - Makedonija. Reforma mirovinskog sustava Makedonije započela je 2005. godine. Tijekom procesa provođenja reforme makedonske institucije su primile punu pomoć i suradnju od Svjetske banke te je mirovinski sustav temeljen na standardnom sustavu od tri mirovinska stupa. Prvi stup uključuje mirovine čija je formula jasno propisana, invalidske mirovine, mirovine za preživjele iz ratova Jugoslavije i minimalnu mirovinu. U drugi stup su automatski uključeni osiguranici koji se prvi put zapošljavaju sa 1. siječnjom 2003. godine, dok oni zaposleni prije tog datuma mogu izabrati hoće li participirati u oba stupa ili samo u prvom. Stopa doprinosa iznosi 18% bruto plaće, od čega 12% bruto plaće odlazi u prvi stup, a 6% u drugi stup.

Govoreći o investiranju sredstava iz drugoga stupa, makedonski mirovinski fondovi imaju sličnu strategiju ulaganja imovine kao hrvatski fondovi. Struktura ulaganja obveznih mirovinskih fondova u Makedoniji vidljiva je na Slici 2.

Slika 2: Ulaganje makedonskih obveznih mirovinskih fondova u 2017. godini [11]



Većina portfelja (61%) uložena je u obveznice domaćih izdavatelja – primarno obveznice Ministarstva financija. Druga kategorija ulaganja po veličini su udjeli u stranim investicijskim fondovima (22%), a sve ostale kategorije ulaganja zajedno ne prelaze 10% (dionice stranih izdavatelja 5%, dionice domaćih kompanija 3%, gotovina i potraživanja svaki po manje od 1%). Jednako kao i kod hrvatskih fondova, i u Makedoniji je većina njihove imovine uložena u državne obveznice, što je nužno zbog načela sigurnosti, ali suboptimalno s aspekta povrata.

4. ZAKLJUČAK

Dizajn mirovinskog sustava i njihova razina održivosti varira od zemlje do zemlje, također među zemljama sa sličnim gospodarskim razvojem i tradicijama. Na temelju analize šest zemalja iz jugoistočne Europe mogu se donijeti neki zaključci. Mirovinski sustavi u najvećoj se proporciji oslanjaju na međugeneracijsku solidarnost, dvije zemlje imaju i individualnu

kapitaliziranu štednju, dok gotovo sve nude i dobrovoljnu mirovinsku štednju. Kao posljedica ratova i neefikasnog upravljanja, udio invalidskih i prijevremenih mirovina je visok, što otežava postizanje održivosti sustava, a neodrživost dodatno potencira rastući trend iseljavanja. U svim zemljama potrebno je destimulirati prerani odlazak u mirovinu, što će doprinijeti smanjenju pritiska na državni proračun. Govoreći o Hrvatskoj i Makedoniji, s obzirom na strukturne probleme mirovinskih sustava i nepovoljne demografske projekcije, ali i činjenicu da se kapitalizirana individualna mirovinska štednja pokazala lošom odlukom u mnogim zemljama, potrebno je ispitati njen učinak na održivost sustava.

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NEGATIVNA DEMOGRAFSKA KRETANJA KAO OGRANIČAVAJUĆI FAKTOR GOSPODARSKOG I DRUŠTVENOG RAZVOJA REPUBLIKE HRVATSKE

NEGATIVE DEMOGRAPHIC TRENDS AS A RESTRICTED FACTOR OF ECONOMIC AND SOCIAL DEVELOPMENT OF THE REPUBLIC OF CROATIA

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Sažetak: *Negativni demografski trendovi, neuravnotežen regionalni razvitak Republike Hrvatske, smanjenje i starenje stanovništva, posredno postaju ograničavajućim faktorom održivosti gospodarskog i društvenog razvoja.*

Razvoj stanovništva je važna determinanta gospodarskog razvoja, ne samo preko promjena što nastaju u ukupnom broju stanovnika, već i preko promjena koje nastaju u pojedinim strukturama stanovništva koje se posebno očituju u smanjenom broju učenika i studenata, a time i ukupnih ljudskih i ekonomskih potencijala u budućnosti.

Zbog složenosti i međuovisnosti mnogobrojnih faktora koji utječu na demografska kretanja, efikasna populacijska politika zahtijeva sveobuhvatni dugoročni pristup te nadzor, koordinaciju i praćenje rezultata provedbe politika u različitim resorima koji mogu imati učinak na demografska kretanja.

Ključne riječi: *Demografska kretanja, gospodarski i društveni razvoj*

Summary: *Negative demographic trends, unbalanced regional development of the Republic of Croatia, decline and aging of the population, indirectly become a constraining factor of sustainability of economic and social development.*

The development of the population is an important determinant of economic development, not only through the changes that arise in the total population, but also through the changes that occur in the particular structures of the population, which are manifested in the diminished number of pupils and students and thus of the total human and economic potential in the future.

Due to the complexity and interdependence of many factors affecting demographic trends, effective population policy requires a comprehensive long-term approach, as well as monitoring, coordination and monitoring of policy implementation results in different areas that may have an impact on demographic trends.

Keywords: *Demographic trends, economic and social development*

⁷ Veleučilište „Lavoslav Ružička“ u Vukovaru, Hrvatska

1. UVOD

U očitom sukobu tradicionalnih i neoliberalnih vrijednosti, a nakon ulaska u Europsku uniju, Hrvatska se odrekla mnogih tradicionalnih vrijednosti kroz nadnacionalno pravo Europske unije ali vrijednosti propisane u tom pravu većinski narod nikada nije prihvatio u vrijednosnom i kulturološkom smislu, zajednička vanjska i gospodarska politika ne ide u korist Hrvatske kao male države, rezultate takvog stanja koriste velike razvijene države a Hrvatska nije uspjela iskoristiti prednosti članstva u EU.

Pozitivna su nastojanja Vlade da povlači što više novca iz strukturnih fondova EU, međutim taj novac ne daje željene rezultate zbog nepovoljne strukture prijavljenih odnosno odobrenih projekata u smislu da se najveći dio njih odnosi na infrastrukturne projekte koje bitno ne utječu na standard stanovništva.

Sva nastojanja i sve državne politike ne ostavljaju dubljeg traga jer se svi procesi više-manje odvijaju stihijski i ne postižu očekivane rezultate, pa tako niti jedna reforma nije završila s uspjehom. Razne mjere, pogotovo u smislu razvoja digitalnog društva i nesuvislih priča o reformi javne uprave daju privid razvoja i osjećaj da stalno traje predizborna kampanja.

Međutim, ustavni položaj područne odnosno regionalne uprave i samouprave i lokalne samouprave je takav da dugoročno šteti svakom napretku.

Politika plaća je jedan od ključnih problema u zaostajanju za razvijenim svijetom i općem padu standarda i razlog ekonomskog migriranja hrvatskog stanovništva.

Država gubi ekonomski potencijal kroz nedostatak radne snage tako da se u Hrvatskoj više ne radi o zadržavanju deficitarnih nego svih kadrova, uključujući i pomoćne, nekvalificirane radnike. I to ne samo u privatnom, nego i u javnom sektoru. Na mnogim poslovima državne i javnih službi neki radnici ne mogu ni u mirovinu, iako su za to stekli uvjete, jer nema novih radnika koji bi ih željeli zamijeniti. A drugi pak daju otkaze i odlaze ili u privatni sektor ili u inozemstvo. Male plaće i loši radni uvjeti odbijaju ljude od velikog djela poslova u državnoj i javnim službama.

2. LOKALNA I PODRUČNA (REGIONALNA) SAMOUPRAVA

U Zakonu o lokalnoj i područnoj (regionalnoj) samoupravi⁸ propisano je da je Općina jedinica lokalne samouprave koja se osniva, u pravilu, za područje više naseljenih mjesta koja predstavljaju prirodnu, gospodarsku i društvenu cjelinu, te koja su povezana zajedničkim interesima stanovništva.

Istim zakonom propisano je da je Grad jedinica lokalne samouprave u kojoj je sjedište županije te svako mjesto koje ima više od 10.000 stanovnika, a predstavlja urbanu, povijesnu, prirodnu, gospodarsku i društvenu cjelinu. U sastav grada kao jedinice lokalne samouprave mogu biti uključena i prigradska naselja koja s gradskim naseljem čine gospodarsku i društvenu cjelinu te su s njim povezana dnevnim migracijskim kretanjima i svakodnevnim potrebama stanovništva od lokalnog značenja, a Grad Zagreb, kao glavni grad Republike Hrvatske, posebna je i jedinstvena, teritorijalna i upravna cjelina kojoj se ustrojstvo uređuje Zakonom o Gradu Zagrebu.

⁸ (Narodne novine br. 33/01., 60/01., 129/05., 109/07., 125/08., 36/09., 150/11., 144/12., 19/13. – pročišćeni tekst, 137/15. – isp. i 123/17.)

U Ustavu Republike Hrvatske⁹, Poglavlju VI „Mjesna, lokalna i područna (regionalna) samouprava“, člankom 133. propisano je da se građanima jamči pravo na lokalnu i područnu (regionalnu) samoupravu; pravo na samoupravu ostvaruje se preko lokalnih, odnosno područnih (regionalnih) predstavničkih tijela koja su sastavljena od članova izabranih na slobodnim i tajnim izborima na temelju neposrednog, jednakog i općega biračkog prava; a u članku 134. Ustava propisano je da su jedinice lokalne samouprave općine i gradovi i njihovo područje određuje se na način propisan zakonom, a jedinice područne (regionalne) samouprave su županije.

U Republici Hrvatskoj ustrojeno je ukupno 555 jedinica lokalne samouprave, i to 428 općina i 127 gradova te 20 jedinica područne (regionalne) samouprave, odnosno županija. Grad Zagreb, kao glavni grad Republike Hrvatske, ima poseban status grada i županije, tako da je u Republici Hrvatskoj sveukupno 576 jedinica lokalne i područne (regionalne) samouprave, a ako tome još dodamo urede državne uprave po županijama, stvar je naprosto neodrživa.

Ako uzmemo da je Republika Hrvatska pala ispod četiri milijuna stanovnika, da Grada Zagreb ima jedan milijun, pa ostatak od tri milijuna podijelimo s 575 dobijemo brojku od 5.217 stanovnika po jednoj jedinici, iz čega je vidljivo da one nemaju ekonomski potencijal i da bi dvije trećine odmah trebalo ukinuti.

Svaka ta jedinica ima župana, odnosno gradonačelnika, odnosno načelnika općine, sa svim suradnicima, logistikom i troškovima, oni su većinom i čelni ljudi političkih stranaka, a ti čelnici svojim političkim utjecajem blokiraju svaku ozbiljniju reformu svojim utjecajem na središnju vlast, pogotovo u odnosu na činjenicu da zbog odnosa političkih snaga nije moguće dobiti dvotrećinsku većinu u parlamentu za ustavne promjene u pogledu ukidanja županija.

3. POLITIKA PLAĆA

Nakon višegodišnjeg mrtvila na tržištu rada u posljednje vrijeme svjedočimo nestašici radne snage i osjetnijem rastu plaća. U tablici su prikazane prosječne neto plaće (II/2017. – II/2018) u pojedinim djelatnostima iz koje je vidljivo koja su zanimanja najviše profitirala zbog sve naglašenije nestašice radne snage.

⁹ (Narodne novine br. 85/2010 – pročišćeni tekst)

Tabela 1. Prosječne neto plaće u Hrvatskoj

| PROSJEČNE NETO PLAĆE | | | |
|---|--------------|--------------|---------------------|
| Djelatnost | II. 2017. | II. 2018. | II. 2018./II. 2017. |
| J Informacije i komunikacije | 8.070 | 8.539 | 5,8% |
| K Financijske djelatnosti i djelatnosti osiguranja | 8.199 | 8.233 | 0,4% |
| D Opskrba električnom energijom, plinom, parom | 7.611 | 7.905 | 3,9% |
| B Rudarstvo i vađenje | 6.913 | 7.227 | 4,5% |
| O Javna uprava i obrana; obvezno socijalno osiguranje | 6.839 | 7.103 | 3,9% |
| M Stručne, znanstvene i tehničke djelatnosti | 6.654 | 7.058 | 6,1% |
| Q Djelatnosti zdravstvene zaštite i socijalne skrbi | 6.822 | 7.054 | 3,4% |
| P Obrazovanje | 6.327 | 6.556 | 3,6% |
| Nacionalni prosjek | 5.894 | 6.128 | 4,0% |
| H Prijevoz i skladištenje | 5.901 | 6.052 | 2,6% |
| L Poslovanje nekretninama | 5.753 | 5.824 | 1,2% |
| R Umjetnost, zabava i rekreacija | 5.562 | 5.751 | 3,4% |
| E Opskrba vodom; uklanjanje otpadnih voda | 5.462 | 5.571 | 2,0% |
| C Prerađivačka industrija | 5.454 | 5.513 | 1,1% |
| S Ostale uslužne djelatnosti | 5.178 | 5.480 | 5,8% |
| G Trgovina na veliko i malo; popravak motornih vozila i motocikla | 5.157 | 5.458 | 5,8% |
| A Poljoprivreda, šumarstvo i ribarstvo | 4.982 | 5.101 | 2,4% |
| F Građevinarstvo | 4.783 | 5.097 | 6,6% |
| I Djelatnosti pružanja smještaja te pripreme i usluživanja hrane | 4.893 | 5.049 | 3,2% |
| N Administrativne i pomoćne uslužne djelatnosti | 4.158 | 4.749 | 14,2% |

Izvor: Državni zavod za statistiku (2018.)

Jedan od ključnih faktora negativnih demografskih kretanja je dugogodišnja politika plaća. Više od dva desetljeća zaostajanja u povećanju plaća pravdana su troškovima rata i poratne obnove, na što su se nastavile posljedice pogrešnih politika, strukturnog i tehnološkog zaostajanja i u tom pogledu nije moguće ništa promijeniti, kao niti zaustaviti ili nadoknaditi vrijeme.

Razne Vlade u kontinuitetu vladanja podizale su ogromne kredite s nepovoljnim kamatama i svaka od njih sljedećoj ostavljale su ogromne obveze prema međunarodnim kreditorima, izdavale su velika rizična državna jamstva kao ogroman teret državnom budžetu, dokapitalizirale su bankarski sustav pa jeftino prodavale banke stranim bankarskim grupacijama, zadržale veliki porez na rad, tako da je sve to oslabilo potencijal države i gospodarstva u smislu bržeg rasta plaća i podizanja standarda stanovništva.

Politika plaća jedan je od ključnih faktora odnosno uzroka osjećaja razočaranosti i besperspektivnosti građana koji svoju sreću i stabilnost traže u državama Europske unije s obzirom da objektivnom dinamikom njihova rasta nije moguće uhvatiti korak za razvijenim svijetom.

4. OVRŠNI ZAKON

Ovršnim zakonom¹⁰ uređuje se postupak po kojemu sudovi i javni bilježnici provode prisilno ostvarenje tražbina na temelju ovršnih i vjerodostojnih isprava (ovršni postupak) te postupak po kojemu sudovi i javni bilježnici provode osiguranje tražbina (postupak osiguranja), ako posebnim zakonom nije drukčije određeno a istim se uređuju i materijalno pravni odnosi koji se zasnivaju na temelju ovršnih postupaka i postupaka osiguranja. Međutim, stanje u Republici

¹⁰ (Narodne novine br. 112/12., 25/13., 93/14., 55/16. – Odluka Ustavnog suda Republike Hrvatske i 73/17.)

Hrvatskoj pokazuje da nije ostvaren duh zakona u pogledu pravednosti zakona i ostvarenja njegove temeljne svrhe. Ovršni postupak kad pogledamo u cjelini i njegov učinak na hrvatsko društvo u praksi, može se zaključiti da isti nije ostvario svoju zakonsku svrhu naplate vjerovnika već je on pretvoren u privatni biznis. U većini slučajeva uopće se nisu naplaćivala dugovanja već samo zatezne kamate i umjetno stvoreni troškovi tako da on u praksi služi za enormnu zaradu određenih javnih bilježnika i odvjetnika. Krajem lipnja 2018. g. Financijska agencija¹¹ (FINA) je objavila novo izvješće o broju građana u blokadi navodeći da se 30. lipnja 2018. godine u blokadi nalazilo 323.758 građana s ukupnim dugom, bez kamata, od 43 milijarde i 810 milijuna kuna.

Najviše je dužnih u glavnom gradu zemlje, Zagrebu – njih 62.018 duguje 12.2 milijarde kuna. Broj blokiranih u odnosu na kraj 2016. smanjen je za 2.167, dok se njihov dug povećao za 1.02 milijarde kuna, objavila je Fina.

Krajem lipnja bilo je blokirano 11.54 posto radno sposobnog stanovništva Zagreba.

Splitsko-dalmatinska županija ima 30.772 blokiranih građana koji sveukupni duguju nešto više od četiri milijarde kuna. Pritom udio blokiranih građana u broju radno sposobnog stanovništva iznosi 10.09 posto.

Zagrebačka županija broji 26.007 ljudi s blokiranim računima, oni duguju ukupno 3.9 milijardi kuna, a to čini udio od 12 posto u broju radno sposobnog stanovništva.

Najmanje je blokiranih krajem lipnja, prema podacima Fina-e bilo u Ličko-senjskoj županiji. Dug građana iznosio je 277.3 milijuna kuna, dok je njihov udio u radno sposobnom stanovništvu županije 9.1 posto.

U odnosu na ukupan broj stanovnika najviše je blokiranih u Koprivničko-križevačkoj (9.6 posto) i Sisačko-moslavačkoj županiji (9.3 posto). Obje su županije na vrhu i prema kriteriju broja blokiranih u odnosu na radno sposobno stanovništvo.

Na listi od 25 gradova s najvećim brojem blokiranih građana vrh drže Zagreb, Split, Rijeka, Osijek i Zadar. U Zagrebu je 62.018, u Splitu 12.170, u Rijeci 10.118, u Osijeku 8.631, a u Zadru 5.431 blokirana građana. Na dnu liste nalaze se Vukovar s 2.300 blokiranih, Koprivnica s 2.281 te Dugo Selo s 1.980 blokiranih građana.

Prema udjelu blokiranih građana u broju radno sposobnog stanovništva za 25 gradova na rang listi kreiranoj prema kriteriju iznosa duga građana izdvajaju se Križevci sa 17-postotnim udjelom, a slijede Benkovac i Dugo Selo sa 16.7 posto.

Nakon što su Vlada Republike Hrvatske odnosno hrvatski parlament donijelo niz zakona radi olakšanja stanja dužnicima kroz Zakon o oprostima dugova koji je imao minoran učinak, Zakon o osobnom stečaju potrošača s odgodom primjene i još nekih zakona, broj blokiranih građana je prividno opao ali ne zbog podmirenja duga već skidanja iz evidencije Financijske agencije, dok dug i dalje ostaje u vlasti vjerovnika, tako da podaci Fina-e pokazuju da je krajem kolovoza 2018. godine, zbog neizvršenih osnova za plaćanje u blokadi bilo 274.529 građana, s ukupnom glavnicom duga od 19,2 milijarde kuna, kao i 20.826 poslovnih subjekta, s glavnicom duga od 7,9 milijardi kuna.

¹¹ Izvor: Financijska agencija Republike Hrvatske

Pribroje li se kamate od 7,3 milijarde kuna, ukupan dug blokiranih građana s 31. kolovoza iznosi 26,5 milijardi kuna, što je 38,7 milijardi kuna manje nego krajem srpnja ove godine.

Broj blokiranih građana bio je za 43.992 ili 13,8 posto manji nego u srpnju, a vrijednost njihovih neizvršenih osnova za plaćanje (samo glavnica duga) bio je manji za 24 milijarde kuna.

Cjelokupni ovršni sustav je kompliciran i nepravedan i bitno utječe na stanje beznađa za navedeni broj stanovnika u blokadi, što zajedno s članovima njihovih obitelji čini četvrtinu ukupnog stanovništva države. Ti ljudi nemaju nikakvu šansu za život dostojan čovjeka, za normalan životni standard, za osobni razvoj i perspektivu svoje djece, pa je takav ovršni sustav jedan od ključnih razloga ekonomskih migracija mladih ljudi odnosno mladih obitelji i iseljavanja iz Hrvatske.

Istovremeno Republika Slovenija ima zakon koji je proglašen najboljim europskim ovršnim zakonom prema kojem sve ovrhe, ukupno njih devet milijuna, provodi samo šest sudaca elektroničkim putem. Da je bilo političke volje Republika Hrvatska je imala mogućnost doslovno prepisati slovensko rješenje čime bi se uvela makar minimalna pravednost u ovršne postupke, a posljedično u državnom proračunu bi bilo 2,5 milijardi kuna više, a građanima bi se naplatilo desetak milijardi kuna manje.

5. OSTALI VAŽNI POKAZATELJI UZROKA NEGATIVNIH DEMOGRAFSKIH TRENDOVA

Iz izvješća Hrvatskog zavoda za zapošljavanje¹² koje se odnosi na posljednje osvježene podatke od 10. 12. 2018. g. vidljivo je da Hrvatska ima nisku stopu nezaposlenosti kao nikada do sada, međutim rekordno niska nezaposlenost ima svoje lice i naličje. Kad se usporede brojke vezane uz smanjenje broja nezaposlenih sa brojkama povećanja broja zaposlenih vidljivo je da se negdje između nezaposlenih i zaposlenih jedan broj ljudi „izgubio“. Notorno je kako se nisu svi nezaposleni zaposlili a za pretpostaviti je da je dio zaposlen u Hrvatskoj, dio otišao u inozemstvo, dio u mirovinu, ali je i dio zbog administrativnih i drugih razloga brisan iz evidencije nezaposlenih.

U Hrvatskoj se u zadnjih dvadesetak godina promijenila i struktura poslova što je vidljivo po strukturi nezaposlenih. Dok je primjerice u pred kriznim godinama među nezaposlenima prednjačio udio onih bez sprema pa do razine strukovne škole ili neke druge srednje škole, a udio VSS bio je vrlo mali, danas je udio prve skupine u smanjenju, a udio ove druge se udvostručio. Očito je da Hrvatska klizi osim u nesigurne poslove i u poslove niže kvalifikacijske strukture.

Osim promjene strukture poslova koja sve više „preteže“ prema poslovima niže dodane vrijednosti, u posljednjih nekoliko godina drastično je povećan broj odlazaka građana iz Hrvatske na rad u inozemstvo, posebice nakon otvaranja europskih granica, odnosno otvaranja sustava rada zemalja članica EU za hrvatske radnike. Prosječno godišnje Hrvatsku napusti oko 2% njenih stanovnika. Pri tome se svi ne odjavljuju pa je tako primjetna više nego osjetna razlika u broju iseljenih građana iz Hrvatske ovisno jesu li hrvatski podatci ili podatci zemalja useljavanja. Hrvatske brojke su puno manje. Glavni „krivci“ za to masovno iseljavanje su niske plaće, nesigurni poslovi i loši uvjeti rada. Najtužnija priča kod ekonomskih migracija je što ona

¹² <https://statistika.hzz.hr/statistika.aspx?tipIzvjestaja=1>

utječe na nisku razinu nezaposlenosti a političari to prikazuju kao rezultat „uspješnih javnih politika“.

Razne političke koalicije na vlasti, zajedno s poslodavcima evidentno tu nisu vidjele problem pa su nedostatak radne snage krpali kroz uvozne kvote radnika, a danas već i ti radnici znaju kako će im u zemljama zapadne Europe plaće biti veće i standard daleko veći, pa tamo i odlaze. Tako se hrvatskim poslodavcima i političarima dugogodišnja politika niskih plaća, nesigurnih poslova i niskih radničkih prava vraća poput bumeranga i to je postao gorući državni problem.

Neovisno o najavljenim drastično uvećanim kvotama za uvoz radne snage, to ne može biti rješenje za Hrvatsku jer će ista postati zemlja čiji su građani, zbog malih plaća, nestalnih poslova i loših uvjeta rada, otišli u inozemstvo, a u zemlji su ostale tvrtke i poslovi gdje rade strani radnici. Kad govorimo o promjeni pristupa prema radnicima i njihovom radu, onda se te promjene odnose kako na privatne poslodavce tako i na državu kao poslodavca. U Hrvatskoj je nužno povećanje svih plaća i to drastično, a počevši od minimalne plaće a osobito je nužno snažno preorijentiranje na ugovore o radu na neodređeno vrijeme.

Drastični pad broja stanovnika počinje ostavljati sve vidljivije tragove i na pojedinim društvenim skupinama kao što su studenti. Tako je primjerice u akademskoj godini 2012./2013. u Hrvatskoj bilo 188.285 studenata, dakle gotovo 30.000 više nego u prošlom semestru¹³. Kada je riječ o studentima u akademskoj godini 2017./2018., broj studenata iznosio je 159.430 studenata, 80,6% bilo ih je upisano na fakultete, 13,8% na veleučilišta i 4,2% na visoke škole, dok ih je 1,4% bilo upisano na umjetničke akademije.

6. ZAKLJUČAK

Zadnje tri godine više umrlih 47.628 (plus 13.628 u prvih 10 mjeseci 2018. godine, ukupno 61.526 više umrlih nego rođenih) i 113.439 iseljenih samo po službenim podacima Državnog zavoda za statistiku. Prema podacima europskih zemalja vjerojatno i dvostruko više. Gubitak u samo tri godine gotovo 280.000 osoba. Supstitucija je istodobno na razini 36.329 osoba, kao najava dolazaka novih radnika, otvaranja granica i slobode kretanja a supstitucija kao demografska posljednja i najopasnija mjera za apsolutno male populacije kao što je Hrvatska je najopasnije rješenje kroz praktički zamjenu stanovništva.

Prirodnim putem, odnosno većim brojem umrlih od broja rođenih, od popisa iz 2011. godine do danas izgubljeno je još najmanje 65.000 osoba. Broj stanovnika tako je pao ispod psihološke granice od četiri milijuna, a do 2031., ostanu li trendovi isti, Hrvatska će pasti na 2,9 milijuna pa je očito da smanjenje i starenje stanovništva, te njegovo iseljavanje, postaju ograničavajućim faktorom održivosti gospodarskog i društvenog razvoja.

Političari svih stranaka vrlo često izgube osjećaj vremena, prostora, okruženja, potreba drugih i vrijednosnih kriterija tako da je najključnije riješiti temeljne uzroke loših demografskih kretanja i smanjivanja stanovništva a to su politička etika i slabe institucije, prvenstveno pravosuđe, jer ljudi ne bježe od siromaštva, nego prvenstveno od nepravde i nedostatka poštenja.

¹³ Prema podacima Državnog Zavoda za statistiku VIII/2018.

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RETENTION OF TITLE IN THE EUROPEAN UNION: IS THERE POSSIBILITY FOR HARMONIZATION

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Abstract: *Although there are 28 national jurisdictions in the European Union, due to the extensive process of harmonization their national rules in public domain have much in common. Private law area, on the other hand, remains mainly unaffected by this process, especially in the area of property law.*

Retention of title clause is one of the most important tools for protection of the seller's rights under the sales contract, but it arises from the nucleus of property law. It means, among other things, that it remains heavily influenced by local legal tradition. As such it can be one of the obstacles for the free movement of goods and services.

Having this in mind it is of no surprise that for the last three decades the EU has been trying to come up with the European notion of the retention of title clause. Different advantages as well as disadvantages of the cross-border relations in the area of contract law with the implications on the property law would best be met by the autonomous notion of this clause.

Despite the obvious willingness of the EU in regulating the subject matter, question remains whether the EU competences include this area. What about article 295 of the EC Treaty which seems to prevent the EU from legislative actions in the area of property law? What about numerous clauses?

Also, it may be argued that this issue has already been dealt with on the level of UNIDROIT as well as UNCITRAL, with not much success. Thus, the intention of the authors is to explore reasons for the failure of the attempted unification at global level and to explain how common European retention of title clause could lead to more secure and more certain transactions within the internal market.

Keywords: *Retention of title, European Union, harmonization, property law*

1. INTRODUCTION

In a world as globalized as we are living in an absence of a cross-border element in business transactions is more often exception than the rule. It means that in most cases business transactions will be subject to more than one legal order. While it might not be a problem regarding contractual matters due to unified European system of conflict rules, when transactions include proprietary aspects, which are still under the exclusive domain of Member States legal issues, become more complex.

Why is it so? Almost universally, rights *in rem* in cross-border cases are subject to the *lex rei sitae* rule [1]. It means that the content and the extent of rights *in rem* regarding immovables as well as movables will be judged according to the law of the state in which respective property is situated [2]. While it is obvious that this rule secures great certainty with respect to

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immovable property, this might present a big problem regarding movable property [3]. Namely, universal application of *lex rei sitae* means that each time this property moves across borders different property law applies. Since national property laws may vary greatly, this may result in a complete loss or only partial recognition of property rights acquired in the state of origin. Thus, property law is national law *par excellence* [4].

One of the most common tools in international business transactions is so called retention of title clause (RoT), closely associated with property law. This institute is well known since the ancient Romans time (*pactum reserve domini*) [6] and all European legislations are familiar with it. It is used for protection of rights of the seller in business transactions, as one of the clauses in a sale contract, which secures the seller by postponing the transfer of ownership until the buyer has paid the full price [5]. Due to its roots in the „coercive national dogmatic of property law“ it differs in many ways from one country to another [4]. As such it can be one of the obstacles to the free movement of goods and services.

Having this in mind it is of no surprise that for the last three decades the EU has been trying to come up with the European notion of the retention of title clause. Different advantages as well as disadvantages of the cross-border relations in the area of contract law with the implications on the property law would best be met by the autonomous notion of this clause.

On the other hand, some previous attempts of unification failed, such as those from UNIDROIT or UNCITRAL. Has anything changed since then? Do EU competences include the competence to unify this area of law?

The intention of the authors of this article is to explore these questions and to explain how common European retention of title clause could lead to more secure and more certain transactions within the internal market. In order to do so, we will first present some legislations which we consider typical enough to serve as a reference for our further considerations.

2. RETENTION OF TITLE IN GERMAN LAW

German law is a perfect example for research and study of retention of title clause. Interestingly, German law has scarce statutory regulation of this institute, but very rich court practice and legal doctrine, which have actually developed and shaped this institute [12].

Retention of title is commonly used tool in business transactions in Germany and most of the general terms and conditions contain this clause. It has a big importance in business transactions, and contractual practice is trying on a daily basis to make it even more useful.

The clause is articulated in Article 449 of the German Civil Code which states the following: “If the seller of a movable good has retained title until payment of the purchase price, than in the case of doubt it is to be assumed that ownership is transferred subject to the condition precedent that the purchase price is paid in full (retention of title)“ [17]. However, this is not the main rule that governs retention of title [5]. In Germany, retention of title is based on general principles of civil law, especially law of obligations and property law [5]. Contractual practice as well as court practice have developed detailed and different types of this clauses.

First type is simple or ordinary retention of title (*einfacher Eigentumsvorbehalt*). If this type of clause is agreed by the parties' condition precedent is full payment of the purchase price [5]. This type of clause is used when buyer is also a final consumer of the sold item. However, an

insight into contractual practice shows more than obvious that simple retention of title is rarely used, while enlarged or comprehensive retention of title (*erweiterter Eigentumsvorbehalt*) occur more often [12].

Enlarged retention of title means clause which secures all the obligations which the buyer has towards the seller [9]. This means that sold item is the ownership of the seller until buyer has paid all his obligations to the seller and not just the purchase price of the sold good.

The most common situation is that buyer purchases goods for its own business, but this opens the question what if good on which title is retained has been sold to a third party. Does this situation lead to the loss of retained property? According to the German court and contractual practice this is not the case.

Third type of this clause is so called extended retention of title clause (*verlängerter Eigentumsvorbehalt*). If the contract contains this type of clause it means that the buyer transfers their claims for the purchase price, which he can demand from his buyers to the seller [5]. If the business relations between the seller and the buyer have an ordinary course, the buyer will usually inform seller about all sales contracts and third-party buyers [5]. This clause has been developed according to construction of the right in anticipation (*Anwartschaftsrecht*) [12], which presupposes transfer of the anticipated right (in this case right of ownership) on the third-party buyer.

Besides these types of the retention of title clause, German law also recognizes some sub-types of this clause, which have also been developed by the contractual and court practice, such as secondary or subsequent retention of title, forwarded retention of title or retention of title for sales to different companies belonging to seller (*Konzernvorbehalt*) [14].

Speaking about court practice, it is important to keep in mind that these clauses need to be precisely drafted because in case of any doubts courts will interpret it restrictively [14]. Since clause is commonly used in international sales contract, it is important to know when it will take effect according to the German law. If the seller is domiciled abroad and the buyer is domiciled in German, the clause will take effect when goods are on German territory according to the principle of the *lex rei sitae* [14].

However, one of the most important effects of the retention of title clause is in the case of insolvency of the buyer. It has been changed in 1999 when new Insolvency act entered into force [5], [15]. Depending on type of retention of title clause, the seller may have right on segregation or separation of the item sold. If the sale contract contains simple or ordinary retention of title clause, then the seller has the right on the segregation of its property [15]. On the other hand, when other types of the retention of title clauses are in question, the seller has separation right [15].

The seller is granted segregation right only if the purchase price is not paid in full until the beginning of the insolvency procedure [5]. After the insolvency proceeding has started, the insolvency receiver decides whether the contract is going to be continued and executed or terminated. According to art. 107 of the Insolvency act, the insolvency receiver is not empowered to make such decision before the first meeting of the creditors [15], and the seller is not entitled to start legal proceedings for surrender of the sold item before the first meeting of the creditors [5]. After the first meeting of the creditors, the insolvency receiver makes declaration and he can pay the purchase price or terminate the contract. If he pays the purchase

price, he becomes proprietor of the sold item, and if he decides to terminate the contract, he is obliged to surrender the sold item to the seller [5].

This solution may be good for the rest of the creditors, since they have the opportunity to discuss about the destiny of the item over which the title is retained, but on the other hand one has to keep in mind that the seller has the title over the sold product, and actually, he is the real owner of the sold item until the full purchase price is paid. Hence, this German solution could be contrary to the nature of the right of ownership. Since the seller is the owner of the sold item, he should have the right to decide whether to execute or to terminate the contract and not the insolvency receiver whose duty is to handle the insolvency estate.

On the other hand, in the case of complex retention of title clauses (extended or enlarged retention of title), the seller will have separation right in case of bankruptcy of the buyer. The seller's duty is to inform insolvency receiver about his right, and after that he becomes separate creditor [9] and the insolvency receiver is obliged to pay the seller proceeds on which he has right upon the liquidation of the sold item [9].

Having in mind the nature of the ownership this solution may also be contrary to it. Since current solution deprives the seller of the possibility to decide the future of his property there is also a room for some improvement. On the other hand, keeping in mind interest of the business, some future solution should make the balance between the right of ownership and the interest of the business (e.g. when sold product is almost paid and very important for course of business, the insolvency receiver should have power to decide upon it together with the owner/seller).

However, German solution has served as the role model for more than one civil legal system. It has proved its value and it achieves its goal.

3. RETENTION OF TITLE IN ITALY

Compared to German law, Italy as a representative of the Romanic legal circle has different solutions, which are more statutory based and more complicated. In Italy retention of title is regulated by Chapter 3, Title III, Book IV of the Italian Civil code [5], [16]. Whereas art. 1523 regulates only retention of title in case of instalment sales, the court practice has extended the possibility for contracting this clause. According to the case law of Italian Court of Cassation, retention of title may also be agreed in case of partially or entirely differed price [17]. With regard to formal requirements, written form is of essence if the seller wants to enforce the retention of title against third persons (e.g. creditors of the buyer). On top of that, the document containing the clause has to bear a certain date (*data certa*) prior to any kind of procedure against the buyer [5]. Finally, according to paragraph 3 of the same provision, the sale of goods must be recorded in public registry [5].

Beside the Civil code rules, there are also other statutory instruments, such as the Law of 28th November 1965, No. 1329 (so called *legge Sabatini*) [5], which deals with sales of machines and machine tools. According to this Law, the seller may agree and enforce retention of title against buyer's creditor only if the sold machine has been marked with a label which states the seller's name, the type of machine, serial number, production date and the court which has jurisdiction over the contract [5].

There is also a Legislative Decree of 9th October 2002, No. 231 whose aim is to implement the Late payment Directive [5]. This same act was object of scrutiny before the ECJ. Namely, some

provisions of this Decree have set rather hard conditions upon the sellers. It requires that the retention of title clause is agreed in written form, confirmed in every individual invoice issued for subsequent supplies, bearing a certain date prior to any procedure and duly entered into accounting records. From what has already been said, it is obvious that the Italian approach to regulation of retention of title is very formalistic which is a reason why it eventually came under the scrutiny of the ECJ. The question was whether this provision is in accordance with the art. 4 of the Late payment Directive. In its case *Commission v Italy* ECJ held that this solution is consistent with the Late payment Directive [8].

Besides the ECJ's ruling, there are number of judgments of Italian courts regarding formal requirements for contracting retention of title. First of all, Italian courts have ruled that Italian provisions on retention of title are part of the public policy rules (*norme di ordine pubblico*) [18], which means that they cannot be derogated by any kind of agreement. According to Italian statutory law, as well as the court practice, the retention of title clause is an object of the mutual agreement and „*a mere confirmation of the RoT clause on the individual sales invoices would not suffice to be enforced against the creditors of the buyer and the receiver. In fact, a RoT clause must be subject of consensus, which would be lacking if the provision was included in an invoice...*“ [5],[19].

With regard to private international law aspect of retention of title clause Italian courts apply *locus situs* principle and confirm that Italian law is to be applied if the sold item is located in Italy [18].

With regard to buyer's bankruptcy Italian law, similar to the German law, gives some important powers to the insolvency receiver. According to the Italian Bankruptcy Act, a mere judicial declaration of the insolvency proceeding against buyer does not cause termination of the contract. Actually, the insolvency receiver is empowered to decide on termination or execution of the contract [5], [20]. Courts have ruled that in case of termination of the contract, seller must return all previously paid instalments, but he has the right to fair compensation for the use of the item sold. Also, if insolvency receiver decides to terminate the contract, seller may file a claim (*rei vindicatio*) against the insolvency receiver in order to recover the price or the sold item [5].

As obvious, Italian approach to retention of title clause is rather restrictive, subject to the extensive court practice of Italian courts, as well as the ECJ's. Speaking about its flaws, the Italian law gives similar powers to the insolvency receiver as does the German law. The difference is that the Italian court practice did not express its view with regard to the receiver's powers with the nature of right of ownership.

4. RETENTION OF TITLE IN UNITED KINGDOM

Compared to civil law systems, *common law* systems show some differences in regulating this institute. The main representative of this legal circle is United Kingdom. English law, much like German law, has only one statutory provision which is the main source of the seller's right to retain the title over the sold item, but the effects of the clause are defined by case law.

Moreover, retention of title clause in England was first introduced by the *Romalpa* case [22] in which English court allowed the seller to retain the ownership of the sold item until the buyer has paid the full price. Regarding the statutory regulation, Sale of Goods Act, enacted in 1979, contains the most important provision which authorizes the seller to retain the title over the sold

item under the specific circumstances. Based on that provision, contractual and court practice have developed different forms of retention of title clause whose effects are governed by the case law [5]. Today this legislation recognizes simple retention of title clause, all monies retention of title clause, mixed goods retention of title clause and proceeds of sale clause [23].

Contractual practice uses retention of title clause in different contractual relations, such as hire-purchase agreement or conditional sale agreement, most often related to consumer protection [21]. On the other hand, there are some industries and some contract forms in which the use of retention of title clause is customary, e.g. clothing industry or record industry [26].

Under the English law retention of title is not a subject to public registration and it can exist without any kind of publicity. Still, some scholars recommend registration of the retention of title clause, just as with any other secured interest [12], [25].

With regard to enforceability of retention of title clause, UK law proscribes some additional conditions to be fulfilled. Namely, every sold item over which the seller has retained the title has to be identifiable. Usual method is to mark products or to put their serial number on unpaid invoices [26]. If the item is not identifiable, the court will hold that the product has lost its identity and retention of title clause ceases.

In the absence of the statutory regulation, the court practice has developed the effects of the retention of title clause with respect to third parties. According to the view of the House of Lords in the *Armour* case a mere retention of title clause in the seller's General Terms and Conditions of sale is not sufficient to create a security form [24].

Likewise, in other legislations under UK law also, the most important effect of the retention of title clause is a special status granted to the seller in the case of bankruptcy of the buyer. According to the Insolvency Act from 1986, in case of insolvency proceeding against the buyer, retention of title clause goes into moratorium and the seller doesn't have any possibility to repossess the sold item [5]. Insolvency receiver (*administrator/official receiver*) is empowered to decide about repossession of the sold item by the seller. The same power has the competent court. Here, the same as in other previously presented legislations one could see the contradiction between the rights of the insolvency receiver (or under UK law administrator) and the right of ownership.

5. CURRENT STATE OF PLAY AT GLOBAL AND EU LEVEL

As it can be seen from the previous discussions, up until recently most of the global legislative efforts with regard to RoT did get stuck in the middle of „national prerogatives“ debate, until recently. Retention of title is now regulated by the UNCITRAL Model Law on Secured Transactions (the "Model Law"), enacted in 2016. For the treatment of security interests in insolvency, the Model Law relies on the recommendations of the UNCITRAL Legislative Guide on Secured Transactions which implies the same set of rules or at least the same principles for regulating all secured transactions [14] and the UNCITRAL Legislative Guide on Insolvency Law [44].

With regard to EU level, functioning of internal market is based on the country of origin principle as well as mutual recognition principle. So, when there is a clash of different national legal systems, as it might happen in case of „imported“ retention of title clauses, it could potentially be considered a quantitative restriction on imports, which Art. 34 TFEU strictly

forbids [27]. Thus, any measure which directly, indirectly, actually or potentially hinders the functioning of internal market may be prevented, unless proven justified and proportional or, according to Art. 36 TFEU, justified by other „overriding reason of public interest“ [28]. It is quite clear that „internal“ considerations do not necessarily make sense within the internal market and that diversity of property law rules may potentially lead to the infringement of Art. 34 TFEU [30].

Yet, despite (sometimes) wide disparities of national property laws in Europe, the question remains whether the EU has the competence to act and on which basis?!

There is of course an Art. 114 TFEU, the most important legal basis for harmonized measures relating to the internal market [30]. It has already been used by the European legislator for the adoption of measures in an array of private law (e.g. consumer contract law) but not without controversy [33]. Due to its rather extensive use, settled case law has set some boundaries. Therefore, there must be differences between Member States provisions because mere finding of disparities between national rules is not sufficient to justify having recourse to Article 114 TFEU. The differences between Member States provisions should be such as to obstruct the fundamental freedoms (have to have a direct effect on the internal market) [33]. Intended measures must aim to prevent the emergence of future obstacles to trade, resulting from differences in the way national laws have developed [31].

On the other hand, there is also an Art. 345 TFEU (ex Art. 295 TEC) which seems to forbid EU's legislative action. Namely, respective provision expressly states that: „the Treaties shall not prejudice the rules of the Member States governing the system of property ownership“, i.e. that the rules governing ownership rights are reserved to the exclusive competence of the Member States. Strict linguistic interpretation would lead to a conclusion that the EU has no competences whatsoever regarding the property law. However, from the point of view of the ECJ, this interpretation might not be so strict. The article was relied at in different cases [34] and it may be inferred that „it cannot be construed as granting the local legislator the competence to adopt legal measures which could violate the free flow of goods in the common market“ [34]. Thus, although the rules governing property rights are generally reserved to the exclusive competence of Member States, this particular provision does not exempt such rights from the scrutiny of basic Treaty rules. Moreover, it may be inferred that this provision does not concern the content of the right of ownership nor the objects of this right, since article 345 TFEU expressly refers, not to right of ownership itself but, to „system of property ownership“ [35]. Finally, in 2013 ECJ has passed the ruling (Case Essent) in which it expressly confirms that Article 345 TFEU does not stand in the way of making EU property legislation [36]. So, what is EU plan in this area? Is there one?

Looking into the past it is easy to establish that EU's legislative activity in this area forgoes many of the late ECJ's decisions. Namely, intellectual property rights are regulated on EU-level [37], cultural property rights are also regulated on EU-level [38], as well as financial collateral arrangements [39] and some other special fields of property law [40]. Regarding the retention of title clause, this institute has been harmonized by the Directive 2011/7/EU of the European Parliament and of the Council of 16 February 2011 on combating late payment in commercial transactions (hereinafter: Late Payment Directive) [12]. European Union has also enacted Regulation (EU) 2015/848 of the European Parliament and of the Council of 20 May 2015 on insolvency proceedings (recast) [13] which regulates the effects of the insolvency proceeding on the retention of title clause.

Thus, the EU has tried to unify RoT clause, but with not much success. Namely, RoT clauses are a bit specific since they function as a security but dogmatically remain an ownership [12]. Due to their diversity and their strong foundations in national property law the outcome of the intended harmonization, at least with regard to Late Payment Directive was much less than satisfactory. Unlike the Draft produced in 1998, in the final version of the Directive standard of the RoT clause has been significantly lowered [41]. Thereby, apart for the simplest RoT clauses, others do not have to be recognized in a cross-border cases if national requirements have not been met. According to Art. 9 of the recast Directive, it should be expressly agreed and conditions of the validity remain determined by the *lex rei sitae* principle. Directive remains silent on the effects in case of debtor's insolvency, effects against third parties and the effect of stricter national conditions.

With regard to Insolvency Regulation, question of the RoT clauses has been observed primarily with regard to the principle of *paritas creditorum*, basic principle of insolvency law [42]. The idea was to introduce more predictability with regard to ranking of individual creditors in a cross-border cases (general creditors, preferential creditors to the estate or „super-priority creditors“). However, according to Recital 22 of the recast Regulation, although the differences in ranking classes of secured creditors may lead to discrimination and insolvency tourism, the application without exception of the law of the state of opening of proceedings (*lex fori concursus*) would frequently lead to difficulties. Thus, as in case of Art. 10 (Reservation of Title), Regulation excludes from the effects of the insolvency proceedings certain rights located abroad. „By means of 'negative' conflict of laws rule it treats the rights as if there was no insolvency“ [43]. Those are the areas where the Regulation provides for exceptions from the application of the *lex fori concursus*, in favor of national law. Fundamental problem lies in the fact that such different national treatment of secured creditors may lead to the opening of secondary insolvency proceedings, which may endanger successful restructuring of the debtor's business [42].

6. CONCLUSION

Looking from a comparative perspective, legal regimes on the validity and effects of RoT vary significantly among European countries. More or less, the only common denominator is the express contract term which states the particular effect of the RoT, i.e. the transfer of title of the goods sold at the time of the full payment of the purchase price. All the other requirements, like: the type of system of transfer of property (consensual or abstract), the systems of security rights (possessory or non-possessory), the claims that can be secured, the object of security, the presence of registration requirements in connection with the third-party protection, passing of the risk, etc. vary from state to state [45]. While the transfer of possession and passing of risks are often coincident with the transfer of ownership and usually governed by harmonized sources of law (e.g. CISG) or commonly adopted standard terms (e.g. INCOTERMS), the transfer of title is ruled by the national laws applicable to the secured goods. Thus, this is the area for which better solution has to be found. Namely, in order to achieve legal certainty in cross-border cases the same set of rules would have to be applicable universally.

Although, it is obvious from our analysis that there are no legal obstacles for the EU to legislate in this area, so far it is not likely that the EU will develop a full property law. It is because it is crystal-clear that despite the goals of harmonization being decided on the EU level, achievement of these goals depends entirely on the Member States. On the other hand, the EU integration process continues and there is increasingly more movement between EU Member States. So, what would be the feasible path for the EU legislator? Definitely harmonization with the view

of unification of RoT clause effects. Its unique nature (contractual, proprietary and procedural effects) as well as its potential impact on fundamental freedoms may be used as the justification for such intervention.

Inspiration may be found in different legislative acts, like Art. 9 of United States Uniform Commercial Code or Book IX of the Draft Common Frame of Reference or EBRD Model Law on secured transaction, etc. There is also UNCITRAL's Model law on secured transactions, so the inspiration and guidance should not be a problem. For the start it would be encouraging to consider the least disputed questions and to move from minimum to maximum harmonization directives. With regard to Insolvency Regulation, in order to avoid the possibility of opening the secondary insolvency proceedings creditors may be given an opportunity to obtain satisfaction according to the ranking of their national law, but only under the condition that it is not detrimental to the creditor of the main insolvency proceedings.

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PLACE OF THE NATIONAL STATE IN CONDITIONS OF GLOBAL ECONOMY WITH THE SPECIAL REVIEW OF COUNTRIES, BRIC-S MEMBERS

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Abstract: *The process of economic and political globalization has a major impact on the integrity and sovereignty of national states. In this context, social conflicts that invalidate or prevent the manifestation of positive effects of globalization can also be induced. However, the requirement to preserve the economic sovereignty of national states should not be an obstacle to their cooperation on both regional and international level. Although such cooperation in the conditions of globalization is implied, it should be suitable to the expectations for achieving, a socially more righteous and humane world society. Furthermore, in the conditions of an advanced globalization process, only strong and well-organized states that have full knowledge of the critical factors that are bearers of social phenomena and have the opportunity to survive as entities rather than objects, systems of international relations.*

Keywords: Global economy, national sovereignty, transition, TNK, BRIC-S

1. INTRODUCTION

Globalization should be viewed not only as a consequence of the simple market logic, but also as a result of geopolitical power relations. This results from the fact that geopolitical and economic interests are not mutually independent elements, but that they appear in the modern world as an integrated set, because the economy is really sufficient for interdependence, but for the integration, however, a state or political will is necessary. Otherwise, states, subjected to the interests of powerful corporate elites, will increasingly work in favor of transnational capital, and less in favor of citizens, which can lead to retrograde public interest and civilization flows under the full control of private interests, both at national and international level.

2. INSTITUTIONAL TRANSITION AND TRANSFORMATION OF THE GLOBAL ECONOMY

The repression of the state from the process of transition, now it is quite clear, was one of the biggest mistakes. A clear restriction between the state and the economy when moving to a market economy is a necessity. „States, as forms of territorial organization of individual nations, are not only organizations within which the power is exercised. These are social groups in which, to a greater or lesser degree, certain social functions are realized, the realization of which often expresses the specificity of the development of individual nations“ [1]. State interventions are necessary not only through the correction of market defects, but also in order to provide external conditions for its functioning.

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The state should strengthen its function in the construction of a market economy institute and apply the „rules of the game“ and weaken its function as the general manager of the economy. Regardless of how much the structure of an inherited economy did not correspond to a structure that would be formed on the basis of a market mechanism, the decay of many businesses could have been avoided by a deliberate policy of transforming and reorienting them, not just by accepting the IMF's advice [2]. Therefore, on the one hand, at all costs should be achieved to ensure that the economy is independent and to prove its results through the market, and on the other hand it is a matter for the state to stimulate market economy through its institutions, mechanisms and instruments and harmonize the realization of development and social goals.

However, we should keep in mind that the process of globalization puts national states, depending on the degree of their socio-economic development, into a different economic position. As is the case with market competition within the national state, within the framework of which economic entities that have above-average conditions of production achieve a more favorable, i.e. above-average economic position, the same is the case with the effects of competition on the international plan. Actually, in conditions of international competition of economic entities, the spillover of national income from countries with less favorable production conditions to highly developed countries is carried out. This causes unevenness in the development of national economies. At the same time, bearing in mind the undisturbed aggressive performance of large-scale capital, encouraged and promoted by the alliance of the most developed industrial countries, being supported by a number of financial institutions, a very serious problem appears in creating the conditions and the possibility of independent and sovereign development of national states.

In this way, the process of economic globalization places in a different economic position, highly developed industrial countries in relation to developing countries or countries in transition. In fact, the process of globalization causes inequalities in the distribution of wealth and income to the benefit of the developed. Thus, we come to the conclusion that the less developed countries have to not only adapt to the requirements of the globalization process by their economic system, development planning system, national development and economic policies, but also in terms of plans and organization, in building their own economies, they have to eliminate or at least alleviate the negative consequences of globalization. Therefore, unlike the position of business entities who, due to the unconformity to the requirements of market laws, can fail even if they did not choose an adequate development orientation, national states, no matter how dependent on global trends and a unified economic policy at the level of the world economy, must have their own national economy, its strategy and economic development policy, which provides them a national socio-economic identity and national sovereignty.

It is believed that there has been a great shift in the center of power, which has passed from the hands of national states and democratic governments to the hands of the TNC and banks. Such a conclusion is an illusion or at least premature. „And the national states, of course, those powerful, and their governments, supranational, transnational and planetary corporations, as well as large banks - make up the whole and perform various functions of reproduction and strengthening with occasional rubbing“ [3].

Without the military power and the entire military industry sector, the TNC would not have a protector. And the army is one of the state pillars. Could the wars for oil, and raw materials and markets that are needed by these corporations be managed and obtained without the use of force, as the most effective form of direct power, which are at disposal to the countries from which the companies come from?

If the thesis is proved to be wrong that national states are already leaving the historical scene and conceding way to multinational and transnational corporations, this does not mean that these corporations are not suppressing states, even in some areas where the classical state as an institution had a monopoly regulation. (Post)modern state is no longer able to prevent the departure of capital from its territory and to ensure its economic sovereignty by effectively collecting taxes on the profits of the strongest economic corporations whose committees are located on its territory, nor to perform its social functions in socially acceptable extent. A global corporate network is being created. The material basis for the functioning of large national states such as Germany is reduced, as far as one of the country's most important sources of income is concerned - taxes, and the benefits of economic prosperity belong to the upper tenth of the population. Between 1984 and 2003, „corporate income tax revenues fell by 18.6%, and nearly half accounted for proportionally in total fiscal revenue“ [4]. Bek states that in the last two decades of the last century, the countries of the European Union had become 50 to 70% richer, and that in them, there were twenty million unemployed, fifty million under the poverty line and five million homeless. In the United States, only the most powerful 10% of the population enriched themselves from economic development, who accumulated 96% of the extra wealth. In Germany, „since 1979, corporate profits jumped by 90%, and wages by 6%. Revenue from income tax has doubled over the past ten years, while corporate tax revenue has dropped by half... Most transnational corporations, such as Siemens or BMV, no longer pay taxes at home...“ [5].

3. INTERNATIONAL DEVELOPMENT ARENA AND COUNTRIES, BRIC-S MEMBERS

When it comes to states, states in which four-fifths of the world's population live are not able to significantly affect the process of globalization. They are essentially objects and „importers“ of globalization in its technological, economic, political, informational and cultural terms. And here one should state some of the thoughts that a kind of „world government“ that forms the fate of the world is being rapidly formed. Such attitudes represent the doctrine of „benevolent global hegemony“ and openly say that „the whole world is an American domain“, and that in the coming century all countries of the world will recognize „one, global power“. We are witnesses of „... the emergence of transnational elites comprised of international businessmen, scientists, professional and state officials“, and opinions that advocate a „gradual breakdown of sovereignty, piece by piece“, which will „achieve much more than an old-fashioned frontal assault“ [6]. America should not hesitate to act as an omnipotent superpower in the business of globalization and that „the hidden hand of the market will never work without a hidden fist“ [7].

In this movement to deposition, the essence of neoliberalism is seen: the old myth of Smith's „invisible hand“ gets such an upgrade that nothing remains of it. The ideology of the „hidden fist“, and not only hidden but visible, undo what is the most important value in original liberalism - freedom, although such a metamorphosis of liberalism is not a coincidence. In liberalism as an economic theory, the profit on the basis of private property has always been more important than freedom, and the colonial conquests of the world are justified by the Christian mission. Neoliberalism is not by chance the official ideology of the United States planetary expansion. They turn this theory into practical politics through various international organizations and institutions in which they dominate. The actual influence of the United States, for example, in the World Trade Organization, can be seen from the fact that they have succeeded in lowering customs duties from 40% to 5%, with the circle of countries entering that organization increasing to more than 140 countries [8]. Such a duty regime primarily

corresponds to the strongest economies that can offer the best and cheapest goods. True, it also suits China, as well as those developing countries that have quality and affordable goods for export. However, considering the overall economic power, it mostly suits the members of Group 7. „And when it comes to the United States, their supremacy in the World Trade Organization supports, monitors, and in large part generates military, political and media domination in the world. Today, the "world government" is primarily the US government. Along with the above views on the hegemony of the United States, there is a vision according to which America will rule the new age. All of its energy is directed at spreading information technology and popular culture, economic-financial domination and continuous military domination all over the world“ [9].

However, the emergence of a block of countries called BRICS (Brazil, Russia, India, China and South Africa) has become one of the most interesting events in the contemporary international arena. Many international relations experts claim that this block of countries is an important factor and has significant power that will probably significantly affect the significant reform of the architecture of the global economy and according to it the political system [10].

BRIC-S countries possess both physical and symbolic characteristics that justify the existence of this group [11]:

- They have economic, military and political resources, the ability to contribute to an international order, internal cohesion that enables effective state action;
- They believe they deserve a higher status at a global level;
- They have developed informal channels of mutual cooperation;
- They have an ambivalent attitude to the liberal order.

Also, the creation of new institutions, such as the New Development Bank, Contingent of reserved arrangement and increased participation in the existing entities (IMF), are taken as signs of their greater influence and qualified contribution to global governance [12].

The tendencies of forming supranational elites, as well as the global authorities, should be taken seriously, at least as one of the possibilities. Nevertheless, such a development of the world, although not impossible, is hardly achievable from the present perspective.

4. GLOBAL ECONOMY AND ITS INCONSISTENCIES/CONTRADICTIONS

Social processes have a contradictory character, a different flow and a historical role. They are interpreted differently by scientists and actors from different theoretical perspectives and views of the world. In the last decade of the twentieth century and at the threshold of the new millennium, globalization as a process especially seizes the attention of mankind. There are many controversies in theory and practice about it. However, at the same time, due to the residues of class determinism and the antagonistic system of social power distribution, the world system divides into a developed world center - North, and the undeveloped world - South (semi-periphery and periphery), among which there are numerous inequalities and contradictions. Data show that „since the 1980s absolute poverty in all underdeveloped countries has increased, and in the most parts of Africa and Latin America it has increased in both absolute and relative terms“ [13].

All these facts are more or less known. Awareness of their meaning exists, but the situation in the world does not change. Forcing them to change at least for now has no echo. Besides, the question remains: how? Undeveloped countries are being suffocated in the inherited and newly

enormous difficulties of mere survival, in the conditions when neoliberal capitalism becomes a global system. Globalization as a process, with its consequences on development, increasingly marginalizes the interests of most countries and the population, and strengthens the wealth and power of the minority, the major capital protagonists of the modern world. In this regard, researchers rightly point out that „the globalist scenario” is multiple contradictory because:

- produces very different effects for the center and periphery;
- developed countries are a subject, and the underdeveloped object of globalization;
- there is a large number of hungry and malnourished in underdeveloped countries and a small number of rich in developed countries;
- provokes chaotic and contradictory processes of deregulation and centralization;
- liberalizes activity in the financial markets and preaches the openness of the economy of underdeveloped countries and retains wider significant protectionist and other constraints in developed countries;
- leads to conflicts of state and transnational interests;
- destroys the barriers of national markets and creates international monopolies, etc.

The above contradictions could also be considered from the aspect of the relationship of economic slavery and freedom in the modern world“ [14].

Bearing in mind the contradictory and negative consequences of globalization on social development in the world, it is no coincidence that in today's world a powerful anti-globalist movement of the post-capitalist alternative has been formed with the slogans such as: „The world is not for sale“, „Another world is possible“, „For the world of equal“. Their protagonists criticize the neoliberal unipolar concept of globalization, i.e. globalization or as they call it a „new world order“ colloquially, demanding reform of the international economic order in favor of the world's majority.

The controversy certainly presents the preaching of the rapid liberalization of the economy of underdeveloped countries according to the model of so-called - shock therapy, while developed countries not only developed with protectionist measures, but also in the stage of development strictly retain and even expand their protectionist aspirations. In the early stages of development, rapid liberalization cannot produce positive effects, nor can development spontaneously occur with the perfect functioning of market forces [15].

While in the past, countries existed as market rulers, today the situation is diametrically opposite, since globalization has, over time, made undesirable traditional functions of the state, and the emerging changes on the global plan greatly limit the maneuvering space of national states. „National capital does not have much grace in terms of social policy, equal care for all segments of the population, and especially for those who are not able to generate profits. The increasing dissatisfaction of the masses arising on these occasions is directed at their governments, whose hands are tied. There is a constant huge global debt, on the one hand, against the enormous profits of global activities and this gap is continually expanding. It is therefore no wonder that in the larger areas of globalization losers, the process of globalization is perceived as a continuation of already well-known colonization, or Western imperialism. This will be so long as the global inequality becomes more and more expressed [16].

5. CONCLUSION

The challenge for both developed and developing countries is how to respond to these challenges with an open and participatory national state at the international level. Therefore,

the apologists of globalization point out that common problems will unite the fates of different national states located in different parts of the world. This means that territorial constraints will kneel before the power of a transnational organization, so that the world order will no longer turn around sovereign states. However, although this trend, accompanied by revolutionary technological innovations, has alleviated democratization, market-oriented reforms and increased economic integration, globalization is not a solution to world problems, nor is it itself a source of well-being. It is, above all, a process of change and set of international relations which are being generated. Therefore, the arguments about the unnecessary role of the state in international relations seem unconvincing and have not yet succeeded in weakening the power of national states.

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ANALYSIS OF GROSS DOMESTIC EXPENDITURES ON RESEARCH AND DEVELOPMENT IN SOUTH EAST EUROPEAN COUNTRIES

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Abstract: *Research and development activities are one of the main sources of competitive advantage in the most developed countries. Research and development include innovative activities in developing new and improving existing services or products. This paper focuses on the analysis of gross domestic research and development expenditures (GERD) in South East European (SEE) countries. It will include a comparison of GERD by sources of funding and by type of research and development. Additionally, the correlation between GERD and global competitiveness of SEE countries will be conducted.*

Keywords: *research and development, expenditures, competitiveness*

1. INTRODUCTION

Research and development activities are one of the necessary factors for achieving benefits and overall development of the country. Within the past decades, the manufacturing-based industrial society that emerged within the nineteenth century has been transformed into an information economy.

The main objective of this paper is an implementation of analysis of gross domestic research and development expenditures (GERD) and the correlation between GERD and global competitiveness in South East European countries: Albania, Bosnia and Herzegovina, Bulgaria, Croatia, FYR of Macedonia, Greece, Montenegro, Romania, Serbia and Turkey.

The structure of this paper consists of 6 main parts: introduction, literature review, research and development strategies in South East European countries, methodology, results and conclusion.

2. LITERATURE REVIEW

The introduction of research and development rivalry started with the models of Romer (1987), Romer (1990), Aghion and Howitt (1992), Grossman and Helpman (1991) and other comparable works (Barro and Sala-I-Martin, 2004). In 1992, Aghion and Howitt built up a model of endogenous development by including the job of research and development in financial development. This model utilized the possibility of inventive devastation. It expects that the individual research can likewise influence the entire economy. The model inferred

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balance through forward-looking contrast condition. It implies that the pace of research in a period relies upon present research and on the profitability of research. [1]

Research and development for all countries is one of the more important segments for achieving competitiveness advantages and overall development of countries. In the past several decades the manufacturing-based industrial society that emerged in the nineteenth century has been transformed into an informational society, and a knowledge economy. As the Nobel Laureate Ken Arrow noted, “The central economic fact about the processes of invention and research is that they are devoted to the production of information”. The generation of information requires research; therefore, research is going to be one of the most important jobs in the society of the future. Just as farmers in preindustrial society were central players, particularly in periods of famine, so the researchers will be the central players in the future, especially in the advanced industrialized economies.[2]

Authors Rajnoha and Dobrovic state that actual business environment has changed dramatically and depends especially on the performance in generating and utilizing new knowledge, information systems, innovations and management techniques and tools for creating the higher business performance. Exploring the competitiveness-enhancing determinants has occupied the economists' minds for hundreds of years. Starting with Adam Smith's theories focused on specialization to neoclassical economists' underlying the need to invest in physical capital and infrastructure, up to the current interest in areas such as education, professional training, technological progress, macroeconomic stability, market efficiency, etc emphasize that market economy is a competitive economy, thus competition is a crucial part of economic activity.[3]

Measuring and increasing global competitiveness is a complex and difficult process. In recent decades, economic science, as well as practices, have been paying attention to innovation, considered to be the main driver for countries' economic competitiveness and growth. As reported by Hunady et al. (2017), innovation potential still differs significantly not only among EU regions, and R&D expenditure seems to be the key factor determining the innovation potential and performance of a region. According to Szarowska (2017), R&D is fundamental for the knowledge-based economies' competitiveness, and support of R&D and innovation is also a political measure. In line with the Lisbon strategy and Europe 2020 targets, investment in European R&D should be increased to 3% of GDP, but this target has not yet been reached. From this point of view, Habanik et al. (2016) emphasize that in the absence of significant changes in legislation, competences and financial incentives that promote research and development investments and innovations in industry, technologies, and services, the regions will fail to attract capital to support R&D and innovation potential. In this regard, they will also fail in shaping a new structure of the economy based on long-term competitiveness.[4].

3. RESEARCH AND DEVELOPMENT STRATEGIES IN SOUTH EAST EUROPEAN COUNTRIES

Since this research has been focused on South East European (SEE) countries, strategic objectives regarding R&D activities from these countries, will be presented in the following text.

In Albania The National Strategic Program aims to: develop innovation in key sectors of the Albanian Economy – growing awareness to the enterprises on innovation and technology development needs; initiate, import, modify and diffuse new technologies in enterprises; increase the capacity of business supporting organisations to assist in the innovation of

enterprises; assist directly with technical information; assist enterprises to gain external funding for innovation activities; enable the creation of new innovative firms [5]

The significance of the development of science and technology (S&T) in Bosnia and Herzegovina is emphasized at all international forums, especially after the adoption of the document “EU-Balkans countries, Action plan for S&T” 2003, as well as during all meetings and conferences involving policy makers for S&T in the countries of West Balkans and EU countries. In accordance with the aforesaid, Bosnia and Herzegovina acknowledged the development of science and technology as one of its priorities. A renewed establishment of an efficient system of research and technological development of Bosnia and Herzegovina (B&H) includes development of a Strategy with full support of all bodies involved in its development, specifically the decision-makers at all levels of authority in its implementation phase, because this it is the only possible way to develop the „triangle“ of the prosperous future of a country: education - science – economy, with positive participation of the authorities (politics) as a catalyst.

The goals of the Strategy for the development of science in BiH are:

- To ensure a leading role of science and technology as factors of a long-term development of a country through the consensus of all decision-makers in such a way that the development of science represents a general interest;
- Increase funds of the public and private sector in B&H for the field of science and technology at the basis of long-term and short-term defined priorities and plans; as well as ensure continuous support to innovations, transfer of technologies and commercialization and application of scientific achievements;
- Follow-up the development of science and technology and its effects to other areas of society based on internationally recognized statistical standards;
- More active participation of B&H researchers and institutions in the European scientific research network and European Research area (ERA);
- Develop a new system of higher education and enable it to perform competent scientific research work, with the aim to ensure new generation of scientists and professional development of existing scientific and research personnel;
- Structural changes in the scientific research systems, with the emphasis on cooperative and joint research of universities, scientific-research institutes and industry; that is, ensure a stronger connection of science and economy with the aim of achieving development goals;
- Ensure access to electronic scientific databases, connecting library systems, support to strengthening local scientific magazines, establishing databases of scientists and scientific institutions;
- Development of research infrastructure by international standards;
- Re-investing into industrial research in a certain number of sectors.

Therefore, the goals of the Strategy for the development of science in B&H are the development and building of Bosnia and Herzegovina as a new, modern society, known as „the society of knowledge“, where knowledge is the key creative force in the personal, economic, social, cultural and financial progress.[6]

Science and innovation are key factors of competitiveness and sustainable development. The main preconditions for the creation of an innovative society of knowledge are the excellence and relevance of scientific and research results. Excellence is a measure of quality and international visibility of scientific and research results, and the relevance represents the impact

of the scientific and research results on the economy and society. The Strategy on Scientific and Technological Development of the Republic of Serbia for the period 2016 – 2020 – Research for Innovation (hereinafter: the Strategy) is a document which sets out measures and programs for the promotion of excellence in science and targeted research for the development of economy and society as a whole, in the next five years. Within five years, science in the Republic of Serbia will be based on a competitive system that supports excellence in science and its relevance to economic development, competitiveness of the Serbian Economy, and development of society as a whole.[7]

Romania must also fulfill a specific ex-ante conditionality as far as the relation between its R&D and its economic competitiveness strategies is concerned. The strategic mechanism should be directly linked to the process of monitoring and assessment of the implementation of the National Strategy for R&D 2014-2020. Objectives for the increase of effectiveness of the national Romanian research system are:

- Increase the research and development (R&D) expenditures – Indicator: 1% of GDP for public R&D expenditure and 1% of GDP for private R&D expenditure, by 2020,
- Improve the efficiency of R&D expenditure by prioritization and competition by: Improving the governance of the national research system – Indicator: operational mechanism for decision and monitoring.
- Increase the share of project based funding – Indicator: the share of project based funding in total public R&D funding (target 50%). Increasing the competitive institutional funding- Indicator: the share of competitive institutional funding in total institutional funding (target 70%).
- Increase private R&D expenditure. Promoting regulations on fiscal incentives- Indicator: number of initiatives or adopted documents.
- Enhancing Romanian participation in European research programmes and initiatives. – Indicator: number of Romanian participations to European research programmes and initiatives.[8]

Turkey's key commitments, reflecting medium-term objectives, are broadly in line with those provided in previous summits. In this respect, with the Law 6676 issued in February of 2016, a wide range of incentives were implemented by government in order to (i) raise the number of R&D centers, (ii) provide funding for fee subsidies of the R&D staff, (iii) improve the Technology Development Zones Law and (iv) decrease the tax burden on R&D projects. Besides these, Turkey has endeavored to establish thematic technology development zones in strategically significant sectors and offered a set of incentives to these pioneer sectors to boost their R&D capacity and innovation in context of the Law 6676. By the end of 2015, the ratio of general R&D expenditures to GDP increased to 1.06 percent from 1.01 percent in 2014.[9]

Without scientific-research and development activity, in areas vital for Montenegro, there can be no successful and timely transfer of knowledge from the world treasury, nor of the newly acquired domestic knowledge to support economic development and competitiveness. Recognition of positive aspirations, scientific achievements and their application, first of all in the country and the region, and then globally as well, is of utmost importance. Familiarization with them through established communication and good relations enables positioning of proper achievements and needs through development of positive competitive spirit in the creation of conditions for achieving results useful to oneself and to others, avoiding of mistakes made by others and unnecessary investment in the affairs they have already completed. Comprehension of the knowledge market and its application in closer and wider European environment would ensure to new staff a feeling of exit from anonymity, but also a feeling of increased openness

and perspective for wider application of new knowledge. Competitiveness is a base for a higher value of products or services, and it is conditioned by the quality and the quantity of new knowledge. In order to reach this kind of results, it is important to have a two way dialogue and exchange of information between the scientific-research community and the economy. In synergy, all this leads to a rapid increase of employment and growth of GDP. [10]

In the EU, as in most developed economies, the accepted ratio of public/private investment in R&D is 1/2. In line with that, and with the stated goal of Bulgaria to reach 1.5% R&D intensity by 2020, it will be the ambition of the Ministry of Education and Science to expand the public investment in research from 0.25% currently to (0.45%) of GDP in 2020. Moreover, a new goal of 2.0% R&D intensity by 2025, with which Bulgaria would reach the current EU average R&D intensity, would require a further rise in the public R&D investment to 0.67% in the longer term.[11].

Greece will strive to achieve the national GERD/GDP target ratio of 1.2% by 2020 and to increase private sector contribution to 0.38%. Particular attention will be paid to promoting activities/actions to leverage R&D by the private sector and to increase the number of skilled staff in companies.[12]

The National R&D Programme 2012-2016 aims at facilitating the transformation of Macedonia into a knowledge-based society. The National Programme defines the objectives, content and scope of scientific research. In particular, it covers the coordination, implementation and financing of scientific and research activities achievements, international cooperation and synergies with the business sector. Gross expenditures of R&D are expected to grow significantly, reaching 1% of GDP in 5 years and 1,8% of GDP by 2020. The business sector is expected to account for 50% of gross R&D expenditures.[13]

Since 2009, following the global economic and financial crisis, the level of investment in R&D decreased from 1.05 to 0.75% of GDP in 2012, with a slight increase to 0.81% in 2013. Croatia is the only new member state from Central and Eastern Europe whose GERD/GDP is lower in 2013 when compared to 2002. This level of expenditure has stagnated since 2010 and it is well below the EU average of 2.02% (2013). In absolute terms, Croatia spent about 354.7 million EUR in 2013 on R&D (Eurostat, 2014). From total GERD amount, 50,1% comes from the business enterprise expenditure on R&D (BERD), in comparison with the EU average of 63.8%. To improve the situation, Croatia has recently created a pipeline of R&D infrastructural projects in order to prepare their implementation through Structural Funds for the period 2014-2020.[14]

4. METHODOLOGY

This research has been focused on the analysis of gross domestic research and development expenditures (GERD) in South East European (SEE) countries. Countries included in the analysis are:

- Albania,
- Bosnia and Herzegovina,
- Bulgaria,
- Croatia,
- FYR of Macedonia,
- Greece,
- Montenegro,
- Romania,

- Serbia and,
- Turkey.

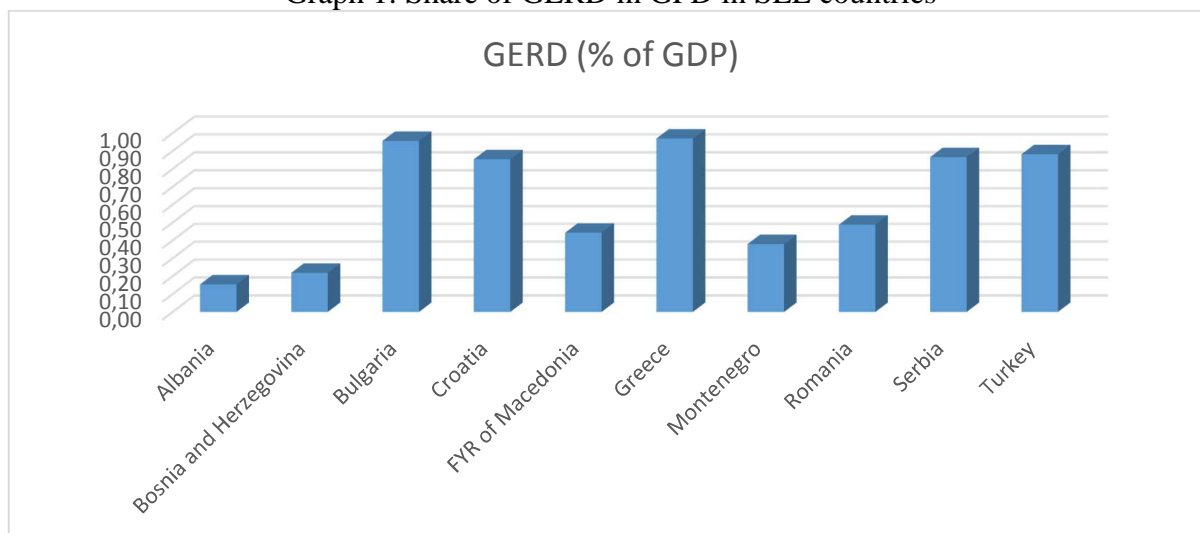
The analysis includes a comparison of GERD by sources of funding and by type of research and development. Sources of funding include industry, government, international sources and other national funding. On the other side, types of research included basic research, applied research and experimental development. Additionally, the correlation analysis between GERD and global competitiveness of SEE countries was conducted. Data from the Innovation Policy Platform statistical tool [15] and the Global Competitiveness Report for 2017/2018 [16] were used.

5. RESULTS

Share of gross expenditures for research and development in Gross Domestic Product is used as one of the main indicators in this analysis. It is used, because it eliminates size of the economy as a factor that influences an amount of expenditures for research and development (R&D) activities. This indicator gives more comparison possibilities than the total amount of GERD. Bulgaria (0,96%), Turkey (0,88%) and Serbia (0,87%) achieve highest rates of GERD as a percentage of GDP.

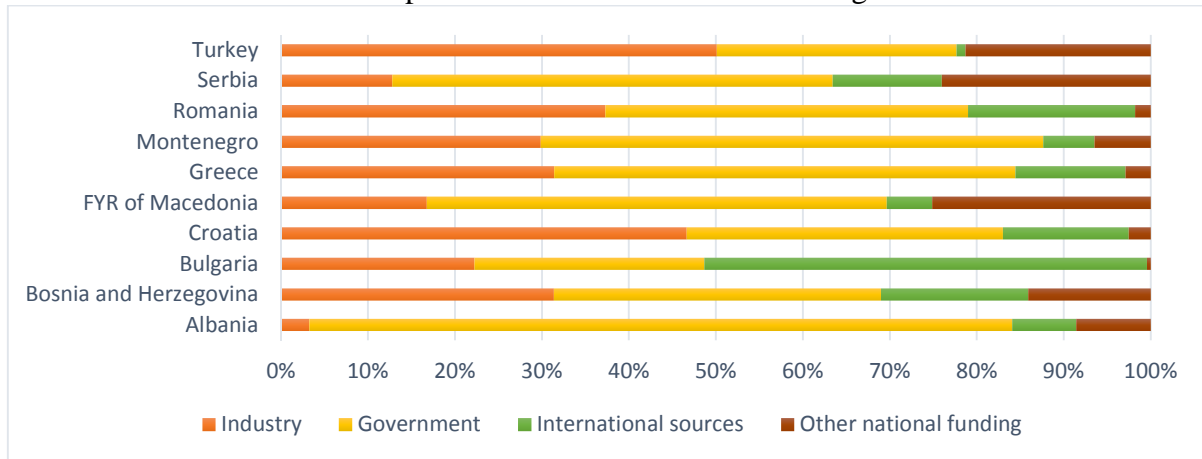
On the other side, the share of GERD in GDP in SEE countries is mostly lower than in other European countries. The fact that 5 out of 10 SEE countries are in a bottom quartile, says enough about the awareness of R&D importance in these and other SEE countries. In addition, best ranked SEE country, Bulgaria, is on 29th place out of 47 European countries.

Graph 1: Share of GERD in GDP in SEE countries



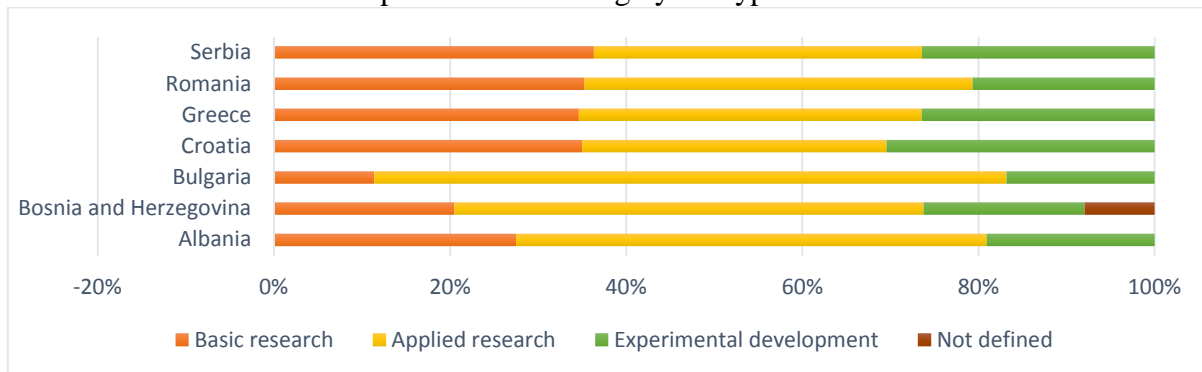
Further analysis of the structure of financing sources of R&D activities showed that there are some similarities between analyzed countries. It can be seen that in 7 out of 10 countries, government funding is the biggest financial source of R&D activities. Albania achieves the highest rates with 80,81% of government funding of all fundings of R&D activities. On the other side, Bulgaria, as the best ranked SEE country, achieves 50,88% share of international sources of total financial sources for R&D. This is a very good example of the attraction of international investments in R&D activities. Also, Croatia and Turkey achieve the most of their R&D funding through non-governmental sources. These countries managed to attract mostly industry sources of funding.

Graph 2: The structure of R&D funding



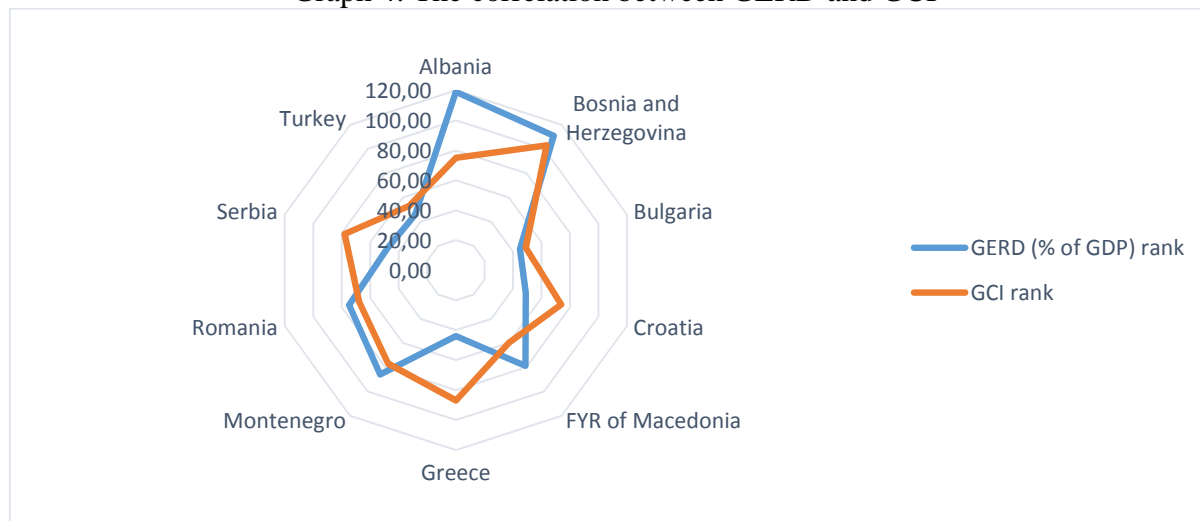
Regarding types of R&D, data for only 7 out of 10 countries were available. All countries, except Croatia, achieve the biggest share of applied research. Croatia and Serbia achieve the most dispersed funding structure by the type of R&D activities. These countries, together with Greece (26,45%), invest more than other countries in experimental research (Serbia 26,44% and Croatia 34,97%).

Graph 3: R&D funding by the type of R&D



The correlation between GERD and global competitiveness of SEE countries is analyzed in order to measure possible effects of R&D activities on the economy. A percent of GERD in GDP and Global Competitiveness Score have been used as indicators in this analysis. The calculation showed that the correlation coefficient equals 0,367 and that determination coefficient equals 0,135. It can be said that there is a moderate positive correlation between expenditures for R&D activities and competitiveness of analyzed countries. Further calculation of Spearman's rank correlation coefficient, which is based on rankings of these countries on the world level, showed that the association between the two variables would not be considered statistically significant. The biggest disadvantage of this analysis is a small number of analyzed countries, so this conclusion should not be used for all other countries in the world. In addition, the influence of other factors on the competitiveness of SEE countries is 86,33%. This shows that many other factors affect further commercial exploitation of the results of R&D activities.

Graph 4: The correlation between GERD and GCI



6. CONCLUSION

Research and development activities present one of the fundamental preconditions for higher growth and competitiveness of the country. All South East European countries adopted strategic documents with clear research and development focused objectives. On the other side, research and development needs to be supported with other strategies and their practical implementation. As descriptive statistics showed, it is necessary to think about a lot of other factors that influence R&D effectiveness – like institutional framework, range of patents, doing business, kind of R&Ds, sectors of performance, quality of human capital etc.

As already presented the results in paper, the correlation between GERD and global competitiveness of SEE countries is analyzed in order to measure possible effects of R&D activities on the economy. The calculation showed that there is a moderate positive correlation between expenditures for R&D activities and competitiveness of analyzed countries. Further calculation of Spearman's rank correlation coefficient, which is based on rankings of these countries on the world level, showed that the association between the two variables would not be considered statistically significant.

This analysis can be used as a base for further research of innovation process in SEE countries. In that way, other factors that show connection between higher levels of innovativeness and competitiveness could be explored. SEE countries should use a higher level of R&D as an orientation during creation and implementation of institutional and public finance strategies.

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KONCEPT DODANE VRIJEDNOSTI KAO MJERA USPJEŠNOSTI POSLOVANJA

THE CONCEPT OF VALUE ADDED AS A MEASURE OF BUSINESS PERFORMANCE

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Sažetak: Cilj rada je kritički preispitati tri glavna koncepta dodane vrijednosti: osnovni koncept utemeljen na računu dobiti i gubitka, koncept ekonomske dodane vrijednosti i koncept tržišne dodane vrijednosti. Pri tome će se analizirati njihove prednosti i nedostaci u kontekstu mjerenja uspješnosti poslovanja poduzeća iz perspektive različitih dionika. Dodatno, rad pruža uvid u stvorenu neto dodanu vrijednost poduzeća čije dionice kotiraju na Zagrebačkoj burzi u te istražuje postoje li razlike s obzirom na izvještajnu godinu i prema vrsti djelatnosti.

Ključne riječi: dodana vrijednost, uspješnost poslovanja, dionici

Abstract: The aim of the paper is to critically review three main concepts of the value added: the basic concept based on the profit and loss account, the economic value added concept and the market value added concept. Both the advantages and disadvantages of those concepts in the context of measuring business performance from the perspective of different stakeholders will be discussed. In addition, the paper provides an insight into the value added of the companies whose shares are listed on the Zagreb Stock Exchange and investigates the differences in those values with regard to the reporting period and the business main activity.

Keywords: Value added, business performance, stakeholders

1. UVOD

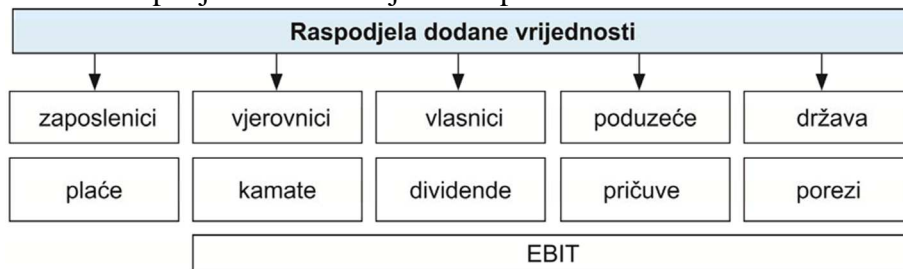
Suvremeno poslovanje i nove strategije poslovanja donose promjene zbog kojih klasični pokazatelji uspješnosti poslovanja nisu uvijek dovoljni da bi se na ispravan način i u potpunosti interpretirala postignuća nekog društva. Naime, [1] navodi da strategija kooperacije može višestruko povećati ostvareni prihod društva, ali to povećanje neće adekvatno oslikati promjene u ostvarenom rezultata. Jednako tako, u slučaju outsourcinga ostvareni prihodi poduzeća ostat će nepromijenjeni, iako će promjene u strukturi rezultata biti značajne. Navedeni razlozi doveli su do toga da se, uz postojeće, traže novi načini mjerenja postignuća nekog društva, među kojima značajno mjesto zauzima koncept dodane vrijednosti.

Dodana vrijednost je vrijednost koju društvo dodaje iz svojih vlastitih kapaciteta [2]. Pritom se stvorena dodana vrijednost ne odnosi samo na stvaranje nove vrijednosti, već i na povećanje postojeće vrijednosti [3]. Stvorena dodana vrijednost se dijeli prema namjeni, odnosno prema zainteresiranim dionicima, na način kako je prikazano sljedećom slikom:

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Slika 1: Raspodjela dodane vrijednosti prema zainteresiranim dionicima



Izvor: preuzeto od [3], str. 115

Dakle, dodana vrijednost predstavlja sveobuhvatnu mjeru uspješnosti poslovanja, odnosno postignuća poduzeća pružajući različite vrste traženih informacija svim zainteresiranim relevantnim dionicima. Prema [4] raspodjela stvorene vrijednosti mora se više brinuti o socijalnoj pravednosti, a dodana vrijednost kao mjera uspjeha predstavlja sposobnost stvaranja bogatstva poduzeća koje ne pripada isključivo vlasnicima kapitala. Poduzeće koje izvještava o dodanoj vrijednosti time ostvaruje sljedeće prednosti [5]:

- organiziranje zaposlenika: izvještavanje o dodanoj vrijednosti doprinosi dobroj „organizacijskoj klimi“ ističući doprinos zaposlenika u konačnom rezultatu poslovanja,
- određivanje nagrada i bonusa menadžmentu: izvještavanje o dodanoj vrijednosti sagledava doprinos svih dionika, a time i učinak menadžmenta,
- omogućuje preciznije planiranje: izvještavanje o dodanoj vrijednosti pruža jasnije sagledavanje mogućnosti društva, a time i preciznije planiranje,
- ukazuje na značaj poduzeća: iz izvještaja o dodanoj vrijednosti može se procijeniti važnost poduzeća za lokalnu zajednicu, za granu djelatnosti u kojoj posluje te utjecaj na ostala poduzeća,
- efikasnije pregovaranje sa sindikatima: izvještavanje o dodanoj vrijednosti daje jasnu sliku o postignuću poduzeća i o raspodjeli ostvarene dodane vrijednosti, što je dobro polazište za pregovore sa sindikatima,
- predviđanja investitora: izvještavanje o dodanoj vrijednosti sadrži informacije koje postojećim i potencijalnim investitorima mogu biti od koristi prilikom donošenja odluka o prodaji ili ulaganju u vrijednosnice,
- mjera uspješnosti: u slučajevima primjene tehnika kreativnog računovodstva, neto dodana vrijednost je bolja mjera uspješnosti od dobiti nakon oporezivanja.

Međutim, osim navedenih prednosti, u literaturi (npr. [6]) se spominju i nedostaci izvještavanja o dodanoj vrijednosti, kao što su npr. mogućnost nerazumijevanja izvještaja, osobito u slučajevima kad bogatstvo (mjereno dodanom vrijednošću) raste, a dobit ili neke druge sastavnice dodane vrijednosti padaju; ili neadekvatni ciljevi menadžmenta na način da pod svaku cijenu želi povećati dodanu vrijednost odnosno neke njezine dijelove.

2. KONCEPTUALNO ODREĐENJE DODANE VRIJEDNOSTI

Postoje tri osnovna koncepta dodane vrijednosti: osnovni koncept dodane vrijednosti utemeljen na elementima računa dobiti i gubitka; koncept ekonomske dodane vrijednosti (EVA) i koncept tržišne dodane vrijednosti (MVA).

Osnovni koncept dodane vrijednosti može se nazvati koncept bruto dodane vrijednosti. Glavna prednost bruto dodana vrijednost jest što onemogućava manipuliranje ostvarenim rezultatom kroz promjene amortizacijskih stopa. Međutim, [7] navodi da iako postoji mogućnost manipulacije prilikom obračuna amortizacije, neto dodana vrijednost jasnije iskazuje osnovicu

za obračun bonusa zaposlenicima od bruto dodane vrijednosti. Nadalje, ističe kako neto dodana vrijednost eliminira eventualne dvostruke efekte knjiženja amortizacije ako dolazi do razmjene dugotrajne imovine između poduzeća te kada je imovina podcijenjena, i jasnije iskazuje raspodjelu dobiti između vjerovnika, zaposlenika, vlasnika i države.

Uvjerenje da pokazatelji kao što su profitabilnost, zarada po dionici i sl. ne daju vjernu sliku rasta vrijednosti na tržištu dovelo je do pojave novih koncepata dodane vrijednosti među kojima je najznačajnija EVA. Pojam EVA-e prvi put su uveli Stern Stewart Management Services [8] te i danas predstavlja popularno mjerilo poslovne uspješnosti jer podatke iz računovodstva povezuje s tržišnim podacima o vrijednosti dionica. Temeljni model EVA-e u osnovi predstavlja rekonstruirani i prošireni model preostalog profita. Preostali profit kao mjera uspješnosti zasniva se na ideji da se realnim dobitkom za dioničare može smatrati samo dio povrata koji prekoračuje očekivani povrat. Pritom se očekivani povrat najčešće računa kao tržišna cijena uloženog vlastitog kapitala [9].

Tržišna dodana vrijednost (MVA) je mjera stvaranja vrijednosti tvrtke, koja se računa tako da se tržišna vrijednost poduzeća umanjuje za ukupni kapital [1]. Ukoliko je tržišna vrijednost kapitala (glavnice) veća od uloženog kapitala, MVA je pozitivna i to znači da je poduzetnik generirao novu tržišnu vrijednost za dioničare. Ukoliko je tržišna vrijednost kapitala (glavnice) manja od uloženog kapitala, MVA je negativna što znači da je poduzetnik smanjio tržišnu vrijednost imovine dioničara.

3. PREGLED DOSADAŠNJIH ISTRAŽIVANJA

Znanstvena istraživanja o konceptu dodane vrijednosti nisu brojna, te uglavnom obuhvaćaju države s dobro razvijenim tržištima kapitala, a odnose se na usporedbu kvalitete pokazatelja dodane vrijednosti s drugim pokazateljima u postupku procjene vrijednosti društva.

Prva relevantna istraživanja javljaju se krajem 20-tog stoljeća, kada su [10] napravili usporedbu pokazatelja EVA i pokazatelja „pročišćene“ ekonomske dodane vrijednosti (REVA - Refined Economic Value Added) kao mjera vrijednosti dionica. Oni su zaključili kako EVA dobro predviđa stvaranje vrijednosti, ali i predložili novu mjeru REVA kao teoretski superiorniju mjeru procjene uspješnosti poslovanja s gledišta kompenzacije rizika kapitala. Svojim zaključcima su započeli dugogodišnju debatu među znanstvenicima o idealnoj i najboljoj mjeri uspješnosti poslovanja koja traje i danas. Iako većina istraživanja dokazuje informacijsku korisnost pokazatelja dodane vrijednosti, postoji određeni broj radova koji daju različite, ponekad i dijametralno suprotne rezultate. Primjerice, [11] su uspoređivali efekte mjerenja vrijednosti društva poslovnim prihodima, rezidualnim prihodima i EVA-om te utvrdili, za razliku od ostalih istraživanja, bolju prediktivnost prve dvije varijable u odnosu na EVA –u. Do istih zaključaka su došli u svom radu iz prethodne godine [12], jednako kao i [13]. Nadalje, [14], [15], [16] i [17] su uspoređujući pokazatelje temeljene na dodanoj vrijednosti i tradicionalne računovodstvene pokazatelje u svrhu mjerenja povrata na dionice utvrdili kako ne postoji značajna razlika u informativnosti ovih dviju skupina pokazatelja.

Svakako, treba napomenuti kako su neki autori (npr. [18]) zaključili da se rezultati istraživanja o informativnoj vrijednosti pokazatelja dodane vrijednosti provedeni u državama s razvijenim tržištima kapitala ne mogu primijeniti na tranzicijske ekonomije država s nerazvijenim tržištima kapitala gdje se poduzetnici financiraju uglavnom iz bankarskih izvora, u koje spada i Hrvatska. U Hrvatskoj, tema dodane vrijednosti je do sada rijetko istraživana. Tako je [19] u svojoj disertaciji Računovodstvo dodane vrijednosti kao poluga unapređenja poslovne uspješnosti

istražila utjecaj elemenata dodane vrijednosti na profitabilnost i ukupnu poslovnu uspješnost poduzetnika, a [20] i [21] su analizirali utjecaj pojedinih komponenti dodane vrijednosti i njenih elemenata na profitabilnost društva [20], kao i utjecaj različitih politika upravljanja dodanom vrijednosti na uspješnost poslovanja [20]. U oba rada istraživanje je provedeno na svim hrvatskim poduzećima čije dionice kotiraju na Zagrebačkoj burzi, a dobiveni rezultati su pokazali kako je pokazatelj povrata na investirano pozitivno koreliran s elementima dodane vrijednosti [20]. Istraživanjem [21] je metodom ankete dokazano kako menadžeri različito rangiraju strateška područja upravljanja dodanom vrijednosti u ovisnosti o fazi poslovnog ciklusa u kojoj se poduzeće nalazi.

4. REZULTATI EMPIRIJSKOG ISTRAŽIVANJA DODANE VRIJEDNOSTI

Kako bi se pružio uvid u prosječnu stvorenu neto dodanu vrijednost poduzeća čije dionice kotiraju na Zagrebačkoj burzi u te utvrdilo postoje li razlike u visini dodane vrijednosti s obzirom na izvještajnu godinu i prema vrsti djelatnosti, iz liste izdavatelja društava čije dionice kotiraju na Zagrebačkoj burzi, javno dostupnoj na [22] selektiran je uzorak istraživanja. Prema podacima dostupnim na dan 30. lipnja 2014. godine, na Zagrebačkoj burzi d. d. kotirale su dionice ukupno 159 izdavatelja. Od tog broja isključeno je 7 fondova, 12 banaka, 5 osiguravateljskih društava zbog drugačije računovodstvene regulative, a posljedično tome i drugačijih financijskih izvještaja, te još 8 trgovačkih društava zbog nedostajućih ili nepotpunih financijskih izvještaja. Tako je formiran konačan uzorak od 127 društava što predstavlja 80% osnovnog skupa. Uzorak je relevantan, a dobiveni rezultati se mogu deklarirati kao pouzdani. Istraživanjem je obuhvaćeno razdoblje od 5 godina (2010-2014), odnosno 635 poduzeće-godina opažanja.

Stvaranje dodane vrijednosti mjeri se pokazateljem neto dodane vrijednosti po zaposleniku, koji se računa sljedećom formulom:

$$NDV_{i,t} = \frac{TZ_{i,t} + KTA_{i,t} + PD_{i,t} + ND_{i,t}}{Z_{i,t}} \quad (1)$$

gdje je $TZ_{i,t}$ - troškovi zaposlenika odnosno ukupna davanja zaposlenicima društva i u godini t ; $KTA_{i,t}$ - ukupne kamate koje je platilo društvo i u godini t , $PD_{i,t}$ - porez na dobit društva i u godini t ; $ND_{i,t}$ - neto dobit društva i u godini t i $Z_{i,t}$: broj zaposlenika društva i u godini t . Relativiziranjem iznosa ukupne neto dodane vrijednosti brojem zaposlenih osigurana je bolja usporedivost podataka među jedinicama promatranja.

Deskriptivna statistika uzorka prikazana tablicom 1. pokazuje da su u razdoblju od 2010. do 2014. godine selektirana poduzeća u prosjeku stvarala oko 150 tisuća kn neto dodane vrijednosti po zaposlenom. Međutim, vrijednost standardne devijacije ukazuje na veliku disperziranost podataka, pa je tako najmanja neto dodana vrijednost po zaposlenom zabilježena u 2013. godini i iznosila je oko -2 milijarde kn, dok je najveći zabilježeni iznos neto dodane vrijednosti od 6,2 milijardi kn stvoren u 2011. godini.

Tablica 1: Deskriptivna statistika neto dodane vrijednosti poduzeća u uzorku

| <i>N</i> | <i>Minimum</i> | <i>Maksimum</i> | <i>Prosjek</i> | <i>Standardna devijacija</i> |
|----------|----------------|-----------------|----------------|------------------------------|
| 635 | -2.049.853 | 6.235.249 | 149.245,15 | 438965,318 |

Izvor: izračun autora

Nastavno na opažanja u deskriptivnoj statistici, autori su pretpostavili da je globalna financijska kriza negativno utjecala na uspješnost poslovanja poduzeća, a time i na stvaranje dodane vrijednosti te je postavljena hipoteza da ne postoji statistički značajna razlika u prosječnom iznosu stvorene neto dodane vrijednosti po godinama. Kretanje neto dodane vrijednosti po godinama je prikazano tablicom 2.

Tablica 2: Prosječna dodana vrijednost poduzeća u uzorku u razdoblju 2010-2014

| <i>Godina</i> | <i>Prosječna neto dodana vrijednost</i> | <i>N</i> | <i>Standardna devijacija</i> |
|---------------|---|----------|----------------------------------|
| 2010 | 183.556,20 | 127 | 522630,555 |
| 2011 | 172.431,45 | 127 | 575257,748 |
| 2012 | 158.428,09 | 127 | 408577,673 |
| 2013 | 109.144,16 | 127 | 329672,566 |
| 2014 | 122.936,02 | 127 | 293942,007 |
| Total | 149.245,15 | 635 | 438965,318 |

Izvor: izračun autora

Kao što je vidljivo iz podataka prikazanih u gornjoj tablici, najveći prosječni iznos neto dodane vrijednosti po zaposlenom poduzeća su ostvarila u 2010. godini (183.556 kn), dok su najmanji prosječni iznos neto dodane vrijednosti po zaposlenom poduzeća ostvarila u 2013. godini (109.144 kn). Međutim, rezultati Kruskal-Wallisovog testa za nezavisne uzorke ($\text{sig}=0,930$) pokazuju kako navedene razlike nisu statistički značajne te se prihvaća nulta hipoteza o nepostojanju statistički značajne razlike u prosječnom iznosu stvorene neto dodane vrijednosti po godinama promatranja.

Autor [3] s motrišta tržišta, a time i krajnjih klijenata (kupaca), razlikuje djelatnosti koje neposredno ili posredno stvaraju dodanu vrijednost, te one djelatnosti koje ne stvaraju dodanu vrijednost. Djelatnost neposredno ili izravno stvara dodanu vrijednost ako se na proizvodu odnosno uslugama radi. Od toga su, međutim, izuzete reaktivne (prividne) usluge. Vlastita proizvodnja koja se ostvari za elektroničke mreže i medije ili pomoću njih naziva se i digitalnom dodanom vrijednošću. Procesi odnosno djelatnosti posredno ili neizravno stvaraju dodanu vrijednost ako su pretpostavka za obavljanje djelatnosti koje neposredno stvaraju dodanu vrijednost. Takve djelatnosti (npr. rekonstrukcija, prijevoz, obrazovanje i usavršavanje zaposlenika, upravljačko računovodstvo ili kontroling) procesni menadžment treba ograničiti na primjerenu mjeru. Treću skupinu čine djelatnosti koje ne stvaraju dodanu vrijednost jer ne stvaraju nikakvu mjerljivu korist za klijente i time predstavljaju rasipanje, kao primjerice svaki neželjeni rezultat (npr. škart), nepotrebne (suvišne) djelatnosti, usporavanja (faze ležanja, odnosno čekanja) i dodatni radovi. Temeljem ovih teorijskih pretpostavki formirana je hipoteza o nepostojanju statistički značajne razlike u prosječnom iznosu stvorene neto dodane vrijednosti prema djelatnostima. Zbirni podatci su prikazani u tablici 3.

Tablica 3: Prosječna dodana vrijednost poduzeća u uzorku po djelatnostima

| <i>Djelatnost NKD*</i> | <i>Prosječna dodana vrijednost</i> | <i>N</i> | <i>Standardna devijacija</i> | <i>Djelatnost NKD*</i> | <i>Prosječna dodana vrijednost</i> | <i>N</i> | <i>Standardna devijacija</i> |
|----------------------------|--|----------|----------------------------------|----------------------------|--|----------|----------------------------------|
| 1 | 77.234 | 42 | 109935,90 | 42 | 99.075 | 20 | 67649,88 |
| 3 | 61.391 | 2 | 12390,02 | 43 | 55.055 | 5 | 41800,66 |
| 10 | 139.725 | 68 | 96088,18 | 45 | 176.736 | 5 | 39745,08 |
| 11 | 140.297 | 15 | 160004,60 | 46 | -23.859 | 35 | 429880 |
| 13 | 45.910 | 5 | 12953,05 | 47 | 156.450 | 27 | 818721,80 |
| 14 | 32.476 | 15 | 25972,10 | 49 | 498.272 | 5 | 69609,05 |
| 16 | 48.838 | 5 | 62986,19 | 50 | 867.757 | 20 | 1811027 |
| 17 | 100.856 | 5 | 21313,54 | 51 | 94.698 | 5 | 143729,50 |
| 18 | 85.736 | 3 | 223924,40 | 52 | 137.455 | 15 | 51859,30 |
| 19 | 214.303 | 5 | 124415,30 | 55 | 132.455 | 158 | 231659,50 |
| 20 | 93.877 | 20 | 78829,95 | 58 | 100.929 | 7 | 90936,69 |
| 21 | 141.090 | 10 | 71150,77 | 61 | 353.707 | 10 | 188336,10 |
| 24 | -105.949 | 9 | 272758,70 | 68 | 557.798 | 10 | 776654,30 |
| 26 | 203.550 | 10 | 118369,30 | 70 | 162.795 | 23 | 81317,22 |
| 27 | 177.828 | 15 | 100707,80 | 71 | 73.511 | 10 | 327484,40 |
| 29 | 77.237 | 5 | 7499,64 | 72 | 115.025 | 5 | 258190,10 |
| 30 | 258.108 | 10 | 375931,50 | 79 | -25.634 | 5 | 49531,93 |
| 31 | 13.229 | 10 | 54340,50 | 93 | 192.348 | 5 | 20977,61 |
| 41 | 116.888 | 10 | 20896,58 | Total | 149.245 | 635 | 438965,30 |

Napomena: *oznaka djelatnosti označava odjeljke djelatnosti i preuzeta je iz [23]

Izvor: izračun autora

Iz prikazanih podataka je vidljivo da najveću neto dodanu vrijednost po zaposlenom stvaraju čiste uslužne djelatnosti, i to djelatnosti prijevoza (49 - Kopneni prijevoz i cjevovodni transport, 50 – Vodeni prijevoz) te djelatnosti poslovanja nekretninama (odjeljak 68) i telekomunikacije (odjeljak 61). Ove djelatnosti su kapitalno intenzivne i to posebno u sferi intelektualnog kapitala. Suprotno tome, radno intenzivne proizvodne djelatnosti proizvodnje tekstila (odjeljak 13), odjeće (odjeljak 14), prerade drva i proizvoda od drva (odjeljak 16) te proizvodnje namještaja (odjeljak 31) stvaraju najmanju prosječnu neto dodanu vrijednost po zaposlenom, što je i očekivano s obzirom na to da je njihovo primarno obilježje brojna i jeftina radna snaga. Međutim, u skupinu s niskim stvaranjem prosječne neto dodane vrijednosti po zaposlenom još spadaju i djelatnost trgovine na veliko (odjeljak 46) te djelatnost putničkih agencija i ostale djelatnosti povezane s njima (odjeljak 79). Rezultati provedenog Kruskal-Wallisovog testiranja za nezavisne uzorke ($\text{sig} \approx 0,000$) ukazuju kako su navedene razlike statistički značajne te se odbacuje nulta hipoteza da ne postoji statistički značajna razlika u prosječnom iznosu stvorene neto dodane vrijednosti među djelatnostima.

4. ZAKLJUČAK

Dodana vrijednost predstavlja sveobuhvatnu mjeru uspješnosti poslovanja poduzeća koja uključuje troškove osoblja, troškove financiranja odnosno kamata, porez na dobit i neto dobit te je zbog toga u praktičnom kontekstu informacijski korisna širokom krugu dionika. Iz znanstvene perspektive, istraživači kontinuirano iznalaze različite varijante pokazatelja dodane vrijednosti koji bi najbolje odražavali financijska postignuća poduzetnika, pa se govori o

konceptu bruto, neto, čiste, tržišne i/ili ekonomske dodane vrijednosti. Međutim, niti u praktičnom ni u znanstvenom smislu, ne postoji idealni oblik pokazatelja dodane vrijednosti, već svaki od njih ima svoje prednosti i nedostatke, ovisno o donositelju odluka i njegovim potrebama.

Ovaj rad pruža uvid u stvorenu prosječnu neto dodanu vrijednost poduzeća čije dionice kotiraju na Zagrebačkoj burzi te je istraživanjem dokazano da ne postoje razlike u visini dodane vrijednosti u razdoblju od 2010. do 2014. Godine s obzirom na izvještajnu godinu. S druge strane, utvrđeno je postojanje razlika u visini stvorene dodane vrijednosti među različitim djelatnostima, pri čemu čisto uslužne, kapitalno intenzivne, djelatnosti stvaraju u prosjeku znatno više dodane vrijednosti nego li proizvodne, radno intenzivne djelatnosti. Glavno ograničenje provedenog istraživanja je primjena deskriptivne statistike i neparametrijskih testova bez uporabe sofisticiranih ekonometrijskih metoda kako bi se dobili kvalitetniji rezultati. Međutim, s obzirom na to da je problematika stvaranja dodane vrijednosti vrlo rijetko istraživana, posebice u državama koje nemaju razvijeno tržište kapitala poput Hrvatske, unatoč spomenutom ograničenju ovaj rad ima znanstvenu vrijednost i doprinosi predmetnom području.

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LEAN POSLOVNI KONCEPT KAO SAVREMENA FILOZOFIJA UPRAVLJANJA

LEAN BUSINESS CONCEPT AS A CONTEMPORARY PHILOSOPHY OF MANAGEMENT

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Sadržaj: *Današnje poslovno okruženje jeste složeno i dinamično i da bi privredna društva opstala i razvijala se, neophodno je implementirati adekvatne upravljačke instrumente. Savremeni instrument koji je pokazao izuzetnu efikasnost za svrhe suočavanja sa sve izazovnijim uslovima poslovanja na tržištu jeste lean poslovni koncept. Suština ove popularne strategije poslovanja preduzeća ogleda se u obezbeđivanju zahtevane vrednosti od strane potrošača, eliminisanju svih oblika gubitaka, ali i u unapređenju znanja, veština i kompetencija zaposlenih. Cilj rada jeste da ukaže na važnost lean poslovnog koncepta i da se istakne značaj primene osnovnih principa na kojima se bazira lean filozofija upravljanja, sve u cilju uspešne pozicioniranosti preduzeća kako na domaćem, tako i na globalnom tržištu.*

Ključne reči: *Izazovni uslovi poslovanja, savremeni upravljački instrumenti, lean poslovni koncept, osnovni principi lean poslovnog koncepta*

Abstract: *Today's business environment is a complex and dynamic one, and for the companies to sustain and develop, it is necessary to implement appropriate management tools. A modern tool that has demonstrated exceptional efficiency for dealing with increasingly challenging business conditions on the market is a lean business concept. The essence of this popular business strategy of companies lies in the fact that it provides consumers a value which they required, eliminate all forms of loss, but also improve the knowledge, skills and competencies of employees. The aim of the paper is to point out the significance of the lean business concept and to emphasize the importance of applying the basic principles on which the lean philosophy of management is based, with the aim of successful positioning of the company both on the domestic and the global market.*

Keywords: *Challenging business conditions, contemporary management tools, lean business concept, basic principles of a lean business concept*

1. UVOD

Savremeni uslovi privređivanja, prožeti dinamičnim promenama poslovnog okruženja bitno utiču na savremena privredna društva, namećući im kao imperativ permanentnu borbu za sticanje konkurentne prednosti i suočavanje sa sve izazovnijim uslovima poslovanja na tržištu. Dinamičnost koja predstavlja jednu od glavnih karakteristika savremenog poslovnog okruženja jeste uzrok radikalnih promena u poslovanju preduzeća. Sve veći zahtevi kupaca u pogledu poboljšanja karakteristika proizvoda, jačanje konkurencije na domaćem i

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inostranom tržištu kao i tehničko – tehnološke promene predstavljaju razloge udaljavanja od dosadašnjih i usvajanja novih poslovnih koncepata među kojima spada i *lean* koncept poslovanja. Ova savremena filozofija upravljanja karakteriše se obezbeđivanjem tražene vrednosti za kupce, brzom isporukom proizvoda, unapređenjem kvaliteta, skraćanjem reagovanja na zahteve kupaca, uz eliminisanje svih oblika gubitaka u proizvodnji, ali i u svim ostalim funkcijama u preduzeću. Da bi se postigla i održala konkurentska prednost, neophodno je pažljivo razmotriti i primeniti osnovne principe *lean* koncepta, o kojima će posebno biti reči u nastavku rada.

Jedno od glavnih ograničenja za prihvatanje i usvajanje *lean*-a odnosi se na karakteristike korporativne kulture konkretne zemlje. Zato je za uspešnu implementaciju *lean* filozofije upravljanja neophodno da postoji tim zaposlenih koji će promenom načina razmišljanja, usvajanjem nove kulture i novih radnih metoda prihvatiti primenu novog koncepta, kako na operativnom, tako i na strategijskom nivou. Što se tiče Republike Srbije, sistem menadžmenta sporo i teško podržava uvođenje radikalnih promena u poslovanju preduzeća. Eventualno veće i brže promene u korporativnoj kulturi mogu se očekivati nakon pristupanja naše zemlje Evropskoj uniji. U kontekstu tih promena, mogu se implementirati savremeni sistemi upravljanja, čija uspešnost primene zavisi od nivoa i kvaliteta adaptacije kulturnim obeležjima Srbije.

Imajući u vidu navedeno, rad sadrži, osim uvoda i zaključka, tri celine. Nakon uvoda, u drugom delu rada biće objašnjena suština *lean* poslovnog koncepta. Treći deo rada odnosi se na principe ovog poslovnog koncepta koje treba poštovati, budući da se time obezbeđuje uspeh preduzeća u turbulentnim uslovima privređivanja. U četvrtom delu rada ukazaćemo na neka ograničenja praktične primene ovog koncepta kada je u pitanju poslovanje preduzeća u Republici Srbiji.

2. LEAN POSLOVNI KONCEPT

Lean poslovni koncept postao je uobičajen poslovni jezik na ekonomskoj sceni tokom 80-tih i 90-tih godina prošlog veka. Naime, upotreba ovog poslovnog jezika počela je da se masovno širi nakon objave knjige „Mašina koja je promenila svet“. Eminentni stručnjaci iz ove oblasti James Womack, Daniel Jones i Daniel Roos analitički su opisali sistem proizvodnje koji su razvili Eiji Toyota i Taiichi Ohno u kompaniji Toyota Motor u Japanu. Izvršni menadžeri ove kompanije navode da su bili inspirisani posetom američke kompanije Ford Motor zahvaljujući čijem upravljačkom modelu je industrija Japana uspela da doživi ekonomski i društveni oporavak i preuzme vodeću poziciju u proizvodnji automobila.

Womack i Jones objašnjavaju *lean* poslovni koncept kao najmoćnije oružje koje kreira vrednost uz eliminisanje gubitaka u preduzeću [1]. Popularnost *lean* poslovnog koncepta poslovanja u naučnim istraživanjima i poslovnoj praksi jeste razumljiva, ako se ima u vidu osnovni postulat ovog koncepta, a to je težnja za ostvarivanjem što većih rezultata sa što manje korišćenih ljudskih resursa, opreme, vremena i prostora za proizvodnju proizvoda, a u cilju zadovoljenja istančanih potreba kupaca.

Osvrtom na razvoj *lean* poslovnog koncepta, može se jasno uočiti da je ovaj model poslovanja u početnim fazama razvoja bio primenjivan samo na operativnom nivou. Njegova tendencija bila je usmerena ka poboljšanju efikasnosti i smanjenju troškova u proizvodnom procesu, kako bi se stvorila očekivana vrednost za kupce. Na taj način je ova vrednost postala srce *lean* poslovnog procesa [2]. Cilj *lean* poslovnog koncepta poslovanja na operativnom nivou bio je eliminisanje resursa, isporuka tražene vrednosti kupcima kao i dostizanje performansi koje su

unapred postavljene. Ovaj sistem proizvodnje težio je ka protoku nedovršene proizvodnje u malim količinama, bez zaustavljanja procesa proizvodnje i bez skladištenja [3]. Prethodno se moglo postići proaktivnim sagledavanjem događaja, budući da ispravljanje grešaka i uklanjanje nedostataka onda kada su već nastali predstavlja skup, dugotrajan i komplikovan proces. U tom smislu, središte upravljanja izmešteno je sa faze proizvodnje na fazu planiranja i dizajna. Ovo iz razloga što u ranim fazama životnog ciklusa proizvoda nastaje oko 70 – 80% ukupnih troškova kojima je najlakše manipulirati u ovom vremenskom periodu.

Evoluiranjem *lean* poslovnog koncepta, središte upravljanja pomeren je sa operativnog na strategijski nivo. Na ovom nivou, cilj je bio razumeti vrednost koja se obezbeđuje za kupce, u smislu kvaliteta proizvoda, troškova, funkcionalnosti i brzine isporuke [4]. Menadžeri preduzeća zajedno sa neposrednim izvršiocima bili su usredsređeni na kontinuirana poboljšanja poslovnih aktivnosti u cilju stvaranja vrednosti. „Šta se danas stvarno želi, sutra već postaje stvarna potreba“ [5]. *Lean* poslovni koncept trudi se da obezbedi visoku diferenciranost proizvoda i pruži relativno brz odgovor na zahteve sa tržišta. Jedan od glavnih „krivaca“ novonastalog stanja može biti prodorna tehnologija, koja je u stalnoj transformaciji i napredovanju i, kao takva, dovodi do promena u ponašanju kupaca.

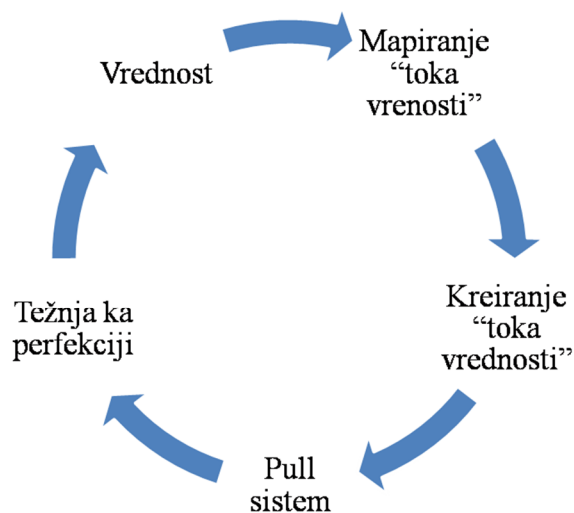
Prilagođavanjem novom ekonomskom ambijentu, japanski stručnjaci iz kompanije Toyota Motor promišljeno su postavili sistem upravljanja koji stavlja akcenat na važnost kupaca i na predmet njihovog interesovanja i potreba. Inovativno preduzeće koje pre ostalih unapredi postojeći ili uvede potpuno novi proizvod ima mogućnost da pobedi konkurenciju i stekne lidersku poziciju na tržištu. Upravo iz tih razloga, menadžment u *lean* poslovnim sistemima treba da bude svestan značaja brzine kreiranja proizvoda i plasiranja istih na tržište. S tim u vezi, istraživači i konsultanti predložili su određene kritične faktore uspeha koji pomažu preduzeću u generisanju uspeha poslovanja [6]. Jedan od značajnih faktora poslovnog uspeha jeste, svakako, vreme koje se odnosi na skraćivanje trajanja poslovnog procesa, sa namerom redukovanja troškova i unapređenja kvaliteta obavljanja poslovnih aktivnosti preduzeća.

3. PRINCIPI *LEAN* POSLOVNOG KONCEPTA

U uslovima poslovanja koje karakterišu globalizacija, internacionalizacija biznisa, skraćeni životni ciklus proizvoda, primena visokih tehnologija i kompjuterizovanih sistema proizvodnje, fleksibilne organizacione strukture preduzeća, razvijanje partnerskih odnosa i rasta pomoćnih aktivnosti, sve je teže postići, očuvati i unaprediti konkurentsku prednost [7]. Upravo iz ovih razloga preduzeća neprestano streme ka kreiranju savršene vrednosti, postizanju visokog nivoa kvaliteta i otklanjanju nepotrebnih postupaka i otpada. *Lean* proizvodna filozofija predstavlja integraciju svih aktivnosti koje stvaraju vrednost, a sam “tok vrednosti” mora biti organizovan na osnovu *lean* principa. Principi koji su razvijeni u okviru *lean* poslovnog sistema postavili su James Womack i Daniel Jones u svom radu [1] i oni podrazumevaju sledeće:

- 1) definisanje vrednosti za svaku familiju proizvoda sa stanovišta krajnjeg potrošača (Specify Value),
- 2) identifikovanje svih aktivnosti “toka vrednosti” za svaku familiju proizvoda i eliminisanje aktivnosti koje ne dodaju vrednost (The Value Stream),
- 3) rangiranje aktivnosti koje dodaju vrednost i jasno definisanje faza u kojim se stvara vrednost, tako da finalni proizvod dođe do krajnjeg potrošača bez mnogo prekida (Flow),
- 4) usklađivanje toka proizvoda sa zahtevima potrošača (Pull system) i
- 5) jasno definisanje vrednosti za potrošače, adekvatno identifikovanje i uspostavljanje “toka vrednosti” i otklanjanje suvišnih postupaka i gubitaka resursa u toku (Perfection).

Na Slici br. 1 prikazani su principi na kojima počiva *lean* poslovni koncept [8].



Slika 1. Lean principi
(Dostupno na: <https://www.lean.org-WhatsLean/Principles.cfm>)

Vrednost je uvek definisana na osnovu preferencija i interesovanja potrošača za određeni proizvod, a čije identifikovanje zahteva poznavanje svih procesa preduzeća u kojima se kreira vrednost za potrošače. Za koje vreme se proizvod može proizvesti i isporučiti? Koja je cena proizvoda? Koji su drugi važni zahtevi koji moraju biti ispunjeni u vezi sa proizvodom? Ovo su samo neka od pitanja čije odgovore menadžer treba da postavi kao ciljeve kojima treba da teže svi zaposleni koji su uključeni u kreiranje i isporuku proizvoda. Na ovaj način zahtevi potrošača mogu da budu zadovoljeni, a njihova lojalnost osigurana.

Drugi princip vezuje se za uspostavljanje "toka vrednosti". On podrazumeva sve aktivnosti koje se obavljaju u preduzeću, počev od onih koje dodaju vrednost, do onih koje ne dodaju vrednost. "Tok vrednosti" obuhvata sve korake i procese koji su uključeni, najpre, u kreiranje ideje proizvoda, preko njegove proizvodnje do momenta isporuke krajnjim potrošačima. U pitanju je složen postupak koji podrazumeva razmatranje obima, strukture i dinamike proizvodnje, pakovanja i isporuke, ali i utvrđivanje faza rada i njihovog trajanja, u kojim fazama se eventualno javljaju zalihe, gde su tačke kontrole, koje je vreme ciklusa itd. Najbolja tehnika za identifikovanje "tokova vrednosti" u preduzeću jeste mapiranje. Proces mapiranja "toka vrednosti" predstavlja crtanje olovkom na papiru protoka materijala i informacija. Ono se može obavljati u fazi dizajna, nabavke, proizvodnje, u oblasti ljudskih resursa, administraciji i isporuci proizvoda. Cilj jeste identifikovati svaku aktivnost koja ne stvara vrednost, a zatim pronaći načine za njeno otklanjanje. Proizvodnja pojedinačnih proizvoda ili familije proizvoda u preduzeću predstavlja osnov za sastavljanje mape sadašnjeg stanja, čije unapređenje kasnije predstavlja bazu za kreiranje mape budućeg stanja. Suština mape budućeg stanja jeste da se prikaže proces poslovanja koji se želi dostići da bi želje, potrebe i zahtevi potrošača bili blagovremeno zadovoljeni. Nakon toga sastavlja se plan realizacije unapređenja, definiše se način njihovog merenja i određuje vremenski period u kome se unapređenja moraju postići. Mapiranje "toka vrednosti" nekada se naziva reinženjering procesa. Može se reći da ova faza procesa rezultira boljoj spoznaji čitavog poslovanja preduzeća.

Razumevanje odvijanja protoka proizvoda od suštinskog je značaja za eliminisanje različitih vrsta otpada. Suština trećeg principa trebalo bi da se odnosi na aktivnosti koje omogućavaju da se faze u kojima se stvara vrednost nadovezuju jedna na drugu, bez ikakvih prepreka, kako bi

se proizvod nesmetano kretao prema krajnjem potrošaču. Da bi se obezbedio nesmetani tok proizvoda potrebno je mnogo napora, budući da postoje određeni poslovni procesi koji iziskuju više vremena i resursa. Nepotrebna trošenja koja nastaju povezana su sa mašinama, materijalom, zaposlenima, ali i drugim resursima. Na kraju, celokupan tok proizvoda treba da bude ponovo sagledan kako ne bi došlo do dupliranja pojedinih aktivnosti koje mogu da dovedu do prekida i nepotrebnog čekanja [1].

U uslovima primene pull sistema nalazi se težnja preduzeća ka obezbeđivanju protoka proizvoda tako da se početak proizvodnje započne onog trenutka kada se dobije određeni signal sa tržišta. Umesto principa koji su se koristili u klasičnim pristupima u proizvodnji, a koji su podrazumevali unapred napravljeni raspored, pristup "vučenja" omogućava da se proizvod počne proizvoditi onda kada kupac pošalje narudžbinu. Pull sistem poslovanja odnosi se na proizvodnju jednog po jednog komada u skladu sa signalima sa tržišta. Da bi se to postiglo potrebno je da postoji velika fleksibilnost i efikasna komunikacija u lancu vrednosti, s obzirom na to da su krajnji potrošači ti koji daju znak kada treba početi sa proizvodnjom tražene vrednosti.

Pobornici *lean* poslovnog koncepta trude se da postignu ništa manje od savršenstva. Put ka perfektnom procesu dešava se korak po korak, a ambicije su usmerene ka tome da se jednom dobijena pažnja kupaca zadrži u dužem vremenskom periodu. Nepopustljiva želja za stalnim usavršavanjem procesa navodi menadžere i neposredne izvršioce da tragaju dalje, analiziraju više i vrše izmene češće od svojih konkurenata.

4. NEKA OGRANIČENJA PRAKTIČNE PRIMENE LEAN POSLOVNOG KONCEPTA U POSLOVANJU PREDUZEĆA U REPUBLICI SRBIJI

Primena *lean* poslovnog koncepta jeste relativno složeno područje razmatranja u praksi kako inostranih, tako i domaćih preduzeća. U zavisnosti od stanja računovodstvenog sistema, primena ovog koncepta prihvaćena je brže ili sporije u zemljama poput Velike Britanije, Nemačke, Sjedinjenih Američkih Država, Australije, izuzimajući Japan koji se smatra kolevkom ovih koncepata. Međutim, za mali broj preduzeća može se reći da su svoje poslovanje bazirala u potpunosti po *lean* principima, budući da većina njih primenjuje samo pojedine tehnike koje im najviše odgovaraju [9]. Menadžeri se susreću sa određenim poteškoćama prilikom inicijalne primene ovog koncepta poslovanja, te je potrebno edukovati ih i pripremiti za transformaciju sistema upravljačkog računovodstva. U tradicionalno orijentisanim preduzećima radnici su naviknuti da samo rutinski i šablonski izvršavaju zadatke, bez iskazivanja dužnog nivoa poštovanja menadžera prema tim zaposlenima. U *lean* preduzeću potrebno je promeniti takvu poslovnu kulturu i naučiti zaposlene da misle i sami donose sud o postignutim rezultatima [9].

U Republici Srbiji primena *lean* poslovnog koncepta predstavlja relativno novo područje razmatranja, te stoga nije zabeležena potpuna primena ovog koncepta poslovanja u našoj zemlji. Prema istraživanjima sprovedenim u nekim preduzećima u Srbiji utvrđeno je da je samo 19,4% ispitanika upoznato sa *lean* konceptom (od toga 13% ispitanika je na rukovodećim pozicijama), dok je samo 5,6% odgovorilo da preduzeća u kojima su zaposleni primenjuju ovaj koncept [10].

I pored toga, deo menadžera kojima je *lean* koncept poznat, nije dovoljno upoznat sa njegovim pretpostavkama i principima. Jedan od hendikepa srpske privrede kada je u pitanju primena *lean* koncepta jeste nedovoljna zainteresovanost menadžera za njegovu primenu, uglavnom zbog obima posla i straha od nepoznatog [9]. Implementacija ovog principa jeste poželjna, ako

se ima u vidu da je Srbija zemlja sa ograničenim resursima, te je ušteda svake novčane jedinice dragocena. Da bi se smanjila rasipanja sa kojima se suočavaju srpska preduzeća, potrebno je pokrenuti *lean* transformaciju i kreirati *lean* kulturu koja teži ka postizanju većih i boljih rezultata sa što manje korišćenih resursa i gubitaka. Mišljenja smo da treba agresivnije promovisati *lean* principe i ukazati na to da je uz pomoć njihove primene moguće smanjiti rasipanja, povećati efektivnost i efikasnost zaposlenih što u krajnjem može dovesti do značajno boljih performansi preduzeća. Smatramo da je neophodno dodatnim seminarima konsultantskih firmi detaljnije upoznati menadžere srpskih kompanija sa konceptom preduzeća čiji je cilj povećanje aktivnosti koje dodaje vrednost, uz eliminisanje gubitaka i aktivnosti koje to ne čine. Edukacijom i dodatnim informisanjem moguće je podržati menadžere i lidere u pokretanju *lean* filozofije upravljanja. Uz pomoć *lean* transformacije treba aktivirati menadžere i udaljiti ih od mišljenja “Mi smo to uvek radili na taj način” i umesto toga razviti razmišljanje “Mi možemo to da uradimo na drugačiji, savremeniji način”.

Da bi poboljšala svoje poslovanje, bilo bi poželjno da preduzeća u našoj zemlji modifikuju postojeću poslovnu kulturu. Međutim, činjenica koja obeshrabruje jeste da menadžeri i zaposleni teško i sporo menjaju metodologiju rada i način razmišljanja. Ukoliko se žele postići bilo kakve promene, bilo bi potrebno edukovati zaposlene i adekvatno ih obučiti tako da shvate da će im nova poslovna kultura doneti pomake u poslovanju. Zaposleni moraju biti predvođeni menadžerima koji i sami razumeju potrebu za promenama i koji pokazuju interesovanje za novi koncept poslovanja. Ali, verovatno iz straha od nepoznatog i navika na ustaljeni način rada oni pružaju otpor na sam pomen promena [9]. Međutim, ne smemo zanemariti činjenicu da nacionalna kultura i te kako ima uticaja na korporativnu kulturu. Nacionalna kultura određuje profil korporativne kulture preduzeća koja u okviru nje obavljaju svoje aktivnosti. Pomenuti uticaj se najviše ostvaruje upravo preko zaposlenih. Kao pripadnici određene nacionalne kulture, po zapošljavanju, oni u firmu unose svoja verovanja, vrednosti, norme, stavove. Kao što je teško zamisliti jednu japansku kompaniju koja posluje po principima drugačijim od nacionalne japanske kulture, isto tako je teško zamisliti srpsku kompaniju koja posluje po normama koje se razlikuju od nacionalne srpske kulture, a još teže zamisliti da takva kompanija posluje po poslovnim principima kao što su japanski. Neka istraživanja [11] pokazuju da inostrane firme, koje su postale većinski vlasnici preduzeća u Srbiji imaju problem da oblikuju nove forme korporativne kulture, u kojima je prisutna promocija drugačijih vrednosti, od onih koje su prisutne u srpskoj nacionalnoj kulturi. Sa druge strane, neka domaća preduzeća u stranom vlasništvu uspela su da razviju korporativnu kulturu sa novim vrednostima organizacije i poboljšaju konkurentnu poziciju na domaćem i inostranom tržištu [11].

Ono što bi, takođe, trebalo uraditi jeste više pažnje posvetiti krajnjem potrošaču i oslušivati njegovu interesovanja i zahteve koje izražava, pogotovo kada je u pitanju cena proizvoda po kojoj je on spreman da kupi isti. Nažalost, potrošačima se u Republici Srbiji ne pridaje dovoljno značaja kao u drugim zemljama i ne uvažavaju se njihove želje i mogućnosti kada je u pitanju prodajna cena proizvoda [9]. Dokaz za to jeste taj što je u Republici Srbiji troškovni pristup (metod “troškovi plus”) aktuelan u većini preduzeća, naročito u proizvodnim, prilikom formiranja prodajnih cena, gde se na iznos troškova dodaje određeni procenat marže, odnosno profita. Određivanje cena u *lean* preduzeću kreće se u suprotnom smeru. Naime, prodajna cena utvrđuje se na bazi procene spremnosti kupaca da plate određene atribute proizvoda. Ovaj tržišno orijentisani pristup jeste instrument efikasnog upravljanja preduzećem i treba biti u većoj meri zastupljen u praksi srpske privrede.

5. ZAKLJUČAK

Napredovati, nadmašiti konkurenciju i trijumfovati u svom poslovanju deviza je renomiranih preduzeća današnjice. Uslovi globalizacije i svakodnevni uslovi poslovanja nameću preduzeću kao imperativ konkurentnost i suočavanje sa sve izazovnijim uslovima poslovanja na tržištu. Okruženje u kome današnja preduzeća posluju jeste složeno i nužno uslovljava transformaciju poslovnog sistema preduzeća. Učestale modifikacije u tržišnoj areni tangiraju skoro sve sektore funkcionisanja preduzeća, među kojima spada i računovodstveno – informacioni sistem. Središte savremenog upravljanja odlikuju pojava i implementacija naprednih i savremenih koncepata, pristupa, instrumenata, budući da su klasični koncepti upravljanja postali neefikasni i nepodobni u savremenim uslovima privređivanja. Upravo iz tih razloga pojavili su se novi koji su usmereni ka postizanju kontinuiranih unapređenja preduzeća, a jedan od njih jeste upravo *lean* poslovni koncept.

Danas se sa sigurnošću može reći da je *lean* koncept poslovanja jedan od najsnažnijih alata koji stoji na raspolaganju menadžerima u cilju stvaranja vrednosti i eliminisanja otpada u bilo kom preduzeću. Nakon prihvatanja ovog koncepta u kompaniji Toyota Motors, *lean* je privukao pažnju mnogih menadžera u evropskim i američkim kompanijama. Ipak, uprkos brojnim pokušajima, postoje slučajevi kada preduzeća nisu uspela uspešno da primene ovaj poslovni koncept, jer nisu uspela da održe kontinuitet u primeni nakon inicijalne implementacije projekta.

Sa druge strane, u pojedinim proizvodnim preduzećima, ali i u uslužnim institucijama (turističkim organizacijama, zdravstvenim institucijama, državnim organima) *lean* koncept upravljanja uspešno je primenjen u poslovanju. Zato bi menadžeri srpskih kompanija trebalo više pažnje da posvete ovom konceptu i da ga posmatraju kao jedan od mogućih načina rasta i razvoja preduzeća u savremenim uslovima poslovanja.

Preduzeća koja jednom prihvate *lean* način razmišljanja teže da zadobijenu pažnju kupaca zadrže neograničeno, vodeći računa o kvalitetu i funkcionalnosti proizvoda, ali i redukciji troškova, budući da na taj način preduzeće istrajava u sopstvenoj egzistenciji i održavanju dugoročne pozicije na tržištu.

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UTICAJ PROMENA NA GLOBALNOM TRŽIŠTU NA PRIRODU I FUNKCIONISANJE SAVREMENIH LANACA SNABDEVANJA

THE EFFECTS OF GLOBAL MARKET CHANGES ON CHARACTERISTICS AND FUNCTIONING OF CONTEMPORARY SUPPLY CHAINS

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Sadržaj: Cilj ovog rada je da ukaže na činjenicu da proces globalizacije generiše brojne izazove koji značajno utiču na poslovne performanse savremenih lanaca snabdevanja kao i na celokupnu logiku snabdevanja kompanija. Odlaganje finalizacije proizvoda i implementiranje savremenih klada tehnologija u sve većoj meri determinišu fleksibilnost i profitabilnost lanaca snabdevanja. Analizom referentnih naučnih izvora i uočavanjem ovih tendencija u poslovnoj praksi, biće prezentovan rastući interes akademaca i praktičara za identifikovanjem efekata procesa globalizacije na procese i aktivnosti članova lanaca snabdevanja.

Ključne reči: globalizacija, lanac snabdevanja, odlaganje finalizacije proizvoda, klada računarstvo.

Abstract. The aim of this paper is to point out the fact that the process of globalization generates numerous challenges which have a great influence on the business performance of the contemporary supply chains as well as on the whole logic of supplying the company. Postponement of product finalization and implementation of modern cloud technology determine the flexibility and profitability of the supply chains. Analyzing reference scientific sources and noticing these tendencies in business practise, we will present academicians and practitioners growing interests to identify the effects of the process of globalization on the processes and activities of the supply chain members.

Keywords: globalization, supply chain, postponement, cloud computing.

1. UVOD

Lanci snabdevanja, kao jedan od svetih gralova epohe globalizacije i stubova globalne ekonomije, menjaju konkurentsku klimu, kao i način miksovanja resursa kompanija u cilju profitabilne isporuke vrednosti kupcima. Digitalne tehnologije sve više determinišu misiju lanaca snabdevanja.

Kreativno i na zahtevima globalnog tržišta zasnovao strukturiranje i unapređenje fleksibilnosti lanaca snabdevanja značajno doprinose njihovoj konkurentnosti i profitabilnosti. Danas lanci snabdevanja ne mogu postići svoje ciljeve bez oslanjanja na sve širi spektar sofisticiranih digitalnih tehnologija.

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Pod uticajem digitalnih tehnologija, usluge koje pružaju globalni lanci snabdevanja postaju vrednije, pristupačnije i jeftinije. Implementacija klad računarstva ili računarstva u oblaku (eng. *cloud computing*) omogućava razvijanje profitabilnih digitalnih mreža snabdevanja. Klad računarstvo pruža putem Interneta infrastrukturu, platformu i softverska rešenja za celokupan lanac snabdevanja. Među najpoznatijim prodavcima usluga klad računarstva su: Microsoft, Amazon, IBM, Salesforce i SAP. Zahvaljujući klad platformama, kompanije mogu uspešno identifikovati trendove na globalnom tržištu i proceniti njihove uticaje na poslovne performanse lanaca snabdevanja.

2. FUNKCIONISANJE LANACA SNABDEVANJA U USLOVIMA GLOBALIZACIJE TRŽIŠTA

Lanci snabdevanja teže stalnom unapređenju svoje konkurentnosti. Nažalost, lanci snabdevanja su pod uticajem brojnih faktora globalnog okruženja čiji su efekti kumulativni.

Proces globalizacije svetskog tržišta ima duboke implikacije na upravljanje kompanijama, kako na strateškom tako i na operativnim nivoima. Ovaj proces ubrzava rast međunarodne razmene dobara kao i stvaranje globalnih konkurenata i šansi kroz takmičenje lanaca snabdevanja u okviru grane [1]. Pored toga, on tera kompanije da se sve više okreću ka globalnim izvorima snabdevanja, kupcima lociranim širom sveta kao i da *sele proizvodnju* mnogih inputa i proizvoda u zemlje u razvoju i zemlje u tranziciji, prvenstveno zbog smanjenja troškova proizvodnje i povećanja prodaje proizvoda. Na primer, kompanija Nike ima 554 fabrike u 42 zemlje širom sveta. Najveće fabrike su locirane u Vijetnamu, Kini, Šrilanki, Japanu, Sjedinjenim Država, Brazilu i Indoneziji. Godine 2013. kroz njen lanac snabdevanja proteklo je oko 900 miliona proizvoda. Svaki proizvod polazi iz nekog od 57 distributivnih centara i do krajnjih kupaca stiže preko mreže od 140.000 maloprodajnih objekata [2]. Kompanija NIKE vešto upravlja proizvodnim kapacitetima. Ona je jedan od pionira u svojoj grani u implementiranju strategije outsouringa proizvodnje. Do kraja fiskalne 2013. godine 70-76% proizvodnje odeće i 85% proizvodnje obuće Kompanija je outsorovala, što je omogućilo da smanji troškove po jedinici proizvoda za 0,15\$. Nike je danas najmanje američki proizvođač.

Ubrzanjem procesa globalizacije šire se šanse za rast nacionalnih ekonomija. Ovaj proces je u značajnoj meri pomogao Kini da poveća stopu rasta svoje ekonomije. Od 1970-ih godina Kina je postala svetska radionica. Već 2010. godine ova zemlja je imala 18,9% učešća u svetskoj proizvodnji, i prvi put je prevazišla učešće SAD koje je iznosilo 18,1%. U 2015. godini Kina je postala najveći svetski izvoznik (2,27 mlrd. \$) [3]. Dve godine kasnije ukupan izvoz ove zemlje iznosio je oko 2,7 biliona \$ a trgovinski suficit 422,5 mlrd. \$. I pored toga što od 2011. godine Kina ne ostvaruje dvocifrenu stopu rasta privrede, njen doprinos rastu globalne ekonomije 2017. godine (koja je iznosio oko 3,1%) [4] dostigao je čak 35% [5]. Prema procenama eksperata Blommerg-a [6], BDP Kine će u 2018. godini iznositi oko 13,2 biliona \$ i biće veći od BDP-a 19 zemalja evrozona (12,8 biliona \$). Ipak, i u 2018. godini ekonomija SAD će ostati najveća ekonomija sveta (nominalni GDP će iznositi oko 20,41 biliona \$), koju poziciju drži još od 1871. godine. Dvadeset vodećih ekonomija sveta generiše oko 81% svetskog nominalnog GDP-a dok ostale 172 zemlje generišu svega 19% svetskog GDP-a [7]. Ovi podaci ukazuju na napredovanje procesa globalizacije svetskog tržišta. U takvim uslovima logično je konstatovati da je teško pronaći lanac snabdevanja čije se aktivnosti u nekom trenutku ne prostiru izvan nacionalnih granica.

Proces globalizacije svetskog tržišta je podstakao implementaciju koncepta održivosti, koji zahteva od kompanija da ne rešavaju samo ekološke i ekonomske probleme već da budu i

društveno odgovorne. Analogno tome, ovaj proces je povećao odgovornost menadžera za upravljanje održivim lancima snabdevanja, u cilju dugoročnog poboljšanja njihovih ekonomskih performansi.

Globalizacija svetskog tržišta zahteva šira istraživanja samih lanaca snabdevanja. Pored istraživanja „ortodoksnih“ aspekata procesa, aktivnosti, operacija i funkcija lanaca snabdevanja, prisutna su i istraživanja socijalnih i ekoloških problema kojima su izložene njihove kompanije [8, str. 46-62].

Predmet najnovijih istraživanja su globalni društveni i etički problemi, poput dečjeg rada, uslova rada, mita i korupcije i njihovi uticaji na funkcionisanje lanaca snabdevanja. U svetu se još uvek zloupotrebljava dečiji rad. Prema proceni Međunarodne organizacije rada oko 152 miliona dece je prinuđeno da radi u nezdravim i opasnim uslovima iscrpljujuće poslove na plantažama, u rudnicima, fabrikama i na drugim mestima [9]. Mnoga od njih za svoj rad dobijaju svega nekoliko centi po satu.

Organizacija za ljudska prava Amnesty je početkom 2016. godine optužila 16 kompanija (Apple, Microsoft, Samsung, Sony i dr.), za zloupotrebu dečjeg rada. Teško je poverovati da kompanije koje ostvare profit od 125 mlrd. \$ na globalnom nivou ne mogu da provere odakle dolaze ključni materijali za njihove proizvode!

3. REORGANIZACIJA I SIMPLIFIKACIJA LANCA SNABDEVANJA - NAČIN REAGOVANJA KOMPANIJE STARBUCKS NA IZAZOVE GLOBALNOG OKRUŽENJA

Kompanija Starbucks je 2008. godine prilikom otvaranja svojih prodajnih objekata širom sveta, autsorsovala mnoge aktivnosti lanca snabdevanja. Međutim, ona se nije fokusirala i na uspešno upravljanje svojim lancem snabdevanja, što je za posledicu imalo rast operativnih troškova i troškova funkcionisanja celokupnog lanca snabdevanja. Polovina isporuka nije stizalo na vreme a više od 50% prihoda lanca snabdevanja je odlazilo na pokrivanje troškova eksternih pružalaca transportnih usluga [10]. Kada je Peter Gibbons²⁵ preuzeo odgovornost za upravljanje lancem snabdevanja, predložio je nekoliko koraka kako bi Kompanija ponovo postala visoko profitabilna. Prvi korak bio je *planiranje reorganizacije*. Analizom lanca snabdevanja kompanije Starbucks, Gibbons je utvrdio da su čak 65-70% troškova transporta i isporuka izazvali eksterni provajderi logističkih usluga, koji su snabdevali njene prodajne objekte zaliham. Reorganizacija je omogućila Starbucks-u da jasno definiše uloge lanca snabdevanja i smanji troškove snabdevanja svojih prodajnih objekata.

Drugi korak je pojednostavljenje složene strukture lanca snabdevanja Starbucks-a. To je podrazumevalo da svaka aktivnost pripadne jednoj od četiri osnovne funkcije lanca snabdevanja: *planiranje, nabavka, proizvodnja i isporuka*. Krajnji rezultat je visoko centralizovani sistem logistike koji omogućuje Kompaniji da bolje upravlja svojom globalnom logističkom mrežom.

Konačno, Gibbons-ov tim je identifikovao efikasne rute za snabdevanje prodajnih objekata, što je omogućilo Kompaniji da značajno smanji ukupne troškove lanca snabdevanja. To je rezultat ocene svih aktivnosti lanca snabdevanja na bazi merenja: 1) sigurnosti u poslovanju, 2) isporuka na vreme i redosleda popune zaliha, 3) ukupnih troškova lanca snabdevanja, i 4) ušteda [11].

²⁵ Izvršni potpredsednik globalnog lanca snabdevanja kompanije Starbucks od 2008. do 2012. godine.

Od odlaska Gibbonsa, Starbucks je nastavio da osavremenjava svoj lanac snabdevanja. Kompanija razvija vertikalno integrisani lanac snabdevanja, što znači da je uključena u svaki njegov deo - od proizvodnje zrna kafe do prodaje šoljice kafe potrošačima. Starbucks direktno saraduje sa oko 300.000 proizvođača kafe širom sveta. Obavezao se samo na fer prodaju kafe (eng. *Fair Trade coffee*).²⁶ Razvio je čak i vlastite standarde koji se odnose na kafu i proizvođače kafe (*Coffee and Farmer Equity - C.A.F.E. standards*) i Smernice za nabavku kafe (*Coffee Sourcing Guidelines - CSG*), koje zahtevaju od dobavljača da ispune etičke standarde i standarde održivosti i kvaliteta. Ove smernice štite prava radnika i osiguravaju da svi uzgajivači kafe imaju sigurne i humane uslove rada.

Dobavljači kompanije Starbucks se osećaju integralnim delom njenog lanca snabdevanja. Bliski odnosi i česte komunikacije između ove kompanije i dobavljača čine njen lanac snabdevanja manje osetljivim na velike poremećaje na globalnom tržištu, kao što je preveliki rod kafe ili manjak radnika. Nakon što uzgajivači odaberu i upakuju sirovu kafu, prevoznici je dovoze do okeanskih brodova koji je zatim prevoze do šest skladišta u SAD-u i Evropi. U tim skladištima vrši se prženje i pakovanje kafe a zatim i otpremanje do osam centralnih i 48 regionalnih distributivnih centara Starbucks-a. Aktivno učešće Kompanije u lancu snabdevanja garantuje da će kafa biti pržena i pakovana na isti način kao i da će distributivni centri dobijati kafu koja im je potrebna kako bi mogli da blagovremeno izvrše više od 70.000 narudžbina sedmično.

Evidentno je da je globalizacija značajno uticala na upravljanje lancem snabdevanja kompanije Starbucks ali da je njoj u isto vreme omogućila da proširi mogućnosti nabavke, da smanji zalihe i poveća konkurentnost na globalnom tržištu. Ipak, složenost upravljanja lancem snabdevanja raste kako Starbucks povećava prisustvo na globalnom tržištu. Kompanija se u velikoj meri oslanja na digitalnu tehnologiju kako bi osmislila strategije za upravljanje globalnim lancem snabdevanja. Vešto upravljanje lancem snabdevanja značajno pomaže Kompaniji da uspešno posluje u oko 75 zemalja sveta. Kompanija koristi automatizovani informacioni sistem koji omogućuje praćenje tražnje, zaliha i kapaciteta u realnom vremenu. Zato je u stanju da po potrebi brzo prilagodi svoje planove i operacije.

4. ODLAGANJE FINALIZACIJE PROIZVODA U CILJU POVEĆANJA FLEKSIBILNOSTI LANACA SNABDEVANJA NA GLOBALNOM TRŽIŠTU

Globalna logistička industrija sve više zavisi od dužine, strukture i uspešnosti funkcionisanja lanaca snabdevanja. Ukupni prihodi ove industrije u 2014. godini su procenjeni na 4,3 biliona \$ [12], što je oko 10% globalnog GDP-a. Situacija se razlikuje u razvijenim i u nerazvijenim zemljama. Ipak, intenziviranje globalne konkurencije između lanaca snabdevanja u sve većoj meri zahteva fleksibilnost logističkih aktivnosti kompanija i njihovo uspešnije infiltriranje u tokove globalnog biznisa.

Ukoliko članovi lanca snabdevanja prognoziranje i planiranje tražnje isključivo temelje na predviđanju i špekulaciji, dolazi do povećanja i zastarevanja zaliha kao i do povećanja ukupnih troškova lanca snabdevanja. Zbog toga menadžeri lanaca snabdevanja sve više razvijaju i implementiraju strategiju odlaganja finalizacije proizvoda.

²⁶ *Pravedna trgovina* (eng. *fair trade*) je oblik nadzirane trgovine pri kojoj su cene za proizvode koje se plaćaju proizvođačima obično više od cena na svetskom tržištu. Tako se proizvođačima želi omogućiti veći i pouzdaniji prihod u odnosu na konvencionalnu trgovinu. Pravedna trgovina podrazumeva plaćanja "fer cena" za proizvode, kao i poštovanje socijalnih i ekoloških standarda u proizvodnji.

U eri globalizacije problem proliferacije proizvoda²⁷ postaje sve veći. U cilju rešavanja ovog problema, kompanije često razvijaju i implementiraju strategiju odlaganja finalizacije proizvoda. Poslovna praksa pokazuje da ova strategija sve češće opredeljuje profitabilnost savremenih lanaca snabdevanja [13].

Bez obzira što se dugo u literaturi spominje, strategija odlaganja finalizacije proizvoda se tek u novije vreme koristi u lancima snabdevanja. Sa razvojem tehnologije, posebno informacione, transportne i proizvodne, strategija odlaganja finalizacije proizvoda postaje sve privlačnija i pristupačnija. Menadžeri vrlo često implementiraju ovu strategiju u lancima snabdevanja u cilju povećanja njihove fleksibilnosti i dugoročne profitabilnosti.

5. ZNAČAJ KLAUD PLATFORMI ZA ČLANOVE LANCA SNABDEVANJA

Klaud računarstvo transformiše lance snabdevanja u digitalne mreže snabdevanja. Ono omogućava: efikasnije fizičke tokove proizvoda, usluga, informacija i novca; i povećanje kompetencija svih njegovih članova. Godine 2017. oko 1,754 milijardi ljudi je koristilo klaud servise za skladištenje podataka. Prema nekim procenama [14], 2020. godine približno 2,3 milijarde ljudi će smeštati podatke u kladu. Posledica toga biće povećanje broja potrebnih data centara za skladištenje podataka.

Broj korisnika klaud servisa za skladištenje podataka se povećava. Osim toga, korisnici skladište sve više podataka u kladu. Zakonodavstvo SAD omogućava obaveštajnim agencijama da pristupe podacima američkih državljana, čak i kada su skladišteni u inostranstvu. Zbog velikih ovlašćenja obaveštajnih agencija u SAD-u u pogledu pristupanja podacima građana, Evropa postaje sve popularnija za skladištenje podataka u kladu. Povećava se potreba za korišćenjem evropskih klaud servisa sa tzv. nultim nivoom znanja (eng. *zero-knowledge cloud services*) kao što je npr. Tresorit. Najveća prednost Tresorit-a je to što je jedan od retkih i najboljih cloud servisa s nultim nivoom znanja. To znači da korisnik sam postavlja lozinku bez znanja Tresorit-a.

Članovi lanaca snabdevanja se sve više povezuju putem klaud servisa.²⁸ Takvi servisi omogućavaju članovima lanca snabdevanja da reše probleme koji se tiču: *predviđanja i planiranja tražnje, nabavke materijala, upravljanja zalihama, dizajniranja i razvoja proizvoda i upravljanja logistikom* [15].

Korišćenjem klaud platformi kompanije u lancu snabdevanja mogu da unaprede svoje usluge kroz međusobnu saradnju. Kompanije to mogu da postignu prikupljanjem podataka od partnera, njihovim procesiranjem i prognoziranjem tražnje za svakog od njih. Rezultat takve saradnje mogu biti upozorenja partnera u lancu snabdevanja na potencijalne promene tražnje, tako da oni mogu blagovremeno odgovoriti tim promenama.

Korišćenjem klaud platformi proizvođač može da odabere najpovoljnije dobavljače i da sa njima zaključi povoljne ugovore o nabavci materijala.

Organizacije sve više tehnologiju bar-kodiranja zamenjuju tehnologijom radio-frekventne identifikacije. Integrisanje tehnologije radio-frekventne identifikacije sa klaud sistemom za

²⁷ Ponuda više proizvoda radi kontrole kanala distribucije i prostora na policama u prodajnim objektima. Na primer, kompanija Procter&Gamble nudi nekoliko proizvoda na svakom tržišnom segmentu te tako onemogućuje manjim kompanijama da se takmiče na svim segmentima.

²⁸ Bilo koji resurs koji se pruža putem Interneta.

centralizovano upravljanje podacima omogućava identifikovanje i praćenje zaliha u celokupnom lancu snabdevanja [16].

Informacioni sistem za upravljanje logistikom, koji se realizuje preko klauđa, omogućava: a) da korisnici paralelno zahtevaju i putem interneta pristupaju, preko svojih mobilnih telefona i računara, aplikacijama u klauđu bez direktnih interakcija između ljudi, b) *spajanje računarskih resursa* većeg broja provajdera usluga tj. više zakupljenih jedinica, s različitim fizičkim i virtualnim resursima, koji se dinamički dodeljuju i uklanjaju prema zahtevima korisnika a koji ne znaju lokaciju tih resursa, c) da provajderi mogu da brzo, u nekim slučajevima i automatski, proporcionalno povećaju ili smanje resurse kada oni više nisu potrebni korisnicima, kao i da omogućće korisnicima da resurse mogu kupiti u bilo kojoj količini i u bilo koje vreme, i d) postizanje linearnosti u pogledu brzine odgovora na zahteve i količine podataka sa kojima se manipuliše tj. da sistemu stoje na raspolaganju u svakom trenutku dovoljno računarskih resursa bez obzira na promenu njegovog opterećenja.

6. ZAKLJUČAK

Globalizacija je kompleks dinamičnih procesa (ekonomskih, političkih i kulturnih) koji se ispoljavaju kroz postepeno ukidanje ograničenja protoka robe, usluga, ljudi i ideja među različitim kompanijama, državama i delovima sveta. Involviranje kompanija u lance snabdevanja sve je više vođeno njihovim željama za pružanjem odgovora na izazove procesa globalizacije i profitabilnim osvajanjem novih tržišta.

Globalizacija značajno determiniše strukturu, dužinu, misiju i fleksibilnost lanaca snabdevanja kao i prirodu samog procesa upravljanja lancima snabdevanja. Ipak, za lance snabdevanja, globalizacija nije mehanizam za puku kontrolu sveta od strane multinacionalnih korporacija. Ona je sve više ambijent u kojem lanci snabdevanja mogu da se suoče sa različitim rizicima ali i da profitabilno realizuju svoje procese i aktivnosti.

Klaud računarstvo omogućava pružanje putem Interneta infrastrukture, platformi i softverskih rešenja za jednostavno, transparentno, precizno i profitabilno korišćenje resursa celokupnog lanca snabdevanja. Klauđ računarstvo značajno transformiše modele poslovanja članova lanca snabdevanja pružanjem podataka, analiza, mobilnosti i pristupa socijalnim medijima. Konačno, kompanije članovi lanca snabdevanja sve više koriste klauđ računarstvo u cilju integrisanja resursa i pružanja veće vrednosti potrošačima na tržištima širom sveta.

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THE ROLE OF IT IN SHARING ECONOMY

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Abstract: *The satisfied customer is a customer who appreciates the quality of the goods and recommends them to others. Achieving a high level of satisfaction is not easy, as he is often well-informed, is awaiting something new, looking for new experiences and ways of accessing it, and prefers their easy availability, often on demand. The way how to improve its level of satisfaction lie in exploiting the innovation potential that creates the basic assumptions for the sharing economy. That economy does not create a new market or new customer; its aim is to offer services in other ways or in a new form with the aim of satisfying as widely as possible the various demands of customers. According to the fact that especially young people prefer to use new ways of acquiring their experiences or to change their forms of availability, the use of technologies and IoE takes your place in these processes. The obstacle in this process is the need to rapidly develop smart solutions or devices that meet the broad customer requirements. In this process, spin-off and start-up companies, supported by university centers, have a great potential as they directly support the transfer of the latest technology into practice. Summarizing the best practice solutions, we should eliminate barriers to successful spin-offs and start-ups as well as SME business doing in competitive practice. Using the model of sharing economy, the effectiveness of such economics will be researched. Using the survey method, we will evaluate the views of 189 managers of Slovak SMEs and 26 managers of IT companies related to the enhancing the use of innovation opportunities and IT potential in practice. Comparing our research results with the results of similar research activities in the EU, we try to identify the barriers that prevent them from exploiting their potential using the statistical methods and validation tools that are part of the SPSS program. Based on the analysis and synthesis of research outputs, we summarize the recommendations how to improve customer satisfaction with ways of sharing goods using the latest technology and related platforms.*

Keywords: *sharing economy, spin-off company, knowledge and technology transfer, innovation, platform B2B*

1. INTRODUCTION

People are closer to each other due to professional internet applications. It creates the possibilities to perform their activities not only in a classical way, but they also look for opportunities to perform them in a virtual environment as well. The better conditions for sharing technology, the more effective the levels of sharing. The development of intelligent smart solutions, tools and devices can meet customer requirements more complexly. New solutions should be available from different environments using unified solutions for different

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applications. However, their development and application in practice will not succeed without the need, willingness and ability of small producers to offer, develop and exploit their potential in the processes of production innovated services or products offered as a supplementary service upon request at the point of provision of the main service or consumption of the product. In these processes, start-up and spin-off companies, supported by university centers, have a great potential as they directly support the transfer of the latest technology into practice. Therefore, nowadays more attention should be paid to research on the conditions for setting up and supporting the business of doing spin-off companies in regions where innovation potential is lower or completely absent [1]. In this paper we should evaluate the conditions for the development of sharing economy from the point of view of IT transfer management as a tool for sharing products or services in that way of doing business. We will also examine the use of economics model as a tool for management of environment for sharing technologies.

2. THEORETICAL BACKGROUND OF SHARING ECONOMY

Many people, especially young people, prefer the dynamic availability of products and services provided in non-traditional ways, where they prefer to:

- discover something new, to gain experience in a non-traditional way, or as an effort to give up the traditional models to meet their own needs,
- change in lifestyle, value, especially preferred by younger generations, which is associated with property ownership, product gathering, etc., and more preferring to survive something new.

They are able to share their own goods and services with each other, either for free or for financial or non-financial remuneration [2]. This fact is confirmed by the results of recent studies [3], where about two-thirds of respondents said they are heading towards a less materialistic lifestyle, and four fifths of respondents believe that rent has greater advantages than ownership. Despite of, there will exists a small part of customers, whose do not prefer sharing something in their own ownership.

2.1. MACROECONOMIC AND MICROECONOMIC CONDITIONS OF SHARING ECONOMY

From these points of views, we can state, that a sharing economy does not create a new market, it mainly supports the use of non-traditional ways of products or services providing. People can switch from being only consumers of classically supplied goods or services to those who drive new services enriched with new experiences or events. They can become designers as well, in multifunctional use of former buildings and spaces, or in sharing cultural activities. For them it is more acceptable to have an access to products or services when they need it, which means moving away from owner-right to user-rights [4].

The sharing economy can also support the growth of employment and enterprise performance. In the key sectors of sharing economy, such as finance, accommodation, transport, small domestic services and professional services, the number of operations is expected to increase up to twenty times in comparison with the situation in 2016 [5]. It is due to the opportunity of employing people in productive age, post- as well as pre-productive age, as they are not only consumers but also providers or intermediaries of the various products or services.

The new ways of experiences gathering give them more realistic information related to the products or services properties, marketing-oriented communication of brand and its ownership [6]. They will also feel better in their decision-making.

In the sharing economy also occurs the disadvantages because of the conditions for doing business are different, which is why an unequal competitive environment is formed [7]. In order to increase the benefits of that economy, it is necessary to deal with various specific issues such as regulatory treatments, conditions for sharing or easily to dispose with non-traditional means of accessing products or services.

There is a need to regulate the interconnection between supply and demand from the point view of:

- customers, where it is the comfort associated with the fact that information and communication are mediated via the computer screen or mobile display, the tool of connectivity support is continuously updated, has its on-line support as well as support for its own transactions.
- the information platform, where it is possible to reach a much wider range of customers; the modern communication platform minimizes the level of information asymmetry where both parties have high quality information for their transactional decision making. It should also lead to savings on transaction costs [8], as follows:
 - search and information costs - platforms offer fast and often clear and comparative product and service information to help reduce loss due to lack of information or knowledge of the product or service,
 - negotiation costs - communication and contract costs,
 - implementation costs - shipping agreement, payments, insurance, guarantees, etc.

It is also necessary to address the microeconomic problem where the modern sharing economy combines two unfamiliar partners. In the case of private transactions, the success of cooperation between the partners strongly depends on the degree of fairness and responsible behavior towards each other based on mutual personal relationships. The trust among partners is affected by the degree of personal acquaintance, which is why it is necessary to be respectful and anticipate the behavior of its partner. As business support as well as communication between partners and providers is based on the electronic business support that is fully utilized, it is also possible to exploit the application as a service quality regulator. Many applications offer the ability to perform back-up control by which platform providers try it maps the dissatisfaction of their clients. In such developed applications, there is a possibility that unsatisfied clients can report their negative experiences, record incidents, and so on. This option addresses problems associated with poor quality of service or product properties that may occur due to the ways of their provision. In such situations, it is important to build on the support of a single electronic platform and to develop an area where electronically-supported applications or other means will be easily accessed.

2.2 THE BASIC CONDITIONS FOR SHARING ECONOMY DEVELOPMENT

In a sharing economy, the common discussion is focused on the problem, how to create a platform for sharing the involved elements and how to support their accessibility.

If companies want to benefit from these ways of business doing, it is necessary to provide the broader accessibility of:

- modern information and communication technologies,
- modern information platforms and internet,
- large databases accessing for sharing of public goods (products and services),
- technological solutions, as well as smart devices – smart phones that connect people to each other and create an opportunity to accessing professional internet applications much closer,

- availability of the on-line payment systems [9].

It is very important to bring innovations to traditional areas and sectors as well. It is necessary to deal with the issue of technology transfer and make them accessible for a wide range of users, where the new ways of ICT and services transfer will be formed and practiced, and forming changes in B2B platform delivering. The new solutions may support:

- new style of communication so that both the provider does not restrict the applicant,
- intermediaries will dispose with new opportunities: not only to try the role of basic and also supporting or additive services providing.

In particular, the possibilities of technical intelligence can be exploited.

2.3. TECHNICAL INTELLIGENCE AS A DRIVER OF COMPETITIVE INTELLIGENCE

In the end, the business environment evolves more dynamically, where continuously expanding markets, globalization, or new technologies are the driver of changes, as in [10] it is shown. It is also confirmed the opinion of Porter [11], that the importance of technology and also innovative business processes and countries can significantly improve the quality of the business environment. Together these digital technologies, often cumulatively referred to as the Internet of Everything (IoE), which has a profound effect on how organizations and industries are transforming, often as a result of new technology-enabled business models [9]. As in [12] it is stated, technical intelligence allows to identify and exploit opportunities arising from technical and scientific changes. It allows also to identify and respond to threats of such changes. Stability in this area is as much as needed. As it was stated in [13], the time horizon of technical intelligence was usually an interval of six to twelve months in the past and five or more years into the future.

At present, the university research and scientific departments and their staff, which devote considerable resources and capacity to research and development activities, represent a progress in the field of technological development and delivery.

As the research and development sector is not continuously linked to business practice, it is difficult to create the right conditions for technology and knowledge transfer to practice. The basic barriers as excessive bureaucracy at academic centers that prevents the private sector from entering the funding of science, are occurred. The same situation is in the private sector also due to the lack of long-term investments in science and research. The goal is to convert technology and knowledge potential into usable products or services.

In this space it increases the role of spin-offs or start-ups as a driver of technology and knowledge transfer into the practice.

3. POSSIBILITIES OF BUSINESS AND LEGISLATIVE SUPPORT OF SHARING ECONOMY

In spite of the fact that it is difficult to precisely set up the concept of new companies as well as the criteria for creating the best conditions in accordance with the support of sharing economy, we have tried to identify the possibilities such as spin-offs or start-ups represent.

It is due to their innovative, scientific and technological potential, which is a guarantee for future success of such companies. Therefore, we have tried to define spin-offs and start-ups and their role in sharing economy.

3.1. THE ROLE AND TYPOLOGY OF SPIN-OFFS AND START-UPS

As states in [15], the small companies – so called spin-offs play the special role, which consists in research and knowledge transfer. Spin-off is a newly founded company co-founded by a university or research laboratory that owns the licensed technology and applies it to the market with the aim to leverage available academic knowledge for commercialization (firstly established by [16]). This company is a profit-oriented entity. This fact is confirmed by many authors [1], [17] - [19] who state that spin-off founding helps to create an innovative company that guarantees collaboration with universities and transfer knowledge and technology from universities to practice. Both factors, the founding of spin-off companies and technology licensing, are the basic assumptions for successful technology transfer into real practice. Certain universities, however, do not use the term spin-off but rather use the term start-up or the term employee's enterprises designed to commercialize intellectual property (IP). Spin-out is also often used instead of spin-off, however, upon closer analysis, both of these terms have a similar meaning.

Many authors have tried to identify common aspects in different spin-off definitions. In [20], spin-offs were divided into two categories:

- spin-offs where the inventor takes part in the business position (active commercialization of proprietary inventions),
- spin-offs where entrepreneurs are not inventors but hold rights for the use of university inventions (position of inventor from the university is replaced by a manager from the practice).

Another important feature is that the university still remains as a co-owner in a given spin-off company, but that company can flexibly and freely create your own - unique intellectual property (IP). The term spin-off is also described as an innovative company established for the use and further development of academic IP. They state that the definition of spin-off within academic conditions reflects various differences in the perception of requirements related to IP commercialization as well as differences in maturity of business environment in different countries. As we have found, in order to define the concept of spin-offs, it is possible to find many different criteria and approaches to their categorization. As in [14] stated, it is possible to identify 14 common elements or categorization criteria of different definition and 46 spin-offs categories. These fundamentally mentioned categorization could be extended with new categorization criteria with respect to the sector in which the spin-off company operates, its business orientation or in terms of company size according to the total number of employees, etc. Next factor that is more important in terms of properties spin-offs is the region. The region where the academic institution is located determines the access to the rights of the various parties, also the IP rights, the type and definition of spin-off and start-up companies. We can state that the intellectual property of academic institutions can be viewed as public, private but also social resources. The advantage is, that many spin-off definitions are usually incorporated into internal directions, regulating IP protection and the ways of commercialization at a particular university. At the end, we can summarize, it is more important to pay attention to the regulatory framework, as well as to create acceptable legal or technical conditions for doing business in sharing economy, which is also an obstacle to linking the school and business sectors.

3.2. LEGISLATIVE SUPPORT IN THE AREA OF SHARING ECONOMY

The European Union (EU) has its own legal system, whose main rules and principles are laid down in the founding Treaties [22]. The EU can adopt legislative acts, which member states must comply with and apply. As we have seen, neither the EU nor its own countries have yet defined a single legislative framework that would govern the area of the sharing economy as a whole. In this area, divided into two parts - the platforms of the sharing economy and users of platforms, however, regulatory measures can be found to help producers create better conditions for the operation and support of business activities in the electronic virtual space. In the study [23], authors summarized a set of measures concerning the legal and regulatory framework for the European Economic Area (EEA), as follows: Directive for E-commerce 2000/31/EC, Services Directive 2006/123/EC, Rights Directive 2011/83/EC, The Unfair Commercial Practices Directive 2005/29 / EC. In 2013, Proposal for a Regulation of the European parliament and for the council laying down measures concerning the European single market for electronic communications and to achieve a Connected Continent, and amending Directives 2002/20/EC, 2002/21/EC and 2002/22/EC and Regulations (EC) No 1211/2009 and (EU) No 531/2012, were introduced [22]. In 2015, the European Commission launched the Digital Single Market (DSM) strategy. According to this strategy, DSM is a comprehensive market in which people and businesses can trade, innovate and cooperate legally, safely and at an affordable price. This sector covers areas such as digital marketing, e-commerce and telecommunications. The Single Digital Market seeks to maintain the rules of fair competition, consumer protection and the removal of geographic and copyright issues [24]. In 2016, the European Commission presented also a Single Market Strategy (SMS), where the main objective was to unlock the full potential of the single market for the European Economic Community established by the states of the European Union [25].

There were also presented policy recommendations that should lead to a reduction of barriers that prevent to growth of the sharing economy in the European Union [26].

In the following part we want to identify the role of the tool that can be used to create better sharing conditions.

4. METHODS

In these processes, the question is: What is more important: what is the role of the internet and traditional business doing? What is the role of their relationship to innovations? What the role of spin-off companies is in digital economy? We try to find answers to these questions. As the basis for conclusions, we provide an evaluation of the research results obtained by performing various economic analyses of indicators of digital economy, spin-off functioning, and also by the assessment of attitudes of small and medium enterprises to innovations and IT adaptation. These research activities were carried out in the framework of partial research activities of research institutes of the partner universities (University of Žilina, Institute of Management Systems in Poprad, Matej Bel University, and Banská Bystrica) between 2015-2017. We also compared our research results with similar issue, provided in SMEs in EU. To assess the current situation in the attitude of SMEs towards innovation and implementation of new IT as a support of their business activities we will evaluate the opinions of 189 SME managers and 26 representatives of IT companies (data collection by electronic survey and by structured interviews). The data analysis and hypotheses validation will be performed using the statistical methods and validation tools of the SPSS program, as well as methods of deduction and synthesis.

5. RESEARCH RESULTS

Next, we review the current state of the sharing economy and predict its future development. We analyze the available indicators and propose suitable recommendations.

5.1. REVISION OF THE SHARE INDICATORS ESTIMATION OF SHARING ECONOMY

As outlined in [7], if we want to identify the database for the analysis of the sharing economy, it is necessary to analyze the number of unregistered entrepreneurs from the small and micro enterprises sector provided. In the revision of the estimates, their share in the labor market is estimated comparing the outputs of the labor sample survey based on data from the Czech Statistical Office and the Labor Office statistics. The aim of this analyze is to review the ways in which the share of producers deliberately not registered on the labor market is estimated and to assess their verity. The evaluation and comparison of the verity of indicators of sharing economy was provided by using the statistical methods and validation tools that are part of the SPSS program.

To identify the database for the analysis of the sharing economy, it is necessary to build on the revisions of National accounts statements (32). This document describes the impact of changes in methods and changes in data sources within the so-called "major revision of annual national accounts". In the context of revisions, the search and identification of leakages is in the form of so-gray economy. Although the sharing economy is not exactly the same as the gray economy, these two sets overlap in many ways.

It is recommended to follow the estimates of:

- the impact of accommodation services on GDP in the form of dwelling services - imputed rent. In this case, it is necessary to use the stratification method of the imputed rent estimation rather than the unit cost method (UCM). there are determined the size of the imputed rent according to a) the size of the municipality, b) the type of the building, c) the size of the apartment, d) the equipment;
- producers deliberately not registering - The estimated values are obtained using the analysis of data collection obtained from the pilot study "Exhaustiveness of Czech National Accounts" - from the mutual project of Eurostat and the Czech Statistical Office. The calculation of the values of the indicators is done in two steps (using the old method). First, there are calculated the percentages obtained by the industry sector. Secondly, it is estimated the amount of unofficial unemployment on the basis of the labor market disparity (according to the average labor productivity in the sector). In 2010, the estimated value of the variance was 2.8% (employees in full-time equivalents) in CZK 78.513 million, in EURO 2.606 million [27]. The results of the new method are also obtained in two phases. First, it is provided a comparison of generic productivity with productivity that businesses achieve by using credibly leading accounting. Secondly, the estimated value is calculated according to labor market disparities.

³² This basic revision was published by the Czech Statistical Office on 30 September 2011 and preceded the main revision in 2014. The main reasons for the revisions were to ensure greater comparability of macro-aggregates in the Czech Republic with respect to the transition to NACE classification. The most important conclusion is the underestimation of the performance of the Czech economy (2-3% absolute in GDP) in the past.

The results of the second method are surprising. The deviation is 35.5% (CZK 103.689 million, in Euro 3.442 million €) for employers and 13.4% (CZK 110.846 million, in Euro - 3.679 million €) for self-employed persons. As pointed out, the new method allows for more accurate estimates of differences in monitored parameters.

5.2. AN ANALYSIS OF SUPPLY AND DEMAND IN A SHARING ECONOMY

If we want to assess the situation in terms of demand and supply in the sharing economy, what services or products are preferred, it should be realized using the survey analysis of respondents' opinions that are involved in providing the related services or products. The aim of the survey should be to find out what the real state is and what the dynamics of changes in supply and demand in the sharing of the economy by sector, including an estimate of the size of individual markets is.

On the basis of the survey, target groups should be identified precisely, offering both demand and supply in sharing economic services, according to the age, level of education, personal attitudes and preferred values by them, etc. Survey should be performed anonymously between the population aged over 15.

Design of data collection for the quantitative sample survey of the sharing economy, we propose to ensure the following methodological parameters, which will ensure a sufficiently precise description of respondents:

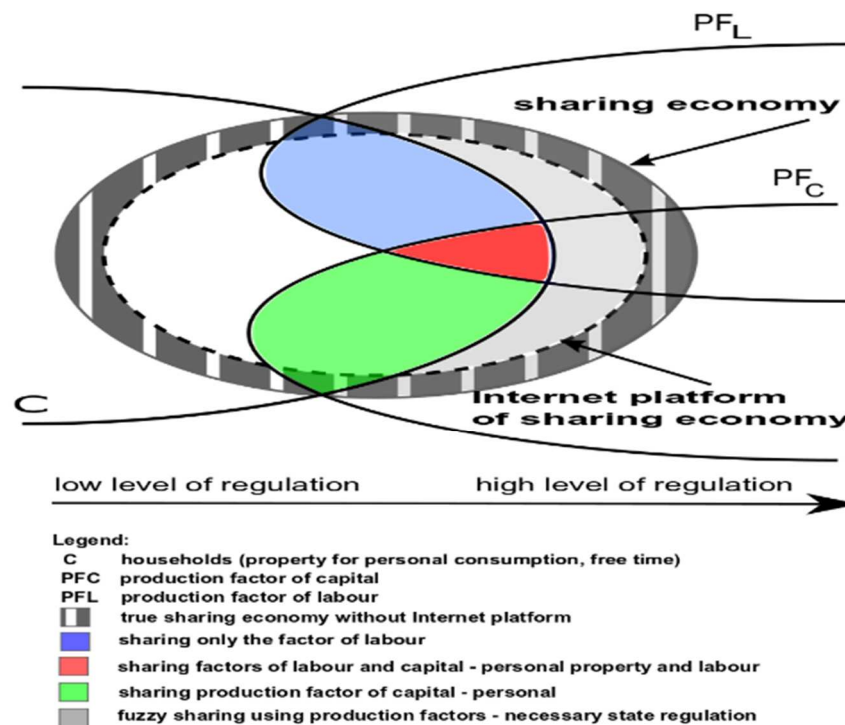
- Number of respondents: 3000 respondents.
- The research should be stratified with the same probability of selection in the four main strata according to the size of the municipality (less than 1,000, 1,000 - 9,999, 10,000 - 99,999, and 100,000 and more).
- Selection method: random selection,
- First of all, a face-to-face interview, where recording respondents' views in the paper questionnaire should be captured
- Estimated cost of the survey: 1,000,000 CZK without VAT, it means approximately 33,33 € without VAT.

In the future, we suggest to use the alternative data collection provided by Computer Assisted Telephone Interviewing or by electronic survey.

5.3. THE ANALYSIS OF REGULATORY INDICATORS

Using the Conceptual Sharing Economy Model - CSEM [7], the effectiveness of sharing economy should be researched. It is the basic model that allows to point out the behavior and relationships of economic entities. It is based on the theory of economic subjects and describes the relations of these entities in the environment of sharing the economy. It should be also used to providing recommendations for regulatory measures in the context of public interest theory and enforcement of socially effective behavior (including the limitation of negative externalities). Its basic schema is the Figure 1.

Figure 1. Conceptual Sharing Economy Model - CSEM



The basis of the model is the largest concentric circle - a true sharing economy. It means that it is an economic model based on the sharing or leasing of products, as opposed to their exclusive and indivisible ownership. The basic interaction in the model is interaction between households and businesses. On the left side of the graph dominates the impact of households, in the right part the impact of the behavior of the enterprise and the business environment prevails.

In the description of the model, we can deduce two possible approaches of Internet platform operators (context model) to create support for their delivering. The first approach is to optimize shopping behavior, social efficiency. There are open platforms where information is not hidden for any reason, it is not necessary to share it with other market participants, including state institutions. There are preferred innovation processes, product innovations, as well as helping in a social order to support innovative business activities.

The second approach plays the role as a tool for controlling market activities. From the theory of public interest, there is a significant constraint due to the fact that these platforms produce negative externalities [28]. While, for example, extra charges received in the form of a local tax on accommodation in traditional hotels are received and returned to the municipal budget, which generally subsidizes local public activities and, in this way, it contributes to the increase in attractiveness, interest and quality of accommodation, in case of sharing it will not happen. The sharing of accommodation provided by the private sector cannot be taken into account as a driver of progress because it does not contribute to the attractiveness of the service in these ways. It is necessary to assess the need for regulation and choose what is more appropriate - to support traditional business or activities provided by sharing economy. From a control point of view, the most important grey area is the area to the right of the C curve. This "fuzzy sharing"

area is a grey zone, an area of social interest in regulation. It is a grey economy that is not socially effective.

5.4. AN ANALYSIS OF THE ROLE OF SCIENCE PARK

The support of spin-off companies also provides science parks. Science parks play a very important role when setting up university and non-university spin-off companies. The result of such cooperation [29] creates a basis for suggestions formulating, based on best practices (for example, prepared by experts from Taiwan who have been familiar with the situation regarding the already mentioned Bilateral Agreement, for example the University of Zilina and Broker Center of Air Transport visit), as follows:

- State support, regional and local autonomy is essential when building science parks, which should be built according to the situation in state development.
- It is important to provide infrastructure and management of high quality while building science parks.
- It is necessary to find qualified experts for effective communication, experts who will be able to discuss park's business interests, suggest examples of "best experience" either from the science park environment or abroad.
- This should also be applied to the Broker Center of Air Transport for knowledge and technology transfer with the aim of developing transport and transport infrastructure.
 - Autonomy is very important for a science park (in Taiwan, this autonomy is created by companies that are located directly in a science park).
- Ideal equipment should include: high-quality, fast internet connections, free zones, hot links available 24 hours a day, restaurant, coffee shop, shopping area, relaxation center, etc.
 - It is advised and effective to learn from the experienced ones when it comes to knowledge transfer and a spin-off company set up. Many people are still expected to "learn from the experienced ones". For service or product providers it should be a challenge in order to progress and successfully deal with the problems and obstacles we are experiencing.

5.5. EVALUATION OF THE CONDITIONS OF TECHNOLOGY TRANSFER AND THEIR COMMERCIALIZATION

Next, we also evaluate the possibilities of technology transfer and their commercialization, implemented through spin-off or start-up companies on the basis of evaluation of experiences from examples of best practices. To assess the current situation in the attitude of SMEs to implement or innovate IT as a basic support of their IS management we evaluated the opinions of 189 SMEs managers and of 29 representatives of IT companies (data collection realized by electronic survey and by structured interviews) and data analysis was provided using validation of hypotheses, where we used the statistical methods and validation tools as a part of the SPSS program).

Although many surveys are mostly oriented towards developed and innovative regions, our research activities have been oriented to spin-off companies in economically less developed regions or those with lower innovation activities. While such regions are mostly characterized by the absence of excellent research, the influence of spin-off companies is not only symbolic, but instead helps to improve the flow of knowledge within the region. Nevertheless, the number of university-related spin-offs is relatively low, but its interconnection with universities demonstrate that universities can be considered as catalyst for the business sector within the

region. Many spin-offs are oriented towards providing consulting services, which in turn could help develop specialized expert services or groups offering knowledge intensive services within the region. It also supports networks creation with other companies and expanding of personal contacts between specialists and practitioners. Newly established spin-offs could help develop a second generation of technologically advanced spin-offs in the future.

The worse situation is in the area of other small and medium-sized enterprises (SMEs), which play a significant role in the sharing economy, especially in less developed regions. According to our previous research (realized in 2015 with managers of SMEs), only a small part of SME was interested in the new technologies. We tried to find the key barriers, which prevent companies to utilize the potential of new technologies and innovations. In [30] dealt with a similar issue and they stated that managers of SMEs (representatives of 50 small and medium-sized enterprises located in Lower Silesia) declare lack of financial resources and infrastructure for the comprehensive implementation of integrated information systems to facilitate interpersonal communication in plants. They use only traditional tools, their level of skills is low and their awareness of staff production facilities in the field of information security, especially when working on the computer and using traditional media is low, too.

We analyzed respondents' answers to the question if companies have enough information about technologies and innovations. The result is that in two of the above-mentioned companies, companies see the low level of satisfaction with the rate of their awareness. Using the Wilcoxon Signed Ranks non-parametric test we considered a mutual relationship between awareness of new technologies and innovations. As we found, $\alpha = 0.127 > 0.05$, therefore, we want to state that they feel better informed about technologies than about innovations. Then we reviewed the frequency of seeking information about technologies and innovations. We considered the answers to the question "How often do you search for information about technologies or innovations?" We tried to find out if they often seek information daily, weekly or monthly or prefer to seek information once a year, once a year or never. By Wilcoxon Signed Ranks We tested the frequency of seeking information. We calculated, that $\alpha = 0.827 > 0.05$. We found out that they are mostly seeking information about innovation or technologies (app. monthly, 29% or half yearly, 20.5%). That's why we can state that if companies are interested in new technologies and innovations, they will be more interested in new information about them.

We have also examined the barriers that restrict the widespread use of IT, system integration of IS and tools supporting business process automation based on arguments of respondents - company managers and representatives of IT companies. We can state, most of SMEs (93.7%) use basic software support for business doing. This creates conditions that increase the importance of implementing electronic business models also in the small and medium sector as a basic tool for data processing, information search and for their distribution and sharing. This is important when they want to provide their services effectively in strong competition.

Before implementing software for business support, it is necessary to acquire adequate information about the company. We classify this information in the following order: finding functionality to use software support, the level of integration with other tools, identifying areas of corporate activities and the price they are willing to invest in ICT support, technical requirements, existing IT support and other requirements included - bottlenecks in business processes, knowledge of work practices, current processes and planned changes, as well as application to be integrated. If companies have this information, they also create the conditions for the transfer and dissemination of knowledge across the enterprise. In the sharing economy it is more important, as SMEs are the initiators of changes. It is due to the ability to look for

suitable solutions at low cost to the innovation and implementation of electronic ways of connectivity and communication.

CONCLUSION

The digital economy creates new opportunities but also new challenges for sharing economy. Companies have developed on-line platforms (such as Uber and Deliveroo) that other people can use to fill their needs sharing some products or services. These products are then shared between these companies as well as providers. These companies gain an advantage over traditional companies as they benefit from providing their own equipment or service. This reduces costs for them and creates opportunities for providing some "on-demand" services. Their own interest is their technical support and online accessibility.

Evaluating the research findings allows us to define the procedures and conditions that lead to full professional support of sharing. Regarding the newest developed technologies are often not fully functional and related problems with their co-operability need to be solved in practice. Licensed technology addresses these issues and is also a guarantee of their functionality. However, it is well known that companies are not willing to pay for such licenses.

The spin-off companies are the best way to realize the complex development of a functional product that can be later evaluated on the market and offered to a wide range of business partners. The license provides the contractual relationship between the university and the spin-off company, which enables them to further develop and thus contribute to the maintenance and development of the local or regional innovation ecosystem. Managers get the opportunity to understand how to set up and develop an innovative business and what kind of relationships between the university and the spin-off company (especially in the legal and financial field) can arise in transferring knowledge from the university environment into practice. It builds and also strengthens the mutual non-financial relationships between the university and the spin-off, where the effect of applying science to business marketing, improving the quality and scope of practical education is done.

According to the OECD Recommendation [31], we can state that a sharing economy is a reality, it makes no sense to distinguish between classical and online activities, but it is necessary to focus on predicting and preparing for digitization, looking for ways to take advantages of digital economy, boosting trust across sectors in a network, complex and global ecosystem. Furthermore, it is necessary to move forward in the digital agenda, in four key policies, as to be opened towards the Internet and innovation, confidence in the digital economy, the construction of a global interconnection and, create jobs and skills.

Some areas of the sharing economy can impact that they can be positively rated from a certain point of view, from another negative one. It is given by the following aspects:

- due to offer lower transaction costs and a desire to reach out to the young generation in particular, the prices fall in comparison with payments for traditionally provided services; it can be positively rated by consumers but it evokes a deflationary impact,
- platform operators require a lower level of regulation of selected activities, especially services, which may be positively perceived by the service provider but it creates a negative impact on consumer protection, or fiscal interests.

The importance and the need to dispose with regulatory tools and regulatory measures is growing. In this way the using of the Conceptual Sharing Economy Model – CSEM advantages

plays its role. Managers get a tool for evaluating their own business, where the use of IT offers sophisticated ways of decision-making. They can better decide which regulatory measures or innovations are to be preferred. The result is the ability to get up-to-date information that actually informs about the current business situation.

As a result of our research activities we recommend the managers to realize:

1. Population research aimed at the supply and demand for a sharing economy by sectors, including an estimate of the size of individual markets.
2. Analysis of trends in individual sectors of the sharing economy (e.g. Airbnb), which would provide an estimation of the size of these segments on an annual basis, which will provide an overview of on-going service offerings, including occupancy analysis.
3. Market Sensitivity Analysis, including spatial elasticity - based on data obtained from regions, enables partial analyses as a basis for assessing the impacts of the sharing economy on specific entities, including the worsening of their economic results. The statistical evaluation of the practical experience allows for better conditions for the commercialization of technology and also for identifying and making recommendations for the regulatory treatment of the sharing economy.

Sharing economy is not only an alternative distribution and user model, but also a competitive alternative to entities offering distribution and use of products, services, time, skills or competencies. It is due to the fact that some on-line applications allow feedback and flexible evaluation of the quality of the product or service provided. Based on this information, they may affect the quality of the provider or exclude poor quality products or services providers from the offer. Even this element of self-regulation could be used to support the limitation of regulatory measures.

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THE ROLE OF CONSULTING SERVICES IN THE ECONOMIC DEVELOPMENT OF SMALL AND MEDIUM-SIZED COMPANIES

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Abstract: *The development of information and communication technologies that have linked the whole world together; have led to a global change of all aspects of life, of people's way of life and not just of material production. The correlation and the contrast between work and leisure have changed the types of economic activity also. The speed of all economic processes has increased, owing to the unprecedented increase in the speed of information transfer and the technological development of production, management and exchange processes. There is an opportunity to introduce instantly organizational changes based on technical novelties (implementation of project management systems, workplace training, etc.). In these circumstances, the economic entity faces a growing competition, making faster decisions and introduce organizational changes. As a result, there is a need for specialists to help make changes. This raises intellectual entrepreneurship through specialized advice.*

As a result, consultancy becomes a benchmark in the development of companies' competitiveness and sustainability in the market. For the success of its business, the enterprise must react to the emergence of "weak signals" in the external environment.

For this purpose, it is necessary, first, to monitor the evolution of events in the external environment in order to identify these weak signals. However, a small business cannot hold such observer - specialists within the company. However, some and the same information on outside events has different meanings for different companies, they can be positive for some and negative for others. The role of consultants is to monitor changes in the external environment and solve problems related to a particular firm, assessing the role and importance of market signals for this.

Although the use of consultancy as a resource for growth and adaptation of new market demands is spread among corporations due to high costs, it plays an important role in the economic development of small and medium-sized enterprises. They do not have the ability to monitor all the changes that appear, just as large companies can have marketing or strategic analysis staff. To have specialists in various fields such as strategic management, staff management, marketing, and more so for narrower areas such as information technology, financial analysis, etc., in a small business is expensive. Thus, the use of advisory services on certain issues could provide timely vital information for the company by enhancing its information system.

The work analyzes the impact of using consultancy services in small and medium-sized businesses on their economic development and sustainability.

Keywords: *consultancy services, development, small and medium-sized enterprises*

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1. EVOLUTION OF CONSULTING ACTIVITY

Separation of consulting as an independent type of economic activity is related to the transition to a post-industrial economy. Consulting appears as a result of the development of the social division of labor. This product becomes a type of an independent activity in the post-industrial society, in connection with the formation of the "new economy" or the "knowledge economy". The material basis of this process is to transform knowledge into an independent economic resource and a key property object. This emerges from the continuous search for new ways of increasing the efficiency of production by entrepreneurs. Experienced management's attempts to find a commercial application for their skills that determine the desire to transfer the accumulated experience, to attach it to the development of appropriate recommendations. One of the first professional consultants in this field was the founder of the company's scientific management theory, F. Taylor. The first management consultancy - Business Research Services was established in Chicago in 1914. In the 1920s and 1940s, such firms spread across Europe, and in the following decades in other regions of the world - in Asia, Africa, Latin America.

At the early stage, management consulting was identified as a type of business consultancy, accelerating scientific and technological progress, internationalization of industry, trade and finance. Currently, consultancy companies are becoming more popular, with consulting types and sub-sectors being developed. This becomes one of the most important spheres of intellectual entrepreneurship. Effective consultation is a transforming element in the new economy, because its essence is the application of a consultant's knowledge in a specific situation, a particular firm, or a process and aimed at changing this situation [1].

2. THE CHARACTERISTICS OF THE CONSULTING ACTIVITY

The consultancy can be defined as "a certain type of common intellectual activity of the consultant and the client, in the process of delivering the services to optimize the ways of achieving the client's interests in the areas set by the objectives, the efforts to achieve the objectives as well as the monitoring quality and efficiency of these activities. "

The following signs of the consultancy activity are noted: professional assistance, consultative character, independence, analysis, rationalization and optimization, joint activity, primarily intellectual, of consultant and client.

1. Professional assistance means that any advice should be performed by specialists with professional experience and highly qualified in this area. Theoretical knowledge must necessarily be supported by practical experience in analyzing different managerial situations. In particular, A.P. Posad and S.V. Haynish defines consulting as the "professional assistance of company management specialists, management and administrative staff of various organizations in resolving their operational and development issues, in the form of advice, recommendations and solutions developed with the customer."

2. The advisory nature assumes that a consultant is responsible for the quality and validity of the advice he provides, and the client is responsible for implementing the decision taken based on the advice.

3. Independence of consultancy. Counseling is "highly qualified help for managers, aimed at improving the work of organizations by independent (outside the organization) experts specializing in a particular field." [2] The independence of the consulting service implies: financial independence (the objectivity of the recommendations should not be affected by the consultant's willingness to continue with the client); administrative independence (the consultant is not subordinated to the client and all administrative decisions do not apply to him / her); political independence (the consultant should not be influenced by people who use political ties, membership in a political party, etc.); emotional independence (the consultant keeps the distance during the realization of the task).

Independence offers consultants a number of advantages over managers [3]:

Specialization offers the possibility of better information. - The consultant has an impartial view from the outside. Managers at any level can be influenced by personal ties, traditions and values that have developed within the enterprise, which prevents clear view of the problem and effective decision-making.

The consultant instructs the client in the counseling process. Many organizations are addressing not only to find solutions to a particular problem, but also to acquire the knowledge and experience of a consultant.

The consultant can justify the decision taken by the management, confirm his authority, confirm his decisions, using his / her personal experience.

The consultant provides temporary assistance, practically extending the staff of the organization.

Some types of independently developed activities can cost the company much more than the services of specialized firms (marketing research, development and implementation of advertising companies).

4. Rational character. O.K. Elmashev considers consultation as an effective form of rationalization of production management based on the use of science and best practices.

5. Ensuring the client with additional resources. This aspect is present in the definition of V.I. Aleshnikov, which introduces the term business consultancy, defining "securing the client with experience, methodology, behavior techniques, professional skills or other resources that help him to optimize the financial and economic situation of the enterprise within the current regulatory framework". This definition is very important to us because, unlike others, it indicates not only an auxiliary, "helpful" or consultation analysis function. Here the role of the consultant is highlighted as an additional resource bearer, which the client receives as a result of the application of the consultancy.

As additional resources the client receives from consulting, there are: experience, behavioral technique, professional skills. However, in our opinion, this does not explain the spread of advice, which differs from consultations by narrow field specialists - medical or pedagogical consultations. In our opinion, in the consultancy activity, there is an increase of the intellectual capital of the organization in the common activity of the client and the consultant.

Currently, consultation is an institution with increasing importance for market economy. Therefore, it can be represented as follows:

- as an institution in which the current level of habits and standards of consulting perception are concentrated;
- as a business sector, a separate type of entrepreneurship on the market;

- as a professional sphere with its own standards, criteria and qualification levels;
- as a scientific-applicative field of activity, with its methodology and approaches;
- the type of occupation or specialized activity that requires certain skills, abilities and qualities of the individual.

In modern market conditions, the economic environment is continuously changing under the influence of evolution of information and information technologies. For economic agents whose main task is the production of goods and services, searching for information is one of the important functions. In these circumstances consulting position itself as a specialist in identifying customers problems, finding and providing a result of impact for exact solving his problem. The result of the consultancy is to increase the competitiveness of economic agents as a result of the introduction of efficient economic and managerial approaches and the professional development of managers and specialists from companies. On the services market, consulting is one of the types of business services. It represents different types of infrastructure activities, namely activities that provide conditions for the functioning of the material and non-material spheres of the national economy. These services ensure the formation and interaction of all elements of the infrastructure complex. Consulting service can refer to both the secondary activities of the economic agents and the main activity [4].

The range of issues that lead to the need for consultancy is diverse, such as business crises, organizational and management restructuring, strengthening a competitive market position, or preventing or counteracting opportunistic behavior of employees and managers. The opportunistic behavior of employees or management staff can lead to loss or even the risk of loss of ownership. Cases of critical situation that occur when the owner or management cannot solve themselves because of lack of experience or internal resources are the reasons to use the services of a consultant.

Reasons for consulting business management in E. Beych's vision are as follows:

- The need for expertise.
- Lack of time.
- Lack of experience.
- Objective opinion from outside.
- New ideas.
- Speed and efficiency.
- Assessment of the situation.
- Independence. [5].

Consultancy can provide the skills and knowledge needed to ensure economic growth or to cope with any major changes in company activities in limited time. It is able to provide qualified services, through fresh knowledge and impartial vision of how to solve problems, with the involvement of new knowledge and successful solution models.

3. THE IMPACT OF CONSULTANCY ON THE DEVELOPMENT OF THE SME SECTOR

For large businesses, issues such as: M & A, enterprise restructuring, ICT issues, and many other issues that are not included in day-to-day business activities are typically resolved with consultancy firms. For small and medium-sized businesses, the practice of recruiting external consultants is not yet widely spread.

Analyzing consulting as an institution for the development of small and medium-sized enterprises, especially small businesses, it is necessary to understand the tasks they are doing in a company. The first task is to create a middle class, that is, a class of self-confident people who see the prospect of their own development in their own country. This advisory task should increase the confidence of entrepreneurs in their decisions, in the prestige of entrepreneurship itself.

The second task solves problems related to job creation as well as training and survival in the competition. This is a social task, and in this case, consultations should benefit from additional resources, learn to identify and transform various factors into business resources.

The third task is to use the potential of small businesses as an economic tool to stimulate initiative, entrepreneurship and innovation. In the innovative economy that Drucker described, the leading role in the economy is played by millions of small and medium-sized businesses [6]. We are talking not only about the production of high technology products through the use of high technology, but also about innovations related to marketing, logistics, interaction and other aspects of ensuring the competitiveness of goods and services in terms of price and quality.

The importance of small and medium-sized businesses in the economy has been confirmed by world practice. The state and role of small and medium enterprises in the country's economy is characterized by the following indicators:

- the number of small enterprises and individual entrepreneurs in the total number of market economy subjects;
- the contribution of small and medium-sized enterprises to the creation of a gross domestic product, to the production of goods (works, services);
- the contribution of small and medium-sized enterprises to the formation of federal and regional budgets;
- the dynamics of the number of working-age population employed in small and medium-sized enterprises, the contribution to reducing the number of unemployed;
- saturation of the market with consumer goods (works, services), the best satisfaction of the needs of the population;
- the skills of citizens able to create their own business, the accumulation of experience in business management, etc.

In fact, consulting service is more relevant to SMEs, even more than for large business enterprises. This can be justified by using the approaches of the institutional economy and the concept of cognitive capitalism, as follows:

1. The consulting intensifies the dependence of the company's internal environment on the sudden change of external factors. If a small or medium enterprise does not capture environmental signals in time and does not take appropriate adaptation measures, it will die. Entrepreneurial responses to changes in the external environment should be a response to obvious and specific events, the importance of which should be evaluated in a timely manner. However, often, making decisions based only on obvious information can be dangerous: the enterprise has big losses due to the fact that time has been lost and the change comes late.

For the success of its business, the enterprise must react to the emergence of "weak signals" in the external environment. For this purpose, it is necessary, first of all, to monitor the evolution of events in the external environment in order to identify these weak signals. However, a small

business cannot hold such observer - specialists within the company. But some and the same information on outside events have different meanings for different companies, they can be positive for some and negative for others. The role of consultants is to monitor changes in the external environment and to solve business-related problems by assessing the role and importance of market signals for this. As Alliance-Media specialists write: "Obviously, the stronger the signal, the less time the company has to respond to. In order to ensure that a small company's response to signal strength is consistent, management consultancy can, with the enterprise-client, implement an alternative response strategy: for a weak signal, an awareness strategy; for average signal power - a flexibility strategy; for a high signal strength - an immediate reaction strategy. "

SME specialists do not have the capacity and often the ability to monitor all the changes that are occurring, just as large companies can do with marketing or strategic analysis. To have specialists in various areas such as strategic management, staff management, marketing, and even more so for narrower areas such as information technology, financial analysis, etc., in a small business is expensive. It is better to check the course regularly, in consultation with professionals.

2. Consultancy develops the objective process of specialization, as well as an increase in interconnection and interdependence in the economic system; networks of interconnected enterprises, including SMEs, are being developed; in networks, there are specialized representatives of the IT infrastructure, representing different consulting and training structures, their services become more branched and accessible both spatially, especially through the development of various software and at the price.

3. Consultancy helps create competitive advantages for assisted firms. This is important for firms of different sizes, but it is particularly important for SMEs, as large businesses have the opportunity to rely on strategies associated with ensuring a market monopoly and the benefits of mass production. Competitiveness in SMEs can be achieved through the ability to adapt to a niche, the uniqueness of goods and services, speed, building partnerships with other firms, and customer orientation. All these advantages are based on the introduction of innovations related to the most diverse aspects of the company's activities - marketing, design, personnel management, customer base, social networking, Internet promotion etc. These innovations are based on the use of the latest knowledge and technologies. The main problem is to have this modern knowledge.

Within the institutional approach, knowledge is seen as a commodity that can be bought and sold. At the same time, the company can create it alone. According to transaction cost theory, the firm prefers to create knowledge in itself if the value of knowledge created inside is less than the market price of this knowledge, plus transaction costs for acquiring it. The very existence of the company, according to Demsetz, is associated with the fact that the company minimizes the expenses for communication and coordination of knowledge [7]. Knowledge market transactions are often complex, expensive or impossible because of the specific nature of knowledge. Creating knowledge is initially an activity of high uncertainty: which one will bring success is an unknown one. Knowledge is therefore difficult to buy from the market. In addition, knowledge is difficult to acquire on the market because of the high percentage of "implicit" knowledge. It is difficult to determine the presence of implicit knowledge and to transfer it without moving the key personnel, so the more implicit knowledge in the know-how of a company, the more likely it is to increase its competitiveness with other firms. Consequently, large firms, where knowledge processes are of major importance, prefer to have

their own specialists, their laboratories, to solve their problems, including those problems solved by consultants. Thus, acquiring this knowledge within the firm for large firms will be less expensive than buying them on the market.

For small and medium businesses, on the contrary, transaction costs to create their own knowledge are greater because there is no effect of economies of scale on production, mastery and dissemination of knowledge, and knowledge acquisition transactions are more appropriate.

Using new knowledge from the consultant leads to business transformation and the introduction of new management technologies, the use of which can lead to significant results for SMEs, including increased competitiveness. The question of applying the advice in this case is finding a competent consultant, which should be assured first by developing the consulting institute in general and the mechanisms that ensure the quality of the consultancy.

4. The consultancy promotes the efficient use of the company's intellectual capital. Developing globalization and knowledge sharing leads to an avalanche of information, new knowledge, and therefore new business practices and models. All this requires the use of a wide range of versatile professional knowledge and reliable information in the business. If in large companies this can be done through the systematic management of knowledge, as it is today in large companies and corporations, it is almost impossible for SMEs. Consequently, the SME business consulting system becomes an indispensable component of market economy infrastructure that contributes to their survival and competitiveness.

5. Increasing the innovation of small and medium-sized enterprises. The emergence of the Internet has made it possible to extend the possibilities of obtaining professional advice as well as access to information. There exist and are used the opportunities of copyright infringement and the illegal use of new knowledge. As a result, small firms that can generate innovations and use new knowledge can compete on an equal footing with large corporations.

6. Expanding knowledge about forms of support for small businesses. It is also important that at present there are different programs and funds to support small businesses; many small businesses do not even know or take advantage of these opportunities. Consultancy can help you take advantage of these opportunities.

Thus, modern consulting helps SMEs not only survive, but also increase their competitiveness to develop in a complex and modern external environment.

CONCLUSIONS

The current system of economic relations does not respect the principles of efficiency, and the entrepreneurial self-regulation type does not develop the existing potential.

Therefore, the problem of organizing entrepreneurial activity cannot be determined without taking into account the concrete forms of product scrolling across the entire production chain - from primary forms (manufacture of the product) to subsequent distribution between separate structures.

Such a mechanism is a complex form, which does not have a unilateral correlation with the market regulation and the economic relations systems, and even less with the technical targeting of some companies.

The principles of organizing economic relations do not change, regardless of whether the entrepreneurial system is considered as a whole or in structural sectors. In the general theory of systems, it is established that the properties of some parts of a system are embedded with the properties of the system as a whole.

It should be mentioned that the prerequisites for increasing the efficiency of the entrepreneurial activity include respecting the principle of functional prediction and rational organization - obtaining the maximum results with minimal efforts. Under these circumstances, the consultancy services, especially on the informational aspect, represent the necessary support for the development and maintenance of the market competitiveness of the economic agents.

Thus, the role of consulting in maintaining and developing companies' competitiveness is substantial.

Increased use of consulting services also leads to changes in the structure and behavior of companies on the market, closely linking the business and consulting activity. In this way, by increasing the performance of economic agents, the scope of consulting services is expanding.

Consultancy services are generally in growth. And although advice is widespread among large companies, small and medium-sized businesses are at an early stage of development. This division is due to the different importance of consulting for large companies on the one hand and small and medium on the other.

Enhancing the effectiveness of SME consultation is based on the study of particular SME issues and the creation of specialized products for this consultancy sector.

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KARAKTERISTIKE I PERSPEKTIVE RAZVOJA MALIH I SREDNJIH PREDUZEĆA U REPUBLICI SRBIJI

CHARACTERISTICS AND PERSPECTIVES OF THE DEVELOPMENT OF SMALL AND MEDIUM-SIZED ENTERPRISES IN THE REPUBLIC OF SERBIA

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Apstrakt: Razvoj malih i srednjih preduzeća, koja čine preko 99% privrednih subjekata u Republici Srbiji, od izuzetne je važnosti za razvoj privrede, povećanje zaposlenosti, poboljšanje životnog standarda stanovništva, za ravnomerniji regionalni razvoj, kao i povećanje šansi za priključenje Evropskoj uniji. Cilj rada je da sagleda karakteristike dosadašnjeg razvoja i da ukaže na perspektive budućeg razvoja malih i srednjih preduzeća u Republici Srbiji, koja bi mogla da budu konkurentna na tržištu Evropske unije i da doprinesu daljem rastu životnog standarda stanovništva naše zemlje.

Ključne reči: mala i srednja preduzeća, Republika Srbija, karakteristike razvoja, perspektive razvoja.

Abstract: The development of small and medium-sized enterprises, which make up over 99% of business entities in the Republic of Serbia, is of great importance for the development of the economy, increasing employment, improving the living standard of the population, for more balanced regional development, as well as increasing the opportunities for joining the European Union. The aim of the paper is to examine the characteristics of the current development and to point out the perspectives of the future development of small and medium-sized enterprises in the Republic of Serbia, which could be competitive on the European Union market and contribute to the further growth of the living standards of the population of our country.

Keywords: small and medium enterprises, Republic of Serbia, development characteristics, development perspectives.

1. UVOD

Sektor malih i srednjih preduzeća je u poslednjoj deceniji XX veka, zahvaljujući značajnom povećanju ekonomske aktivnosti, zauzeo značajno mesto u razvoju mnogih zemalja, posebno zemalja u razvoju. Upravo u tim zemljama stvaranje povoljnog poslovnog okruženja i institucionalnog okvira, kao i obezbeđenje finansijskih sredstava predstavlja izazov sa kojim se suočavaju kreatori ekonomske politike, koji su prepoznali značaj i ulogu malih i srednjih preduzeća.

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Republika Srbija ima za cilj da *mala i srednja preduzeća*, tokom vremena, postanu izvozno orijentisan i međunarodno konkurentan sektor. Ukoliko dođe do ostvarenja ovog cilja, Srbija će imati višestruke koristi i to: viši životni standard stanovništva, ravnomerniji regionalni razvoj, veći stepen zaposlenosti i velike šanse za priključenje Evropskoj uniji (EU).

U Republici Srbiji osnovana je prva mreža poslovnih anđela *Serbian Business Angels Network (SBAN)*, koja tek treba da se razvije i započne sa ulaganjima, kao i *Srpska asocijacija privatnih ulagača u kapital preduzeća (SPEA)*.

Institucionalnu infrastrukturu za podršku razvoja malih i srednjih preduzeća i preduzetništva u Republici Srbiji čini mreža javnih institucija i agencija - Nacionalna agencija za regionalni razvoj, Fond za razvoj, Agencija za strana ulaganja i promociju izvoza i Nacionalna služba za zapošljavanje. U Republici Srbiji aktivna je i Evropska preduzetnička mreža, koja deluje u okviru konzorcijuma predvođenog nacionalnom agencijom za regionalni razvoj. S tim u vezi, mala i srednja preduzeća u Srbiji imaju mogućnost da, kao i preduzeća u Evropskoj uniji, dobiju potrebne informacije i usluge, koje su im od izuzetnog značaja za uspešno poslovanje na tržištu Evropske unije, za transfer tehnike i tehnologije, za pronalaženje poslovnih partnera, za inovacije i učešće u programima Evropske unije.

2. KARAKTERISTIKE RAZVOJA MALIH I SREDNJIH PREDUZEĆA U REPUBLICI SRBIJI

Mala i srednja preduzeća (MSP) predstavljaju okosnicu razvoja privrede, kako razvijenih zemalja, tako i zemalja u razvoju, kao što je Republika Srbija. Da bi opstala na tržištu, ova preduzeća moraju stalno graditi nove konkurentske prednosti. Naime, kako bi mala i srednja preduzeća podigla nivo svoje konkurentnosti na jedan viši nivo, potrebno je da sarađuju i sa drugim malim i srednjim preduzećima, da prate potrebe i zahteve potrošača i da koriste savremenu tehnologiju u cilju proizvodnje visokokvalitetnih proizvoda, koji se javljaju kao sve veća potreba potrošača.

Zahvaljujući svojoj fleksibilnosti, vitalnosti, sklonosti ka preduzimanju inovativnih i rizičnih poduhvata i većoj mogućnosti za specijalizaciju, mala i srednja preduzeća se superiornije od velikih poslovnih sistema prilagođavaju zahtevima potrošača i dinamičnim promenama u uslovima poslovanja na globalnom tržištu [1]. Mala i srednja preduzeća treba posebnu pažnju da obrate na promene koje se dešavaju na tržištu, to jest u okruženju. Da bi opstala i napredovala, mala i srednja preduzeća stalno moraju da se prilagođavaju promenama i da maksimalno iskoriste sve prednosti koje tržište pruža, i da svedu na najmanju moguću meru ograničenja koja proizilaze iz tih promena.

Vlada Republike Srbije je u martu 2015. godine usvojila *Strategiju za podršku razvoja malih i srednjih preduzeća, preduzetništva i konkurentnosti za period od 2015. do 2020. godine*, kojom se utvrđuje okvir, najvažniji ciljevi, prioriteti i mere za unapređenje razvoja malih i srednjih preduzeća i preduzetništva u narednom periodu. Strategija je usklađena sa politikom Evropske unije u oblasti malih i srednjih preduzeća, koja je definisana Aktom o malim preduzećima Evropske unije.

Osnovni zadaci razvoja MSP u Republici Srbiji, zacrtani Strategijom za podršku MSP, preduzetništva i konkurentnosti za period od 2015. do 2020. godine [2], su: osnovati veći broj MSP; povećati procenat MSP koja opstaju tokom početnih godina poslovanja; povećati obim sredstava za finansiranje MSP pod povoljnijim uslovima; povećati konkurentnost MSP;

podsticati razvoj inovativnosti u MSP; povećati učešće onih MSP koja rastu zahvaljujući izvozu; podstaći prerastanje mikro u mala, i malih u srednja preduzeća.

Sektor MSP i preduzetnika predstavljaju sve značajniji segment srpske privrede. Već nekoliko godina unazad ovi privredni subjekti su najefikasniji deo privrede Republike Srbije i predstavljaju nosioce privrednog rasta i zapošljavanja. Uz strane direktne investicije, ovaj sektor bi u budućem periodu mogao biti izuzetno značajna poluga ekonomskog razvoja, kao i osnovni kreator novih radnih mesta [3]. Kao izuzetno značajan segment privrede Republike Srbije sektor MSP čini 99% ukupno aktivnih preduzeća, zapošljava skoro 2/3 zaposlenih u nefinansijskom sektoru i učestvuje sa 35% u BDV Srbije [4].

U 2016. godini u okviru preduzetničkog sektora poslovalo je 340.112 preduzeća, koja su generisala 1.222,5 mlrd. Dinara novoostvarene vrednosti i zapošljavala 837.532 ljudi. Naime, sektor MSP činio je 65,7% zaposlenosti, 56,2% bruto dodate vrednosti, 65,1% prometa, 50,5% profita i 40,8% izvoza nefinansijskog sektora. Procenjuje se da je u 2016. godini sektor MSP učestvovao sa 34,8% u bruto dodatoj vrednosti privrede Srbije [4].

Tabela br. 1 – Indikatori razvijenosti MSP

| | MSP | | Velika | | Ukupno | | Učešće MSP % | |
|---------------------------------|-----------|-----------|-----------|-----------|-----------|------------|--------------|------|
| | 2015 | 2016 | 2015 | 2016 | 2015 | 2016 | 2015 | 2016 |
| <i>Broj preduzeća</i> | 324.600 | 340.112 | 494 | 501 | 325.094 | 340.613 | 99,8 | 99,9 |
| <i>Broj zaposlenih</i> | 801.719 | 837.532 | 418.538 | 437.910 | 1.220.257 | 1.275.442 | 65,7 | 65,7 |
| <i>Promet (mil. Din.)</i> | 6.302.870 | 6.609.879 | 3.197.616 | 3.539.947 | 9.500.486 | 10.149.826 | 66,3 | 65,1 |
| <i>BDV (mil. Din.)</i> | 1.096.750 | 1.222.519 | 805.147 | 953.383 | 1.901.897 | 2.175.902 | 57,7 | 56,2 |
| <i>Izvoz (mil. Din.)</i> | 635.312 | 669.259 | 804.486 | 969.179 | 1.439.798 | 1.638.438 | 44,1 | 40,8 |
| <i>Uvoz (mil. Din.)</i> | 1.087.080 | 1.180.263 | 835.919 | 914.431 | 1.922.999 | 2.094.694 | 56,5 | 56,3 |
| <i>Robni bilans (mil. Din.)</i> | -451.768 | -511.005 | -31.433 | 54.749 | -483.201 | -456.256 | 93,5 | - |
| <i>Investicije (mil. Din.)</i> | 300.621,8 | - | 244.081,5 | - | 544.703,3 | - | 55,2 | - |

(Izvor: Ministarstvo privrede na osnovu podataka RZS)

U tabeli vidimo da je u 2016. godini u odnosu na prethodnu godinu ostvaren realni rast kod većine posmatranih pokazatelja poslovanja. Posmatrano po veličini zabeležen je porast broja preduzeća (4,8%) i broja zaposlenih (4,5%). Nastavljen je, takođe, trend rasta BDV-a i prometa sektora MSP. U 2016. godini BDV je bio realno veći za 10,1%, a promet za 3,6%. Izvoz je, takođe, porastao za 4,1%, ali je zbog značajnog većeg rasta izvoza velikih preduzeća (19%) učešće u izvozu nefinansijskog sektora smanjeno (sa 44,1% na 40,8%). Učešće uvoza sektora MSP u uvozu nefinansijskog sektora je ostalo na nepromenjenom nivou (56,3%). Na osnovu podataka iz tabele, takođe, vidimo da je rast uvoza po višoj stopi od rasta izvoza uticao na povećanje deficita sektora MSP (11,8%), koji je iznosio -511 mlrd. dinara.

Prema godišnjem Izveštaju Svetske banke o uslovima poslovanja za 2018. godinu (Doing business 2018), Srbija je 2016/2017. godine zauzela 43. poziciju na listi od 190 zemalja, i ova pozicija je bolja za 4 mesta u odnosu na Izveštaj prethodne godine, odnosno napredovala je za 16 mesta u odnosu na 2014/2015. godinu (59 pozicija prema Izveštaju za 2016. godinu). Na osnovu Izveštaja vidimo da je došlo do značajnog napretka u razvoju sektora MSP i kada uporedimo postignute rezultate Republike Srbije sa zemljama u okruženju, Srbija je sa 43.

mestom bolja od: BiH (86. mesto), Albanije (65. mesto), Hrvatske (51. mesto), Mađarske (48. mesto), i Rumunije (45. mesto). Najbolje rezultate poslovanja imaju sledeće države regiona: Makedonija (11. mesto), Slovenija (37. mesto) i Crna Gora (42. mesto). Iako je došlo do značajnog napretka u razvoju sektora MSP u Republici Srbiji, ipak je on manje razvijen u odnosu na prosek EU-28 i većinu zemalja EU iz okruženja.

3. MERE ZA UNAPREĐENJE I POVEĆANJE KONKURENTNOSTI SEKTORA MSP

Strategijom se utvrđuju mere za unapređenje MSP i konkurentnosti u narednom srednjoročnom periodu, koji je prikazan kroz šest najznačajnijih stubova i to [5]: (1) unapređenje poslovnog okruženja; (2) unapređenje pristupa izvorima finansiranja; (3) kontinuirani razvoj ljudskih resursa; (4) jačanje održivosti i konkurentnosti MSP; (5) unapređenje pristupa novim tržištima i (6) razvoj i promocija preduzetničkog duha i podsticanje preduzetništva žena, mladih i socijalnog preduzetništva.

(1) U Republici Srbiji u proteklih deset godina sprovedene su značajne regulatorne promene, koje su imale za cilj stvaranje povoljnog poslovnog okruženja. Evidentno je, da je učinjen važan napredak u oblasti regulatorne reforme u poslednje dve godine, ali, isto tako, neophodno je nastaviti rad svih regulatornih tela i drugih institucija radi otklanjanja raznih prepreka i smanjenja troškova koje pozitivni propisi stvaraju privredi. U okviru mera za unapređenje poslovnog okruženja, u 2014. godini doneti su sledeći zakoni: Zakon o izmenama i dopunama Zakona o stečaju („Službeni glasnik RS”, broj 83/14), Zakon o izmenama i dopunama Zakona o radu („Službeni glasnik RS”, broj 75/14), Zakon o privatizaciji („Službeni glasnik RS”, broj 83/14) i Zakon o izmenama i dopunama Zakona o planiranju i izgradnji („Službeni glasnik RS”, br. 132/14 i 145/14), koji su u značajnoj meri doprineli značajnom poboljšanju poslovanja. Pored navedenih zakona, javljaju se i druge mere za unapređenje poslovnog okruženja i to: unapređenje pravnog okvira za osnivanje i poslovanje privrednih subjekata; unapređenje regulatornog okvira inspekcijanskog nadzora; smanjenje poreskih obaveza privredi; unapređenje zakonskih propisa u oblasti radnih odnosa; regulatorna reforma sektorskih propisa, koji su značajni za poslovanje MSP.

(2) Karakteristično za finansijsko tržište za sektor MSP u Republici Srbiji je manjak mogućnosti zaduživanja radi započinjanja, kao i proširenja poslovanja. Naime, čini ga nepovoljna kreditna ponuda bankarskog sektora uz relativno visoke kamatne stope, visoki zahtevi za kolateralom i nedostatak dugoročnih kredita. U najnepovoljnijem položaju su, svakako, novoosnovana preduzeća, imajući u vidu, da banke preuzimaju najveći rizik kod njihovog finansiranja. Fond za razvoj je jedina institucija u Republici Srbiji koja finansira početnike u poslovanju kroz kreditnu liniju za novoosnovana privredna društva i preduzetnike. U okviru Programa EU za konkurentnost preduzeća i malih i srednjih preduzeća (COSME) i Programa Horizont 2020 (Horizon 2020), postoje posebni finansijski instrumenti u oblasti kreditnih garancija i ulaganja na bazi kapitala, koje mogu da koriste i finansijske institucije iz Republike Srbije, kako bi svojim korisnicima ponudile bolje i povoljnije uslove finansiranja. Mere koje bi se ovde izdvojile za unapređenje pristupa izvorima finansiranja su: razvoj novih modela finansiranja MSP; poboljšanje praćenja stanja finansiranja MSP; unapređenje sistema za izdavanje kreditnih garancija; unapređenje uslova za korišćenje lizinga i faktoringa od strane MSP; poboljšanje regulatornog okruženja, kao i uklanjanje administrativnih prepreka za uspostavljanje mikro-finansijske podrške.

(3) U Republici Srbiji uvodi se obrazovanje za preduzetništvo u obrazovni sistem, čime se povećava broj mladih koji se odlučuju da pokrenu svoje poslovanje. Međutim, i dalje postoji

nedostatak adekvatnog nastavnog kadra koji bi se uključio u sam proces razvoja preduzetničkog obrazovanja, tako da je neophodno preduzeti sledeće mere u cilju kontinuiranog razvoja ljudskih resursa: mere za usklađivanje formalnog obrazovnog sistema sa potrebama tržišta rada; razvoj neformalnog obrazovanja za unapređenje veština i znanja; redovno praćenje i predviđanje potreba MSP; kontinuirano obrazovanje i obuka nastavnika za preduzetništvo.

(4) Razvoj elemenata poslovne infrastrukture (industrijski klasteri, poslovni inkubatori, industrijski parkovi/zone i tehnološki parkovi) je od velikog značaja za razvoj MSP. Finansiranje izgradnje i rada poslovne infrastrukture, uglavnom je bilo zasnovano iz sredstava Nacionalnog investicionog plana, bilateralnih donacija, zajmova i kredita međunarodnih finansijskih institucija. Industrijski klasteri, industrijske zone, parkovi i poslovni inkubatori predstavljaju važan stub politike regionalnog razvoja Republike Srbije. MSP u Republici Srbiji ne prepoznaju dovoljno značaj inovacija za unapređenje poslovanja i nedovoljno ulažu u njih. Tek svako sedmo preduzeće sprovodi inovativne aktivnosti, a svako četrnaesto ostvaruje inovativnu saradnju sa nekim drugim privrednim subjektima ili institucijama. Mere koje se preduzimaju u cilju jačanja održivosti i konkurentnosti MSP su: sistemsko uređivanje razvoja poslovne infrastrukture; razvoj poslovne infrastrukture za potrebe regionalnog i lokalnog ekonomskog razvoja; razvoj poslovne infrastrukture namenjene inovativnim MSP; kreiranje novih lanaca vrednosti i povećanje stepena finalizacije proizvoda; podrška zajedničkom nastupu na tržištu.

(5) Stubom unapređenje pristupa novim tržištima obuhvaćene su mere koje se odnose na povećanje broja izvoznika, obima izvoza i kvaliteta izvoznih proizvoda MSP i podršku prilikom identifikacije potencijalnih tržišta za plasiranje proizvoda/usluga, kao izlazak i opstanak na istim. Za domaću privredu povećanje izvoza ima višestruki značaj. Rast izvoza istovremeno dovodi do povećanja privrednog rasta i nacionalnog dohotka, produktivnosti, kao i smanjenja nezaposlenosti. U narednom periodu jedan od prioriteta Vlade predstavlja rast izvoza i izlazak preduzeća iz Republike Srbije na nova tržišta. Sektorska struktura izvoza privrede Republike Srbije i dalje je nepovoljna uz dominaciju proizvoda niže faze prerade. Pored niskog stepena proizvodne specijalizacije za izvoz Republike Srbije karakteristično je da preovlađuje učešće nekoliko velikih važnih proizvodnih sistema (Fiat Automobili Srbija, Naftna industrija Srbije, Hemofarm, Valjaonice bakra i aluminijuma, Gorenje, Tigar Korporacija). Mere koje se ovde sprovode treba da MSP izvoznicima obezbede kvalitetnu podršku, približe izvozne procedure i olakšaju tehničku pripremu izvoza, zatim da unaprede kvalitet i dostupnost informacija o stranim tržištima; olakšaju uspostavljanje kontakta sa potencijalnim stranim poslovnim partnerima; da omoguće usklađivanje sa tehničkim propisima i standardima EU.

(6) U Republici Srbiji ne postoji strategija koja se direktno odnosi na razvoj preduzetništva žena. Činjenica je da žene predstavljaju manjinu i da se suočavaju sa specifičnim ograničenjima zato je bitno obezbediti im neophodnu podršku u svim fazama poslovanja, od započinjanja posla, upravljanja, rasta i razvoja pa do prestanka obavljanja delatnosti. U EU žensko preduzetništvo je prioritet, i brojnim aktivnostima se žene podstiču i motivišu da započnu svoje preduzetničko poslovanje. Vlada Republike Srbije nastoji da obezbedi dobro poslovno okruženje za razvoj ženskog preduzetništva. Zato je potrebno redefinisati postojeće mere gde je to moguće, odnosno uvesti neke nove mere podrške, koje su posebno usmerene ka svakoj od ovih ciljnih grupa, u skladu sa njihovim specifičnim potrebama. kroz razvoj usluga obuka, mentorstva i drugih oblika stručne podrške preduzetnicima neophodno je podržati žensko preduzetništvo, preduzetništvo mladih i socijalno preduzetništvo. Ovde se ističu važne mere kojima će se uspostaviti sistem redovnog praćenja preduzetništva žena, mladih i socijalnog preduzetništva; uključiti podrška ženskom preduzetništvu, preduzetništvu mladih i socijalnom

preduzetništvu u sva državna dokumenta; mere kojima će se uvesti program podrške za MSP namenjene isključivo za žene, mlade, socijalno preduzetništvo, kao i mere pomoću kojih će se vršiti promocija preduzetničkog duha, umrežavanje, primeri dobre prakse.

4. PERSPEKTIVE RASTA I RAZVOJA MALIH I SREDNJIH PREDUZEĆA U REPUBLICI SRBIJI

U savremenim uslovima nesumnjivo je veliki značaj razvoja sektora MSP. Zahvaljujući globalizaciji, sve većoj konkurenciji na tržištu, kao i razvoju informacione tehnologije došlo je do bitnih promena u njihovom poslovnom okruženju. Za sektor MSP je od izuzetne važnosti da se prilagode međunarodnom okruženju. Naime, globalizacija im omogućava da postanu konkurentna na međunarodnom planu, tako što im pruža priliku razvoja, kao i nove mogućnosti za učešće na međunarodnom tržištu. Ista ih, na neki način, motiviše da unaprede svoju konkurentnost, kao i kvalitet svojih proizvoda, i da se tako lakše suoče sa konkurencijom.

MSP sve više moraju da ulažu u obrazovanje, kao i obuke svojih zaposlenih, s obzirom da je jedan od ograničavajućih faktora rasta i razvoja MSP upravo nedostatak kvalifikovanih i visokokvalifikovanih kadrova. Zato se preporučuje postojanje odgovarajuće organizacione kulture, u kojoj je znanje jedna od najbitnijih vrednosti, i uvođenje novog metoda razvoja znanja, a to je e-učenje. Činjenica je da Republika Srbija značajno zaostaje za zemljama EU, kao i SAD u pogledu rasta, razvoja MSP. Kako bi vremenom postala ravnopravni partner na tržištu mora da poveća ulaganja u sistem obrazovanja, kao i u istraživanje i razvoj, kao i da poveća ICT sektor u privrednoj strukturi.

Ključni aspekti relevantni za perspektivu rasta i razvoja sektora MSP [6] proizilaze iz promena u: prirodni konkurencije u svetlu globalizacije, poslovnom okruženju u svetlu razvoja informacione tehnologije, prirodni faktora proizvodnje i strukturi novoostvarene vrednosti, modelu organizovanja preduzeća u smislu kvalitetnih veza radi stvaranja i protoka ideja i kreativnosti, značaju intelektualnog kapitala, kako po njegovom učešću u ukupnom kapitalu, tako i po njegovom doprinosu u stvaranju nove vrednosti, pogledu kompetencija i ulaganja u znanja zaposlenih, pogledu promene ulaganja u istraživanje i razvoj, pogledu privrednih struktura i nastajanja ICT sektora, pogledu ravnomernog regionalnog razvoja.

Perspektive za rast i razvoj u Republici Srbiji postoje i preporuka je da se preduzećima pomogne da pristupe novim tržištima u EU, da povećaju informisanost o istim, da poboljšaju tehničke i upravljačke kvalifikacije, kao i da vrše redovne obuke svojih zaposlenih. Za nesmetani dalji rast i razvoj MSP potrebno je obezbediti stabilno makroekonomsko okruženje, takođe, kreirati i stimulatívno poslovno okruženje, koje vrlo lako može da obezbedi finansijska sredstva, ali i druge vidove podrške sektoru MSP. Pored toga, treba stvoriti povoljnu klimu za strana ulaganja, kao i da se kontinuirano prate inovacije iz informaciono-komunikacionih tehnologija, i da se zapošljavaju visokostručni i kompetentni kadrovi.

5. ZAKLJUČAK

Sektor malih i srednjih preduzeća promoviše privatnu svojinu i preduzetničke veštine, i doprinosi značajnom unapređenju nacionalne konkurentnosti. Prema mišljenju mnogih ekonomista i eksperata, mala i srednja preduzeća su sinonim za privatni sektor, i u figurativnom smislu za preduzetništvo. Njihova komparativna prednost ogleda se u njihovoj fleksibilnosti, kao i u mogućnosti da se vrlo brzo adaptiraju na promene i da zadovolje sve veće zahteve na tržištu, kako domaćem, tako i međunarodnom.

Republika Srbija još uvek zaostaje u odnosu na zemlje EU, što je sasvim razumljivo, ukoliko uzmemo u obzir negativne posledice svetske finansijske i ekonomske krize, koje su se odrazile na poslovanje sektora MSP i na privredu Srbije. Pri tome, od posebnog značaja je i spremnost sektora MSP za brže osvajanje tržišta Evropske Unije, usvajanje potrebnih standarda, kao i smanjivanje razlika u nivou razvijenosti.

MSP su najosetljivija na promene u okruženju i zato se suočavaju sa mnogim problemima (otežana naplata potraživanja, veći rizik i troškovi ulaganja, manji priliv investicija, smanjena spoljna i unutrašnja tražnja, povećan strah od neuspeha, loša kreditna sposobnost...) i upravo su ovi problemi i uticali na njihov znatno slabiji i lošiji položaj na tržištu i na usporavanje dinamike sprovođenja strukturnih reformi, kao i ukupne privredne aktivnosti.

U cilju prevazilaženja pomenutih problema i ograničenja koja postoje tokom razvoja MSP (pravne i administrativne barijere, ograničen pristup finansijskim izvorima, nedostatak resursa neophodnih za poslovanje, otežan pristup važnim informacijama, nedovoljno znanja iz oblasti menadžmenta i nepostojanje adekvatne institucionalne infrastrukture...), kao i usklađivanja sa principima koje definiše EU, Vlada Republike Srbije donosi Strategiju za podršku razvoja malih i srednjih preduzeća, preduzetništva i konkurentnosti za period od 2015. do 2020. godine i Akcioni plan za sprovođenje strategije za podršku razvoja malih i srednjih preduzeća, preduzetništva i konkurentnosti za 2015. sa projekcijom za 2016. godinu. Ova Strategija je kompatibilna sa „Evropskom poveljom o malim preduzećima“ (*The European Charter for Small Enterprises*) i „Aktom o malim preduzećima“ (*Small Business Act*).

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UTJECAJ PODUZETNIČKE ORIJENTACIJE NA POSLOVANJE PODUZEĆA

INFLUENCE OF ENTREPRENEURIAL ORIENTATION ON COMPANY BUSINESS

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Sadržaj: Cilj ovog rada je detaljnije razumijevanje kako poduzetnička orijentacija utječe na uspješnost poslovanja poduzeća. Ispituje se odnos između pet dimenzija poduzetničke orijentacije (inovativnost, proaktivnost, preuzimanje rizika, autonomija i konkurentnost) i uspješnosti poslovanja poduzeća. Istraživanje je provedeno tijekom 2017. godine u hrvatskim poduzećima. Rezultati su pokazali da postoji pozitivna i statistički značajna povezanost između inovativnosti, proaktivnosti i konkurentnosti s uspješnosti poslovanja poduzeća.

Ključne riječi: Poduzetnička orijentacija, inovativnost, proaktivnost, preuzimanje rizika, autonomija, konkurentnost, uspješnost poslovanja

Abstract: The aim of this paper is to understand in more detail how entrepreneurial orientation affects the company's business performance. The relationship between the five dimensions of entrepreneurial orientation (innovation, proactivity, risk taking, autonomy and competitiveness) and business performance is studied. The research was conducted in 2017 in Croatian companies. The results have shown that there is a positive and statistically significant correlation between the innovativeness, the proactivity and the competitiveness of the company's business performance.

Keywords: Entrepreneurial orientation, innovation, proactivity, risk taking, autonomy, competitiveness, business success

UVOD

Poduzetništvo je način razmišljanja, donošenja zaključaka i rada u kojem osoba neprestano traži prilike, primjenjuje holistički pristup i uravnoteženo vodstvo kako bi se stvarala vrijednost i iskoristile prilike [1]. Uspjeh tvrtke u određenom poslovnom okruženju ovisi o poduzetničkoj orijentaciji tvrtke. Dubina, I. N. i Carayannis, E.G zagovaraju kreativnost, inovacije i poduzetništvo kao ključne čimbenike za razvoj tvrtke i društva u cjelini [2]. Proučavanje poduzetničke orijentacije razvilo se iz područja strateškog menadžmenta [3]. Prema Milleru D. poduzetnička tvrtka je ona koja inovira na tržištu gotovih proizvoda, kreće u donekle rizične pothvate i prva stvara „proaktivne” inovacije, pretičući svoju konkurenciju [4]. Poduzetnička orijentacija odražava stupanj kretanja ciljeva rasta tvrtki na temelju

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identifikacije i iskorištavanja neiskorištenih tržišnih prilika [5]. Lumpkin, G. T. i Dess, G. G. razvili su model poduzetničke orijentacije i predložili okvir za istraživanje koji se sastoji od pet dimenzija: inovativnosti, proaktivnosti, preuzimanja rizika, autonomije i konkurentnosti [6]. Proaktivnost određuje tvrtkin položaj prema inovativnim idejama i dovođenju tih ideja do realizacije [7]. Preuzimanje rizika bitan je element poduzetničke orijentacije i općenito rizik uvijek postoji uz inovacije s ciljem da inovacija bude uspješna [8]. Autonomija u tvrtki poboljšava poslovnu praksu te podrazumijeva poduzimanje akcija bez organizacijskih ograničenja [9]. U studiji Lumpkin, G. T. i Dess, G. G. pokazuju da je proaktivnost u pozitivnoj vezi s performansama, ali se konkurentna agresivnost slabo povezuje s performansama [10]. Lumpkin, G. T., Brigham, K. H. i Moss, T. W. utvrdili su pozitivan odnos između dugotrajnog poslovanja i pet dimenzija poduzetničke orijentacije, unatoč činjenici da dimenzije mogu međusobno utjecati jedna na drugu [11]. Morris, M. H., Kuratko, D. F i Covin, J. G. navode da povećanje inovativnosti podrazumijeva preuzimanje većeg rizika i naglašavaju da je odnos vrlo složen. Autori tvrde da tvrtke preuzimaju velike rizike kada se rade radikalne inovacije koje pružaju nova otkrića, koje stvaraju nove tržišne dionike i redefinišu industrije [12]. Preuzimanje rizika dolazi s eksperimentiranjem koje je neizbježno i obuhvaća mogućnost neuspjeha tvrtke [13]. Prema Basso, O., Fayolle, A. i Bouchard, V. dimenzija autonomija je već prisutna u preuzimanju rizika, dok se dimenzija konkurentna agresivnost može razlikovati od dimenzije proaktivnosti. Autori predlažu kritičku procjenu razvoja instrumenta, što je preliminarno stanje za poboljšanje njegove operacionalizacije [14]. Casillas, J. C. i Morena, A. M. pokazuju da postoji značajna pozitivna povezanost između dvije dimenzije poduzetničke orijentacije: proaktivnosti i inovativnosti [15]. Većina studija o poduzetničkoj orijentaciji pokazuju pozitivnu povezanost između poduzetničke orijentacije i uspješnosti tvrtke [16], [17], [18]. Svrha studije Gupta, V. K. i Gupta, A. je razumjeti odnos između poduzetničke orijentacije i uspješnosti tvrtke na uzorku velikih njemačkih tvrtki za razdoblje od 1999. do 2008. godine. Nalazi pokazuju da poduzetnička orijentacija ima snažan početni učinak na uspješnost tvrtke i da taj učinak postupno s vremenom opada. Konkurentski intenzitet i potražnja utječu na učinak poduzetničke orijentacije na uspješnost u dugoročnom razdoblju [19]. Povećani broj studija može upućivati na moguće zasićenje u području tradicionalnih studija o poduzetničkoj orijentaciji, stvarajući nove istraživačke pristupe i otvaranje prostora za nove znanstvene doprinose.

ULOGA INOVATIVNOSTI U KONCEPTU PODUZETNIČKE ORIJENTACIJE

U vrijeme globalizacije i tehnoloških dostignuća inovativnost je bitna u razvoju tvrtki i cjelokupnoga gospodarstva. Pozitivni učinci inovativnosti za gospodarstvo su brojni i ogledaju su u povećanju zaposlenosti, bruto društvenog proizvoda, izvoza, deviznog priljeva, razmjeni novih tehnologija i u povećanju konkurentnosti. O pojmu inovativnosti u znanstvenoj literaturi raspravlja se s velikim zanimanjem. Inovativnost se odnosi na napore tvrtke da razvija i podržava nove ideje, eksperimente i kreativne procese koji bi mogli rezultirati novim proizvodima, uslugama ili tehnološkim procesima [20]. Inovativnost tvrtke koncipirana je prema stopi usvajanja inovacija i spremnosti organizacije na promjenu koja se usredotočuje na tehnološki razvoj [21]. Inovativnost definira kao djelotvornu primjenu procesa i novih proizvoda u organizaciji koji su dizajnirani da donesu korist tvrtki i dioničarima [22]. Prema navedenim definicijama, svim vrstama inovacija zajedničko je da sadrže stupanj novosti i da je komercijalizirana. Inovacije su jedan od ključnih čimbenika konkurentnosti tvrtke. Prema Baldwin, J. R. i Hanel, P. interni izvori inovacija obuhvaćaju istraživanje i razvoj, proizvodna područja, menadžment, prodaju i marketing. Vanjski izvori obuhvaćaju: dobavljače, kupce, savjetnike, konzultante, privatne institucije za istraživanje i razvoj, vladine agencije za razvoj, konkurenciju, natjecanje, poslovna zbivanja konferencije i/ili sastanke. Interni izvori za nove

tehnologije su: proizvodnja, inženjering, istraživanje i eksperimentalni razvoj. Vanjski izvori novih tehnologija obuhvaćaju publikacije, sveučilišne laboratorije, vladine laboratorije, industrijske istraživačke tvrtke, konzultante, dobavljače tvrtke [23]. Prema rezultatima studije Romagnoli, A. i Romagnoli, M. talijanskom industrijskom sustavu nedostaje dosljedna institucionalna i strukturna politika koja olakšava napore tvrtki prema novim tehnologijama [24]. Rodriguez, M., Doloreux, D. i Shearmur, R. istaknuli su da inovativnost tvrtke ovisi o njezinoj sposobnosti da učinkovito integrira i koordinira širok raspon vanjskih izvora znanja [25], dok manje profitabilne tvrtke mogu dobiti više od povećanja menadžerske učinkovitosti za inovacije u odnosu na profitabilnije veće tvrtke [26]. Može se utvrditi da tvrtka treba poticati inovativnost koja čini svrhovito traganje za promjenama koje mogu utjecati na povoljne poslovne prilike i primjenjivati koncept poduzetničke orijentacije.

POVEZANOST PODUZETNIČKE ORIJENTACIJE I USPJEŠNOSTI POSLOVANJA

Trokut inovacijskog uspjeha je konceptualizacija čimbenika poslovnog okruženja, regulatornog okruženja i okruženja inovacijske politike o čijem rasponu ovisi nacionalni inovacijski uspjeh. Uspjeh zahtijeva ispravno strukturiranje svih triju stranica inovacijskog trokuta [27]. Prema Covin, J. G. i Slevin, D. P. uspješnost tvrtke najčešće se izražava kroz dimenzije rasta i profitabilnosti [28]. Kao indikator rasta koristi se i tržišni udio [29]. U meta analizi studije o poduzetničkoj orijentaciji navodi se da koncept uspješnosti poslovanja mjerio samo u sedam studija arhivskim financijskim mjerama [30]. Istodobno među znanstvenicima postoji velik izbor široko prihvaćenih subjektivnih mjera uspješnosti. Razlozi za korištenje subjektivnih mjera uspješnosti najčešće su nedostatak javno dostupnih financijskih podataka [31]. Istraživanje utvrđuje da se inovacija vrijednosti pojavljuje samo ako tvrtke povežu inovaciju s korisnošću, cijenom i stanjem troška. Ne uspiju li zadržati siguran položaj inovacije i vrijednosti na opisani način, inovatori u tehnologiji i oni koji predvode tržište često polažu temelje za poslovni uspjeh drugih tvrtki [32]. Gaynor, G. H. navodi da su inovacije često povezane s organizacijskim tehnološki vezanim aktivnostima, kao što su istraživanje i razvoj, proizvodnja te informacije [33]. Svaka uspješna tvrtka zahtijeva inovacije iz svih organizacijskih odjela. Inovacija proizvoda bez popratne inovativnosti u upravljanju ili prodaji rezultirat će minimalnom dobiti. Inovacija proizvoda bez odgovarajuće inovativnosti u proizvodnji smanjit će potencijalnu maksimalnu dobit. Inovacija proizvoda bez inovativnih načina za rješavanje potrošačkih zahtjeva ugrožit će kredibilitet tvrtke.

METODOLOGIJA I REZULTATI ISTRAŽIVANJA

Kako bi se osigurale što vjerodostojnije i pouzdanije spoznaje o istraživačkoj temi, za potrebe izrade rada u skladu s pretpostavljenim ciljevima empirijsko istraživanje je provedeno metodom anketiranja u zadnjem tromjesečju 2017. godine. Opseg statističkog skupa je 77 slučajno odabranih menadžera u preko 50 poduzeća sa sjedištem u Republici Hrvatskoj. Statističkim metodama dedukcije, indukcije te deskriptivne, korelacijske i regresijske analize se proučava povezanost inovativnosti i poduzetničke orijentacije s uspješnosti poslovanja poduzeća. Pretražene su i elektronički dostupne baze podataka, kako bi se osigurao pristup recentnim svjetskim studijama povezanim sa svrhom istraživanja.

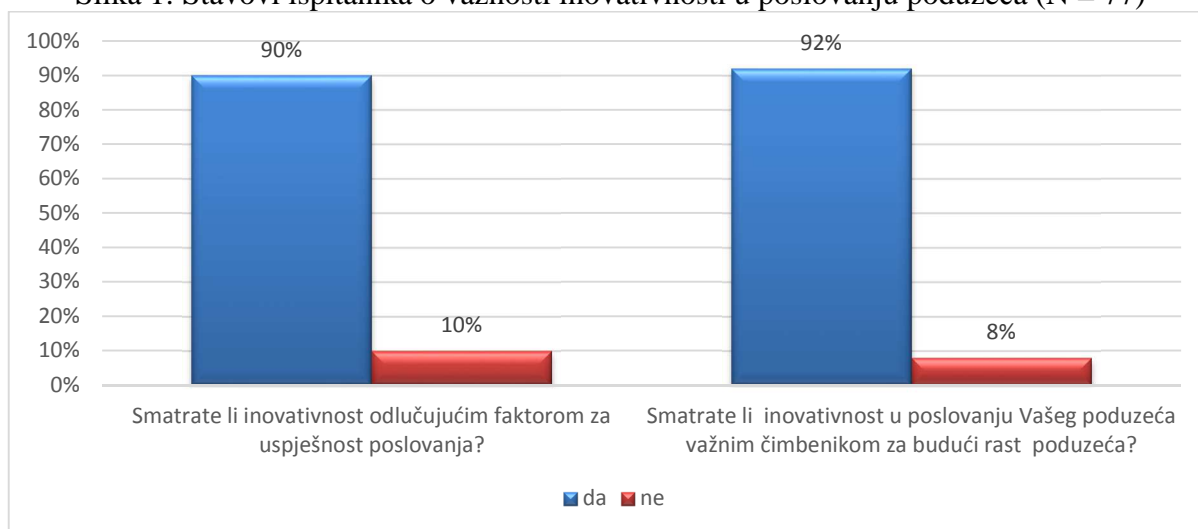
U tablici 1 su prikazani rezultati regresijske analize kojom je analizirana povezanost svake dimenzije poduzetničke orijentacije (proaktivnost, autonomnost, preuzimanje rizika, konkurentnost i inovativnost) s uspješnošću poslovanja poduzeća.

Tablica 1: Povezanost dimenzija poduzetničke orijentacije s uspješnosti poslovanja (r je oznaka za Pearsonov koeficijent linearne korelacije, a p označava statističku signifikantnost)

| | Uspješnost poslovanja |
|--------------------|-----------------------|
| Proaktivnost | $r = 0,42, p < 0,01$ |
| Autonomnost | $r = 0,08, p > 0,05$ |
| Preuzimanje rizika | $r = 0,05, p > 0,05$ |
| Konkurentnost | $r = 0,25, p < 0,05$ |
| Inovativnost | $r = 0,40, p < 0,01$ |

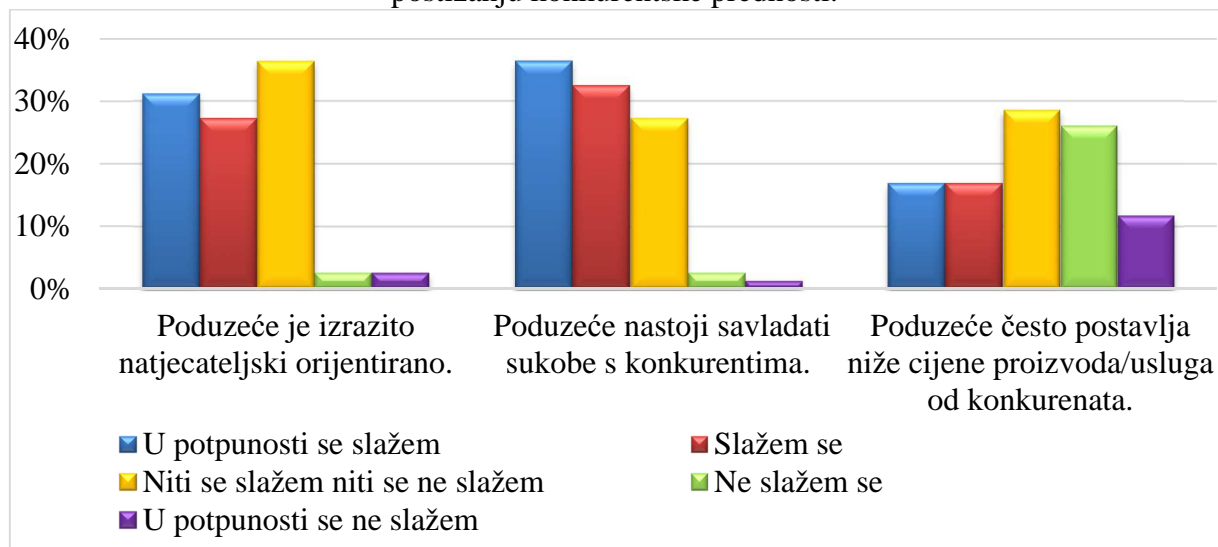
Od 5 dimenzija poduzetničke orijentacije, njih tri (proaktivnost, konkurentnost i inovativnost) su u pozitivnoj i statistički značajnoj vezi s uspješnosti poslovanja, dok kod preostale dvije dimenzije (autonomnost i preuzimanje rizika) nije pronađena statistički značajna povezanost s uspješnosti poslovanja poduzeća. Preko 65% ispitanih poduzeća se smatra proaktivnima i inovativnima, odnosno većina menadžera smatra da su proaktivnost i inovativnost važni za uspješnost poslovanja te smatraju da su njihovi poslovni procesi usmjereni na proaktivno i inovativno poslovanje. 10% menadžera smatra da proaktivnost i inovativnost nisu potrebni za uspješno poslovanje (slika 1).

Slika 1: Stavovi ispitanika o važnosti inovativnosti u poslovanju poduzeća (N = 77)



Analizirajući tvrdnje o konkurentnosti, većina poduzeća se smatra vrlo natjecateljski orijentirana i žele nadjačati konkurenciju, ali većina poduzeća konkurentsku prednost ne želi postići nudeći niže cijene od konkurencije (slika 2). Način na koji većina ispitanih poduzeća postiže konkurentsku prednost je povećanjem vrijednost kupcima za što su preduvjeti inovativno i proaktivno poslovanje.

Slika 2: Stavovi ispitanika o konkurentskoj orijentaciji poduzeća te uporabi nižih cijena u postizanju konkurentske prednosti.



U tvrdnjama vezanim za preuzimanje rizika je utvrđena vrlo visoka razina averzije prema riziku. Većina menadžera smatra da se smionim potezima postižu ciljevi poduzeća, ali oni ipak preferiraju nerizične projekte i radije oprezno posluju, čak i ako bi i time izgubili poslovnu priliku. S druge strane, okruženje tjera poduzeća da ipak posluju rizičnije nego što bi oni htjeli, što je odraz nepovoljne poduzetničke klime u Hrvatskoj. Rezultati grupe pitanja dimenzije autonomnosti potvrđuju već navedeno, da menadžeri preferiraju sporiji i sigurniji rast bez korištenja vanjskih (tuđih) izvora financiranja (slika 3).

Slika 3: Stavovi ispitanika o averziji menadžmenta prema riziku, važnosti poduzimanja smionih poteza i stupnju rizičnosti u poslovanju.



Promatrajući demografska obilježja ispitanika (spol i dob) i demografska obilježja poduzeća (godina osnivanja, mjesto sjedišta, veličina aktive, djelatnost) nisu uočena statistički značajna odstupanja među odgovorima anketnog upitnika.

ZAKLJUČAK

U uvjetima današnje dinamične poslovne okoline poduzetnička orijentacija predstavlja važan prediktor prosperiteta svakog poduzeća. Rezultati studije pokazuju da poduzetnička orijentacija značajno doprinosi uspješnosti poslovanja poduzeća. Dimenzije poduzetničke orijentacije proaktivnost, konkurentnost i inovativnost su u pozitivnoj i statistički značajnoj vezi s uspješnosti poslovanja poduzeća, te većina menadžera u Hrvatskoj posluje proaktivno i inovativno kako bi ostvarili bolje rezultate. Za dimenzije preuzimanje rizika i autonomnost nije utvrđena statistički značajna veza. Većina menadžera smatra da se preuzimanjem rizika postižu bolji poslovni rezultati, ali zbog loše poduzetničke klime u Hrvatskoj većina ih preferira nisko rizične projekte/poslove s nižim stopama povrata, koji se financiraju vlastitim sredstvima. Studija pokazuje da je većina tvrtki posluje inovativno kako bi svoju konkurentnost prednost postiglo povećavajući vrijednost za kupce, a ne snižavajući cijene. Menadžeri mogu koristiti rezultate kako bi utjecali na obavljanje različitih funkcija u tvrtki i povećali ukupni poslovni uspjeh poduzeća. Znanstveni doprinos ovoga rada je popunjavanje praznine u literaturi istražujući hrvatske tvrtke posredstvom odnosa između poduzetničke orijentacije i uspješnosti poslovanja. Uz navedeno, istraživanje bi trebalo pridonijeti rezultatima koji će biti od praktične koristi svim tvrtkama kojima nova saznanja mogu pomoći u planiranju sudjelovanja na međunarodnim tržištima i u smislu donošenja kvalitetnijih odluka. Jednako tako, može poslužiti studentima i svim gospodarskim subjektima u produbljanju ekonomskog znanja.

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INSIGHT INTO THE CAUSES OF THE AGROKOR CONGLOMERATE FAILURE

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Abstract: *The Agrokor Group is the largest privately-owned company in Croatia and one of the biggest employers in the surrounding economies, with thousands of heterogeneous suppliers involved in its vertically integrated system. This paper provides insight into the (hi)story of the conglomerate and its failure that caused unprecedented public turmoil. Based on the traditional postulation of internal or external factors that crucially run the show, we lean our discussion on the seminal work of John Argenti and the government's role among usual exogenous cause suspects.*

Keywords: *Agrokor, business failure, attributions / causes, management, government.*

1. INTRODUCTION

With about 60,000 employees spread over Croatia, Slovenia, Serbia, Bosnia-Herzegovina and Hungary, it would be hard to overstate the company's importance to Croatia and the surrounding region. The second part of the article briefly describes the business community growing skepticism about Agrokor's ability to service its debt liabilities and the culmination in the "perfect storm" that placed the distressed conglomerate under a reorganization regime set up by the government. Part three gives a kind of reality check, by presenting a snapshot of the financial situation after audit and revision. Starting from the deterministic and voluntarist viewpoints on business failure research, the causes of Agrokor's failure were discussed from the internal/external factors perspective in chapter four, followed by concluding considerations.

2. AGROKOR'S RISE AND FALL

The company was founded as a family-owned flower business in the 1976. In the last two decades, it grew into the largest Croatian company, spanning the Western Balkans and becoming one of largest family-owned businesses in Europe.⁴³ With a 95.52% share, the parent company is Adria Group Holding B.V. Netherlands, controlled by Mr. Ivica Todorić, Agrokor's founder.⁴⁴

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⁴³ According to data compiled in mid-2017 by the Center for Family Business of the University of St. Gallen and the EY's Global Family Business Center of Excellence, Agrokor was ranked 222nd among the largest 500 family firms around the globe [1].

⁴⁴ He was chairman and CEO from the beginning until the opening of the emergency management procedure in April 2017, when Mr. Todorić and his management board were removed from their posts.

By the mid-1980s, Agrokor had become Yugoslavia's market leader in the flower trade, after which it expanded into the import and export of fruit and vegetables, oil crops and cereals. Among other acquisitions within the newly independent Croatia in the mid-1990s, Agrokor gained ownership of three market leaders: Zvijezda (edible oil and margarine producer), Jamnica (bottled water company) and Ledo (ice cream and frozen food manufacturer). In 1994, Agrokor acquired the Croatian grocery retailer Konzum, which was a €300m business with 200 stores. A decade later, in 2005-2007, Agrokor purchased Belje, PIK Vrbovec, Agrolaguna and Tisak – Croatia's largest or top companies in agriculture and livestock breeding, meat production, viticulture, olive growing, and tobacco retail and newsstands. On its expansive path in Croatia, virtually no acquisition opportunity was overlooked, resulting in dozens of non-core market side-projects in tourism, advertising, printing, construction and civil engineering, etc. During the same period, several acquisitions in neighboring countries were made, as well as heavy investments in overall modernization and upgrades of Agrokor's businesses.

Over the next two decades, Agrokor's retail flagship Konzum transformed into a €3bn business operating approximately 1,000 stores in three countries (Croatia, Bosnia-Herzegovina, and Serbia). Together with Serbia's Delta Group and Slovenia's Mercator, Konzum was one of three key players in the regional food and retail market. Reportedly Agrokor tried several times to merge all three companies; what is certain is that Agrokor made several unsuccessful attempts to take over Mercator, before finally striking a deal in September 2014. This was the company's most significant deal, roughly doubling the size of Agrokor's retail business. At that time, Mercator was heavily indebted (€1.1bn), struggling both financially and operationally. The total value of the takeover transaction was €544m, out of which €324m were used for the acquisition, €200m for deleveraging Mercator's financial position and €20m for Mercator's operational working capital requirements. The acquisition created the largest retailer in much of the former Yugoslavia while pressure on the margin was rising, exercised by West European retailers (Belgium's Delhaize and Germany's Schwartz group) investing in the region.

By the end of 2016, the vertically integrated conglomerate controlled the entire supply chain, with a presence in grocery and non-food retail, food production, agriculture and tourism. For the twelve-month period to the end of September, the group generated consolidated revenues of €6.4bn. However, due to increased competition and failure to reap the expected benefits from the Mercator acquisition, the toxic combination of rapid expansion, over-investment, low profitability and high-cost borrowing became indigestible. Compared to a typical ratio of three for the retail industry, Agrokor's ratio of net debt to trailing 12-month EBITDA was pending at levels more than twice that.

The avalanche of negative public news began on January 2, 2017 as Moody's Investors Service downgraded Agrokor's corporate family rating to B3 from B2 and its probability of default rating to B3-PD from B1-PD [2]. The anxiety among investors began to unfold after only two weeks, when Agrokor's bond prices began their precipitous decline.

As of September 30, 2016, Agrokor's payables were HRK 16.2bn (€2.175bn), which translates to 150 of days payables outstanding. With limited access to debt (or equity) and the deterioration of the group's operating performance, prudent management of pending debt maturities was of crucial importance. From investors to suppliers, the interested parties sought a rapid resolution of a problem that objectively needed time to be resolved in 2017. However, time was running out, and running out fast: fearing for their claims, the company's financially exhausted Croatian suppliers flocked together and called on the government to protect their rights. The company's management decided to operate in "*silenzio stampa*," not holding any

press conferences or releasing statements, thus only prodding speculation about imminent collapse due to a lack of information. Considering the weakened support from suppliers, Moody's voiced the opinion that the company is no longer able to sustain its high level of trade payables. While the HRK 2.29bn (€307m) in cash and cash equivalents reported at the end of September 2016 exceeded the HRK 959m (€127m) of short-term debt, Moody's estimated that the company's liquidity would not suffice to finance a reduction in payables [3].

While Agrokor announced its intention to appoint an independent global restructuring advisor, the Croatian government apparently had other plans. Facing a political challenge, policymakers speedily and silently prepared a new piece of legislation to handle cases of financial distress in especially large enterprises. On April 6, 2017, the Croatian Parliament passed the Emergency Management Act (EMA). Besides ordinary pre-bankruptcy and bankruptcy procedures, EMA instituted a special reorganization regime for any distressed company "of systemic importance" and was expeditiously published on the same date and became effective on the next day. Although the government stated otherwise⁴⁵, the law's main purpose was obvious, and therefore the EMA is commonly referred to as "Lex Agrokor."

Mr. Todorčić and his management board filed the activation of the new legislation for Agrokor on the same day the EMA went into force. Three days later, on April 10, 2017, the Commercial Court appointed the emergency trustee for the company. From that moment onward, Agrokor's owner had no influence nor did he participate whatsoever in the management of his financially troubled business empire. This point on the timeline can be marked as the end of one era in the company's life cycle and the beginning of a new subsistence⁴⁶, inviting us to discuss closer the causes of failure. Before doing so, we will give a short insight into Agrokor's revised numbers.

3. THE AUDITED AND REVISED FINANCIAL STATEMENTS

The audited financial statements of Agrokor d.d. and the consolidated financial statements of the Agrokor Group were finally released in October 2017. The audit encompassed 27 companies subject to statutory audit in Croatia, and 3 companies in Serbia and Bosnia-Herzegovina, respectively. The scope of the consolidation for 2016 consists of 80 companies, 42 of them in Croatia.

The published 2016 results and restated 2015 results after an audit performed by PricewaterhouseCoopers (PwC) revealed a gloomy picture of accounting irregularities and value adjustments, along with a deterioration in operating performance (tables 1-3). The audit results contained "significant adjustments" to Agrokor's statements from preceding periods. The total equity decrease (impairment) of the Group from FYE 2014 to FYE 2016 amounted to HRK 21.7bn, with the loss in 2016 totaling HRK -11bn. The loss in 2015 was HRK -3.6bn, as opposed to the HRK 1.2bn in profits stated by reports that were audited by Baker Tilly Croatia. PwC's adjustments in the report for 2015 emerged from reported accounting irregularities, including, *inter alia*, undisclosed liabilities of HRK 3.9bn, undisclosed operating and financial

⁴⁵ Explaining to Parliament the reasons why this bill was proposed, Croatian Prime Minister Andrej Plenković said that "...*(t)he bill on emergency receivership in systemically important companies is not a bill for Ivica Todorčić, it is not 'Lex Agrokor', it is a bill whereby Croatia and the government are protecting the interests of the Croatian financial system, the economy, the workers and employees of Agrokor, family farms, suppliers and all stakeholders that are currently involved in the processes connected to that largest Croatian company*" [4].

⁴⁶ Agrokor creditors reached a „going concern“ settlement, in October 2018 confirmed by the High Commercial Court. Over the forthcoming settlement implementation period, all companies will continue with their operations and the business activities will be transferred to a new holding entity whose ownership structure will consist entirely of (past) creditors.

expenses from 2010 to 2015 (HRK 2.2bn) and improper classification of cash and cash equivalents (HRK 2.1bn).

The accentuated accounting irregularities that compelled the swinging equity adjustment (figure 1) were derived from (I) the non-disclosure of operating and financial expenses in the P&L account, inappropriate classification of borrowings as equity, inappropriate classification of receivables from loans as cash and cash equivalents, the non-consolidation of an Agrokor subsidiary (AdriaticaNet); (II) value adjustments of intangible and tangible assets and inventories; as well as (III) other effects on equity in 2015 and 2016 e.g. equity adjustments resulting from the reclassification of operating leases into financial leases and the increase of costs and drop in revenues in 2016.

Table 1: The Agrokor Group's consolidated P&L statement for 2016 and 2015

| in €000, FYE | 2016 | 2015* |
|---|-------------------|------------------|
| Revenue | 5,630,783 | 5,985,884 |
| Sale of services | 459,379 | 242,114 |
| Other income | 19,139 | 25,707 |
| | 6,109,301 | 6,253,705 |
| Changes in inventories of finished goods and work in progress | 34,516 | -22,285 |
| Cost of materials and goods sold | 4,283,812 | 4,453,162 |
| Cost of services | 665,909 | 544,297 |
| Staff costs | 630,064 | 616,109 |
| Depreciation and amortization | 584,029 | 446,328 |
| Other costs | 908,568 | 304,011 |
| Sale of properties, net | 16,999 | 6,974 |
| | 7,123,897 | 6,348,597 |
| Financial income | 97,946 | 101,149 |
| Financial expenses | 562,235 | 433,705 |
| | -464,289 | -332,557 |
| Share of loss of associates | 1,055 | -518 |
| LOSS BEFORE TAX | -1,477,829 | -427,967 |
| Taxation | -16,104 | 43,961 |
| LOSS FOR THE YEAR | -1,461,725 | -471,928 |
| Attributable to: | | |
| Equity holders of the parent | -1,337,319 | -497,034 |
| Non-controlling interests | -124,405 | 25,105 |

Note: * PwC's restated data for FYE 2015. HRK/€ exchange rate: 31 Dec.

Source: Author's work, based on [5].

Table 2: The Agrokor Group's consolidated balance sheet for 2016 and 2015

| in 000 EUR, FYE | 2016 | 2015* |
|--|-------------------|------------------|
| ASSETS | | |
| NON-CURRENT ASSETS | | |
| Property, plant and equipment | 3,297,920 | 3,271,196 |
| Investment property | 31,829 | 29,201 |
| Intangible assets | 167,043 | 450,965 |
| Biological assets | 56,559 | 56,531 |
| Investments in associates using the equity method | 36,476 | 22,897 |
| Other non-current financial assets | 284,471 | 421,025 |
| Deferred tax assets | 26,362 | 21,169 |
| TOTAL NON-CURRENT ASSETS | 3,900,660 | 4,272,985 |
| CURRENT ASSETS | | |
| Inventories | 697,436 | 829,210 |
| Biological assets | 43,430 | 47,226 |
| Assets held for sale | 16,257 | 236,991 |
| Loans and deposits | 111,518 | 215,304 |
| Accounts receivable | 457,701 | 804,977 |
| Recourse receivable | 62,010 | 148,722 |
| Other current assets | 161,802 | 186,093 |
| Cash and cash equivalents | 73,697 | 78,198 |
| TOTAL CURRENT ASSETS | 1,623,851 | 2,546,722 |
| TOTAL ASSETS | 5,524,510 | 6,819,706 |
| EQUITY AND LIABILITIES | | |
| EQUITY ATTRIBUTABLE TO EQUITY HOLDERS OF THE PARENT | | |
| Share capital | 23,833 | 23,592 |
| Reserves | -2,392,817 | -989,007 |
| | -2,368,984 | -965,415 |
| NON-CONTROLLING INTERESTS | 445,971 | 581,862 |
| TOTAL EQUITY | -1,923,013 | -383,553 |
| LIABILITIES | | |
| NON-CURRENT LIABILITIES | | |
| Borrowings | 3,585,228 | 3,223,535 |
| Provisions | 58,394 | 78,550 |
| Deferred tax liability | 78,488 | 135,809 |
| Other non-current liabilities | 37,528 | 50 |
| TOTAL NON-CURRENT LIABILITIES | 3,759,638 | 3,437,944 |
| CURRENT LIABILITIES | | |
| Accounts payable | 1,402,450 | 1,324,147 |
| Bills of exchange and recourse liabilities | 227,365 | 251,230 |
| Income tax payable | 12,374 | 16,965 |
| Borrowings | 1,718,074 | 1,880,935 |
| Liabilities due to shareholders for dividends | - | 437 |
| Other current liabilities | 327,622 | 291,601 |
| TOTAL CURRENT LIABILITIES | 3,687,885 | 3,765,315 |
| TOTAL LIABILITIES | 7,447,523 | 7,203,259 |
| TOTAL EQUITY AND LIABILITIES | 5,524,510 | 6,819,706 |

Note: * PwC's restated data for FYE 2015. HRK/€ exchange rate: 31 Dec.

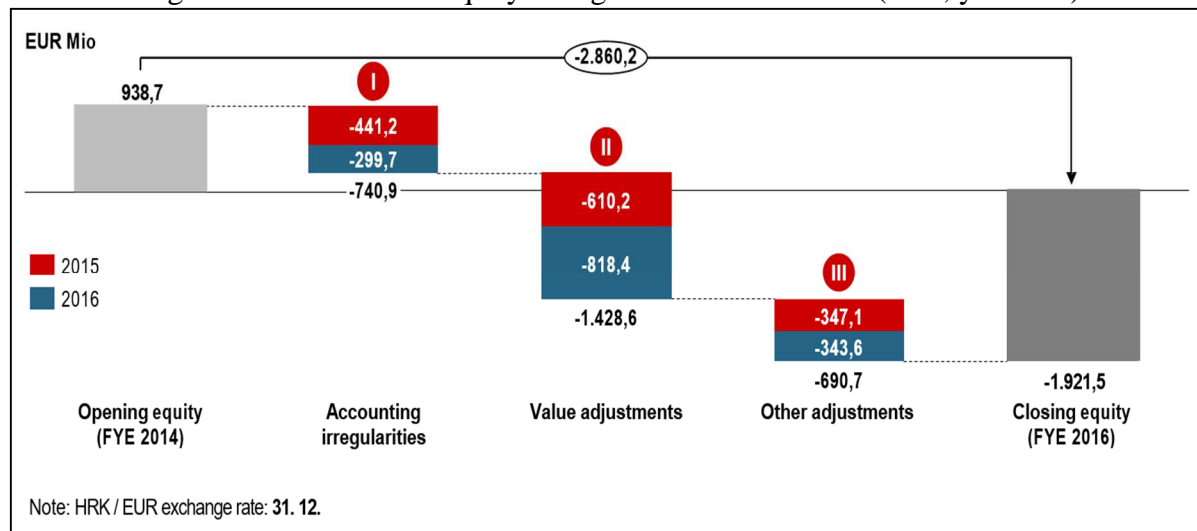
Source: Author's work, based on [5].

Table 3: Overview of Agrokor's leverage ratios for 2016 and restated 2015

| | 2016 | 2015 |
|----------------------------------|--------|------|
| Total debt/adjusted EBITDA | -16.1x | 6.2x |
| Net debt/adjusted EBITDA | -15.8x | 5.5x |
| Adjusted EBITDA/interest expense | -0.7x | 1.8x |
| Total debt/equity | -2.9x | 3.4x |
| Cash/short-term debt | 0.0x | 0.4x |

Source: Author's work, based on [5], [6].

Figure 1: Consolidated equity change from 2014 to 2016 (in €, year-end)



Source: Author's work based on [5].

4. ATTRIBUTIONS/CAUSES OF FAILURE

Our (brief) discussion of failure causes is based on the typical postulation of external or internal factors that crucially run the show. From seminal works dating some four decades back, it is deeply rooted into today's deterministic and voluntarist school of thoughts [7].

In Agrokor's specific case, the auditor's findings together with the indicated lack of corporate governance⁴⁷ suggest that the deterministic perspective of business failure has no firm foothold. Among "usual suspects" in external failure causes, viz. economic change, competitive change, government constraints, social and technological change [9] we cannot find plausible evidence of exogenous factors, except for the possibility of government's influence. Since the business story of Agrokor fits fairly well into the crony capitalism picture [10], it is not difficult to imagine that a company can grow to systemic "importance" by political protection or favoritism. If the company's crown outgrows the government, a system of patronage can indeed arise, with the business(man) having the upper hand in political and/or economic issues of interest. From the business(man) perspective, the government's change of attitude (i.e. withdrawal from such embranchment) could be considered as an external force of overturn. The

⁴⁷ Although probably not without biases, the extraordinary trustee testifies dramatically in his address to the Parliamentary Committee on the Economy that he „...found a situation of complete chaos and a lack of basic standards of good corporate governance. For instance, Management Board sessions were not being held. At Agrokor there were no minutes containing an agenda or decisions made and which all Management Board Members would have voted for. This was not existent at Agrokor. All decisions were made by only one man based on his personal assessment, although this is a complex system of more than 160 companies.“ [8]

government's decision of leaving the troubled firm's accountable parties to bear the costs of failure is definitely a game changer, but since European rules apply in Croatia for quite a while, the argument sounds pretty convincing that this decision is only about unravelling the risk(s) of failure in an acceptable manner. From that perspective, regardless what some stakeholders (e.g. business owners or creditors) expect in such situations as appropriate government behavior, unfulfilled (bailout) expectations will hardly be judged as failure causes.

For insight from the voluntarist perspective, we lean on the Argenti's A score [11], [12], [13], one of the most notable qualitative models of corporate failure prediction. The A score suggests that defects and mistakes that may lead to serious troubles (i.e. management weaknesses which originate from autocratic behavior, high share of debt capital), which were present in the Agrokor Group even before 2014 (table 4).

Table 4: The A score for Agrokor in 2014

| 2014 (Year end) | Y/N | Agrokor score | Argenti score |
|--|-----|---------------|---------------|
| 1. DEFECTS | | | |
| CEO-autocrat | Y | 8 | 8 |
| Chairman of the board is CEO as well | Y | 4 | 4 |
| Board inactivity | Y | 2 | 2 |
| Internal contradictions inside the board | N | 0 | 2 |
| Weak financial director | N | 0 | 2 |
| Lack of professional middle and lower managers | N | 0 | 1 |
| Accounting system downsides: | N | 0 | |
| Absence of budget control | N | 0 | 3 |
| Absence of cash flow forecast | N | 0 | 3 |
| Absence of the system of managerial accounting of expenses | N | 0 | 3 |
| Slow reaction to changes (appearance of new products, technologies, markets, labour organization methods, etc.) | N | 0 | 15 |
| Total score | | 14 | 43 |
| 2. MISTAKES | | | |
| Too high share of debt capital | Y | 15 | 15 |
| Lack of working capital (excessively fast growth of the business) | N | 0 | 15 |
| Big project (financial sustainability) | N | 0 | 15 |
| Total score | | 15 | 45 |
| 3. SYMPTOMS | | | |
| Deterioration of financial indicators | N | 0 | 3 |
| Usage of „creative accounting“ | N | 0 | 3 |
| Non-financial signs of troubles (product quality decrease, team environment deterioration, market share decline) | N | 0 | 3 |
| Final symptoms of the crisis (legal claims, scandals, resignations) | N | 0 | 3 |
| Total score | | 0 | 12 |
| A-SCORE | | 29 | 100 |

Source: Author's work.

The acquisition of Mercator accelerated the show up of working capital shortage, another contribution to the particularly relevant mistake section of Argenti's model. Thus, the A score indicated a score of 12 or more in defects and 30 in mistakes for several years before the final collapse. In Argenti's view, failure is a sequential process towards the ultimate demise of the company, stemming primary from management defects converting into mistakes and lastly becoming visible as symptoms of failure. Out of his causes and symptoms of corporate failure, poor management (one-man rule, non-participative board of directors, unbalanced top management), defective accounting information, excessive gearing, uncomfortable financial

ratios, creative accounting and management's denial of circumstances can be observed in Agrokor's case. Furthermore, the large number of acquisitions and heavy investments in modernization and upgrades indicate that the „Big Projects“ (in which costs and time are underestimated and revenue is overestimated) could also be named.⁴⁸

5. CONCLUSION

We epitomize our conclusion into Argenti's analogy about ships and their captains: *“If a ship is in good condition and the captain is competent it is almost impossible for it to be sunk by a wave or a succession of waves. Even if there is a storm, the competent captain will have heard the weather forecast and taken whatever measures are needed. Only a freak storm for which inadequate notice has been given will sink the ship“.*⁴⁹

The condition of the ship is of course mostly the captain's responsibility and even good ships can sink due to strange storms that develop under highly unusual and unlikely circumstances. In Agrokor's case, hints that trouble was ahead were evident for some time (years). The final storm itself was obviously quite weird. Therefore, aside from internal failure causes, external factors look very appealing for deeper and further research. The role of the Croatian government seems to be particularly promising for exploration.

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⁴⁸ Conditionally though, due to hindsight bias and lack of credible historical data.

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THE EFFECT OF FINANCIAL LEVERAGE AND ITS EFFECT ON THE ENTERPRISE'S EQUITY RATE OF RETURN

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Abstract: *The question of capital structure is topical at all phases and stages of the enterprise's development. The general structure of the capital is characterized by the relative shares of own funds and borrowings in the amount of the whole capital invested by the enterprise, as well as by the ratios between the different sources of funds – equity and borrowings.*

The ratio between equity and borrowings invested in the enterprise's business shows the amount of equity that covers one Bulgarian lev of the enterprise's borrowings. In general, this is the financial autonomy ratio. The reciprocal ratio of borrowings to equity is the enterprise's debt ratio. The value of this indicator determines the amount of borrowings that covers one Bulgarian lev of equity.

The ratio between enterprise's equity and borrowings results in different amounts of profit available for the owners, as well as in different rate of return of equity. This means that the values of the enterprise's financial autonomy and debt ratios have impact on the equity rate of return. Therefore, the use of borrowings for the enterprise's business may be a factor that has positive impact on the rate of return of equity and results in its increase. This impact is related to the effect of the financial leverage.

This publication studies the effect of the financial leverage that determines the impact of funding enterprise's business with borrowings on the change of equity rate of return. The extent and the direction of this effect are influenced both by the changes in the enterprise's debt ratio, i.e. the changes in its capital structure, as well as by the dynamics of difference between the aggregate assets' rate of return and the internal interest rate.

The subject matter of this publication is to study the dynamics of equity rate of return under the influence of the direct factors describing the financial leverage effect.

The aim is to present a methodology for analysis and evaluation of industrial enterprises' equity rate of return in relation to the financial leverage effect that is theoretically justified, practically feasible and useful for the financial management.

The methodology for analysis of equity rate of return is verified by the use of business data of leading enterprises operating in the Bulgarian food canning industry.

Keywords: *Analysis, financial leverage, equity rate of return, methodology*

1. INTRODUCTION

Economic enterprises use both equity and borrowings for their business. The equity to borrowing ratio is the financial autonomy ratio that measures the amount of equity corresponding to borrowings of one Bulgarian lev. The relationship between equity and borrowings is the debt ratio measuring the amount of borrowings corresponding to equity of one Bulgarian lev of equity.

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The financial autonomy ratio and the debt ratio result in varied amounts of profit attributable to owners and to varied return of equity. This means that the value of these ratios affects the return of equity. Therefore, the use of borrowings in the enterprise's business is a factor that results in increase of the return of equity. This positive effect is relevant to the effect of the financial leverage. [1]

FINANCIAL LEVERAGE EFFECT

References [2] show a model for analysis of return of equity based on the relationship between the indicator and the return of total assets and the financial leverage effect.

This model for analysis and assessment of return of equity can be outlined with the help of the following equations:

a) Based on the equation between the asset and liability of an enterprise's balance sheet, the average amount of assets (\bar{A}) is represented as a sum of the average amounts of equity (\bar{E}) and borrowings (\bar{L}):

$$\bar{A} = \bar{E} + \bar{L} \quad (1)$$

b) Interest expenses (E^i) are calculated as a product of the average amount of borrowings and the internal interest rate ($I\%$):

$$E^i = \bar{L} \times I\% \quad (2)$$

c) Return of total assets (ROTA) is calculated as a percentage of the sum of balance sheet profit (Pf^n) and interest expenses to the average amount of enterprise's assets:

$$ROTA = \frac{Pf^n + E^i}{\bar{A}} \times 100 \quad (3)$$

Being presented in this way, return indicates the return of total assets, provided the enterprise does not charge and does not pay interest expenses for the used borrowings.

The last formula shows that the balance sheet profit may be presented in the following way:

$$Pf^n + E^i = ROTA \times \bar{A} \quad (4)$$

$$Pf^n = ROTA \times \bar{A} - E^i \quad (5)$$

The first two of the above equations are replaced in the last formula for the balance sheet profit, which results in the following formula indicating the book profit of the enterprise:

$$Pf^n = ROTA \times (\bar{E} + \bar{L}) - \bar{L} \times I\% \quad (6)$$

Return of equity (ROE) is calculated as a percentage of the balance sheet profit to the average amount of enterprise's equity, with the following formula:

$$ROE = \frac{Pf^n}{\bar{E}} \times 100 \quad (7)$$

The above formula for the balance sheet profit is replaced in the original formula for calculation of the return of equity. As a result, we have the following formula for calculation of the return of equity:

$$\begin{aligned}
 ROE &= \frac{Pf^n}{\bar{E}} \times 100 = \frac{ROTA \times (\bar{E} + \bar{L}) - \bar{L} \times I\%}{\bar{E}} = \\
 &= \frac{ROTA \times (\bar{E} + \bar{L})}{\bar{E}} - \frac{\bar{L} \times I\%}{\bar{E}} = \frac{\bar{E} \times ROTA}{\bar{E}} + \frac{\bar{L} \times ROTA}{\bar{E}} - \frac{\bar{L} \times I\%}{\bar{E}} = \\
 &= ROTA + \frac{\bar{L}}{\bar{E}} \times (ROTA - I\%) = ROTA + K^d \times (ROTA - I\%) \quad (8)
 \end{aligned}$$

This formula means that the return of equity is equal to the sum of the enterprise's return of total assets and the financial leverage effect, or:

$$ROE = ROTA + K^d \times (ROTA - I\%) \quad (9)$$

This formula contains two common factors. The first one is the return of total assets (ROTA), and the second – the effect of financial leverage (E), which is calculated with the following formula:

$$E = K^d \times (ROTA - I\%) \quad (10)$$

In the last formula, K^d is the debt ratio expressing the ratio between the enterprise's borrowings and equity. This indicator characterizing the total structure of capital is calculated with the following formula:

$$K^d = \frac{\bar{L}}{\bar{E}} \quad (11)$$

Financial leverage effect describes the influence of the enterprise's business funding with borrowings on the changes that occur in the return of equity. The power and direction of this effect depend both on the value of the debt ratio and on the value and direction of deviation between the return of total assets and the internal interest rate. If return of total assets is bigger than the internal interest rate, i.e. than the price of borrowings ($ROTA > I\%$), than the financial leverage effect is positive and the return of equity is higher than the return of total assets. However, if return of total assets is less than the internal interest rate ($ROTA < I\%$), than the financial leverage effect is negative, and the return of equity is less than the return of enterprise's total assets.

With view of the formula describing the relation among return of equity, return of total assets and financial leverage effect, three factors influence the dynamics of return of enterprise's equity.

The first factor – changes in the debt ratio, describes the change of the general structure of capital and is relevant to the enterprise's financial risk level. The increase of the debt ratio above one means that the enterprise has low capital structure where the share of equity is less than the share of borrowings. This results in increase of the financial risk. At the same time, the increase of debt ratio may result in increase of return of equity, however the financial leverage effect needs to be positive in this case. Enterprise's financial management needs to implement

measures to achieve and maintain balance between the debt ratio change rate and the difference between return of total assets and internal interest rate.

The second factor refers to the changes in the internal interest rate. The internal interest rate expresses the price of the enterprise's borrowings and varies among enterprises. This percentage is calculated as a ratio of loan interests to the average amount of all borrowings (long-term and short-term borrowings). Therefore, the value of internal interest rate is less than the loan interest rate.

The third factor refers to the changes in the return of total assets. As stated above, the return of total assets is calculated as a percentage of the sum of book profit and interest expenses to the average amount of assets. In this form the indicator describes the capitalization rate of assets, provided no interests are paid for the borrowings. This means that the enterprise carries its business by using interest-free capital only.

Analysis may go deeper to identify the reasons causing the positive or negative effect of each of those three factors on the change of return of equity for the time period in question.

RETURN OF EQUITY

As stated above, in relation to the return of total assets and the financial leverage effect, the return of equity may be expressed with the following formula:

$$ROE = ROTA + K^d \times (ROTA - I\%) \quad (12)$$

This formula shows that the following factors influence the difference in the return of equity for the current period in comparison to the previous period: changes of debt ratio; changes of internal interest rate; changes of the return of total assets.

The effect of those factors may be determined by the subsequent substitution method, which is an element of the business analysis method.

APPROBATION OF THE MODEL FOR ANALYSIS OF RETURN OF EQUITY

The model for analysis of return of equity with regard to return of total assets and financial leverage effect can be approbated on the basis of data about the business of leading companies in the canning industry in Bulgaria. The information necessary for the analysis and the assessment of return of equity is summarized in tables 1 and 2. Table 1 presents information about the average values of assets, equity and borrowings, and table 2 – about the book profit and interest expenses of the enterprises in question, and in aggregate for the group of enterprises.

Table 3 shows the calculations of values of return of total assets (formula 3), of internal interest rate (formula 2), and of return of equity (formula 7) of the enterprises and in aggregate for the group.

Table 4 summarizes the values of debt ratio (formula 11) and the difference between the return of total assets and the internal interest rate of the enterprises and in aggregate for the group.

Table 5 presents the calculations of the financial leverage effect (formula 10) and the return of equity with regard to the return of total assets and the financial leverage effect (formula 9).

Table 1: Average size (BGN'000):

| Enterprises | Assets | | | Equity | | | Borrowed capital | | |
|---------------------|--------|--------|--------|--------|--------|--------|------------------|--------|--------|
| | 2014 y | 2015 y | 2016 y | 2014 y | 2015 y | 2016 y | 2014 y | 2015 y | 2016 y |
| E1 | 19780 | 20125 | 20055 | 12857 | 11000 | 12033 | 6923 | 9125 | 8022 |
| E2 | 36950 | 36120 | 36250 | 25865 | 23478 | 23565 | 11085 | 12642 | 12685 |
| E3 | 20240 | 20760 | 20680 | 15180 | 14532 | 14476 | 5060 | 6228 | 6204 |
| E4 | 19750 | 19850 | 19780 | 11060 | 11910 | 10879 | 8690 | 7940 | 8901 |
| E5 | 2957 | 6120 | 8440 | 2070 | 4284 | 5486 | 887 | 1836 | 2954 |
| E6 | 17240 | 17240 | 17300 | 11206 | 10344 | 10380 | 6034 | 6896 | 6920 |
| E7 | 10285 | 10315 | 10360 | 5143 | 5160 | 5180 | 5142 | 5155 | 5180 |
| Total for the group | 127202 | 130530 | 132865 | 83381 | 80708 | 81999 | 43821 | 49822 | 50866 |

Table 2: (BGN'000)

| Enterprises | Balance sheet profit | | | Interest expenses | | |
|---------------------|----------------------|--------|--------|-------------------|--------|--------|
| | 2014 y | 2015 y | 2016 y | 2014 y | 2015 y | 2016 y |
| E1 | 762 | 1105 | 751 | 210 | 355 | 241 |
| E2 | 6650 | 5035 | 8390 | 388 | 506 | 504 |
| E3 | 2125 | 2830 | 1275 | 126 | 162 | 160 |
| E4 | 1420 | 1710 | 1710 | 252 | 223 | 254 |
| E5 | 165 | 645 | 1920 | 18 | 33 | 42 |
| E6 | 1810 | 2055 | 2125 | 174 | 193 | 195 |
| E7 | 360 | 435 | 572 | 135 | 134 | 135 |
| Total for the group | 13292 | 13815 | 16743 | 1303 | 1606 | 1531 |

Table 3: ROE, ROTA and I%

| Enterprises | ROE, % | | | ROTA, % | | | I % | | |
|---------------------|---------|---------|---------|---------|---------|---------|--------|--------|--------|
| | 2014 y | 2015 y | 2016 y | 2014 y | 2015 y | 2016 y | 2014 y | 2015 y | 2016 y |
| E1 | 5,9267 | 10,0455 | 6,2412 | 4,9141 | 7,2547 | 4,9464 | 3,0334 | 3,8904 | 3,0042 |
| E2 | 25,7104 | 21,4456 | 35,6036 | 19,0474 | 15,3405 | 24,5352 | 3,5002 | 4,0025 | 3,9732 |
| E3 | 13,9987 | 19,4743 | 8,8077 | 11,1215 | 14,4123 | 6,9391 | 2,4901 | 2,6012 | 2,5790 |
| E4 | 12,8391 | 14,3577 | 15,7184 | 8,4658 | 9,7380 | 9,9292 | 2,8999 | 2,8086 | 2,8536 |
| E5 | 7,9710 | 15,0560 | 34,9982 | 6,1887 | 11,0784 | 23,2464 | 2,0293 | 1,7974 | 1,4218 |
| E6 | 16,1521 | 19,8666 | 20,4721 | 11,5081 | 13,0394 | 13,4104 | 2,8837 | 2,7987 | 2,8179 |
| E7 | 6,9998 | 8,4302 | 11,0425 | 4,8128 | 5,5162 | 6,8243 | 2,6254 | 2,5994 | 2,6062 |
| Total for the group | 15,9413 | 17,1173 | 20,4185 | 11,4739 | 11,8141 | 13,7538 | 2,9735 | 3,2235 | 3,0099 |

Table 4: K^d and (ROTA – I%)

| Enterprises | K^d , BGN | | | Difference ROTA - I%) | | |
|---------------------|-------------|--------|--------|-----------------------|---------|---------|
| | 2014 y | 2015 y | 2016 y | 2014 y | 2015 y | 2016 y |
| E1 | 0,5385 | 0,8295 | 0,6667 | 1,8807 | 3,3642 | 1,9422 |
| E2 | 0,4286 | 0,5385 | 0,5383 | 15,5471 | 11,3380 | 20,5620 |
| E3 | 0,3333 | 0,4286 | 0,4286 | 8,6314 | 11,8112 | 4,3601 |
| E4 | 0,7857 | 0,6667 | 0,8182 | 5,5659 | 6,9295 | 7,0756 |
| E5 | 0,4285 | 0,4286 | 0,5385 | 4,1594 | 9,2810 | 21,8246 |
| E6 | 0,5385 | 0,6667 | 0,6667 | 8,6245 | 10,2407 | 10,5925 |
| E7 | 0,9998 | 0,9990 | 1,0000 | 2,1874 | 2,9168 | 4,2181 |
| Total for the group | 0,5256 | 0,6173 | 0,6203 | 8,5004 | 8,5907 | 10,7439 |

Table 5: Effect of financial leverage and ROE

| Enterprises | Effect of financial leverage, % | | | ROE, % | | |
|---------------------|---------------------------------|--------|---------|---------|---------|---------|
| | 2014 y | 2015 y | 2016 y | 2014 y | 2015 y | 2016 y |
| E1 | 1,0127 | 2,7908 | 1,2948 | 5,9267 | 10,0455 | 6,2412 |
| E2 | 6,6631 | 6,1051 | 11,0685 | 25,7104 | 21,4456 | 35,6036 |
| E3 | 2,8771 | 5,0619 | 1,8686 | 13,9987 | 19,4743 | 8,8077 |
| E4 | 4,3732 | 4,6196 | 5,7891 | 12,8391 | 14,3577 | 15,7184 |
| E5 | 1,7823 | 3,9776 | 11,7517 | 7,9710 | 15,0560 | 34,9982 |
| E6 | 4,6439 | 6,8271 | 7,0617 | 16,1521 | 19,8666 | 20,4721 |
| E7 | 2,1870 | 2,9140 | 4,2181 | 6,9998 | 8,4302 | 11,0425 |
| Total for the group | 4,4674 | 5,3031 | 6,6647 | 15,9413 | 17,1173 | 20,4185 |

The data in tables 3 and 5 shows that during the three-years' period being subject to analysis, the return of equity of all enterprises and in aggregate for the group of enterprises, calculated in accordance with formula 7 and formula 9, has equal values. This means that the determined model for analysis and assessment of return of equity with regard to the return of total assets and the financial leverage effect is theoretically correct and applicable in business practice.

Table 6 describes the influence of the direct factors on the change of return of equity of the enterprises for 2015 in comparison to 2014.

The data in table 6 show that the return of equity of Agri Bulgaria EOOD (E1) has increased under the effect of the changes of the debt ratio by 0,5474, as well as under the effect of the change of the return of total assets by 4,2822 points, and has decreased under the effect of the changes of the internal interest rate by 0,7110 points. We can see that in Agri Bulgaria EOOD the debt ratio for 2015 has increased by BGN 0,291 in comparison to 2014 (0,8295 - 0,5385), i.e. BGN 0,291 of more borrowings are attributable to every one Bulgarian lev of equity. At the same time, the internal interest rate describing the price of borrowings in its nature has increased by 0,857 points (3,8904 - 3,0334), which also causes the decrease of the return of equity. The general effect of these two factors (changes of debt ratio and changes of internal interest rate) has caused the decrease of return of equity by 0,1636 points [(+0,5474) + (- 0,7110)].

Table 6: Influence of factors

| Enterprises | Influence of factors | | | Total influence of factors |
|---------------------|---------------------------|---------------------------------------|---------------------------------------|----------------------------|
| | changes in the debt ratio | changes in the internal interest rate | changes in the return of total assets | |
| E1 | 0,5474 | -0,7110 | 4,2822 | 4,1187 |
| E2 | 1,7085 | -0,2705 | -5,7028 | -4,2648 |
| E3 | 0,8220 | -0,0476 | 4,7011 | 5,4756 |
| E4 | -0,6626 | 0,0609 | 2,1204 | 1,5186 |
| E5 | 0,0003 | 0,0994 | 6,9853 | 7,0850 |
| E6 | 1,1057 | 0,0566 | 2,5522 | 3,7145 |
| E7 | -0,0017 | 0,0260 | 1,4061 | 1,4304 |
| Total for the group | 0,7800 | -0,1543 | 0,5503 | 1,1760 |

The changes of the debt ratio have caused decrease of the rate of return for 2015 in comparison to 2014, in Deroni OOD (E4) by 0,6626 points, and in Fructo Sliven AD (E7) – by 0,0017 points. In all other enterprises, the effect of this factor is positive. This factor has strongest positive effect in the enterprises Kuminyano Fruit OOD (E2) – an increase by 1,7085 points, Viktoria Nuts EOOD (E6) – an increase by 1,1057 points, Olineza Premium OOD (E3) – an increase by 0,8220 points, and Agri Bulgaria EOOD (E1) – an increase of the return of capital by 0,5474 points.

The changes of the internal rate of return have negative impact on the change of return of equity in the following enterprises: Agri Bulgaria EOOD (decrease by 0,7110 points); Kuminyano Fruit OOD (decrease by 0,2705 points) and Olineza Premium OOD (decrease by 0,0476 points). The negative effect of changes of the internal interest rate in these enterprises also influences the general negative effect of the factor on the value of return of equity in general for the entire group of enterprises. Changes of the internal interest rate have positive effect on the change of return of equity in the rest of the enterprises within the group, however it cannot compensate the negative effect of the factor in the first three enterprises.

Only in Kuminyano Fruit OOD, the changes of return of total assets have significantly negative effect on the change of the return of equity for 2015 in comparison to 2014. In all other enterprises within the group, as well as for the group in general, the impact of the factor is positive, and the most positive effect is demonstrated in the enterprise Filicon – 97 AD (increase by 6,9853 points).

Table 7 shows the influence of direct factors on the change of the enterprises' return of equity of for 2016 in comparison to 2015.

Table 7: Influence of factors

| Enterprises | Influence of factors | | | Total influence of factors |
|---------------------|---------------------------|---------------------------------------|---------------------------------------|----------------------------|
| | changes in the debt ratio | changes in the internal interest rate | changes in the return of total assets | |
| E1 | -0,5480 | 0,5908 | -3,8471 | -3,8043 |
| E2 | -0,0019 | 0,0158 | 14,1441 | 14,1580 |
| E3 | 0,0000 | 0,0095 | -10,6761 | -10,6666 |
| E4 | 1,0499 | -0,0369 | 0,3476 | 1,3607 |
| E5 | 1,0199 | 0,2022 | 18,7200 | 19,9422 |
| E6 | 0,0000 | -0,0128 | 0,6183 | 0,6055 |
| E7 | 0,0028 | -0,0068 | 2,6162 | 2,6122 |
| Total for the group | 0,0259 | 0,1325 | 3,1429 | 3,3013 |

The data in table 7 show that the changes of the debt ratio result in decrease of the return of equity in the following enterprises: Agri Bulgaria EOOD by 0,5480 points, and Kuminyano Fruit OOD – by 0,0019 points. In the rest of the enterprises, the factor has had positive effect, which is strongest in the following enterprises: Deroni OOD (increase by 1,0499 points) and Filicon – 97 AD (increase by 1,0199 points).

Changes of the internal interest rate have had negative effect on the dynamics of the return of equity in the following enterprises: Deroni OOD (decrease by 0,0369 points), Viktoria Nuts EOOD (decrease by 0,0128 points) and Fructo Sliven AD (decrease by 0,0068 points). In all other enterprises, the factor has had positive effect, the strongest one being in Agri Bulgaria EOOD (increase by 0,5908 points) and Filicon – 97 AD (increase by 0,2022 points).

Changes of return of total assets have negative effect on the occurred changes of the return of equity for 2016 in comparison to 2015 in the following enterprises: Agri Bulgaria EOOD (decrease by 3,8471 points) and Olineza Premium OOD (decrease by 10,6761 points). We can highlight the negative effect of the factor in Olineza Premium OOD, which is due to the significant decrease of the return of total assets by 7,4732 points (6,9391 – 14,4123). If we compare the values of return of total assets for 2015 and for 2014, we can see that such return has increased by 3,2908 points (14,4123 – 11,1215).

In the rest of the enterprises, changes of return of total assets have had positive effect on the dynamics of return of equity. Strongest effect is observed in the following enterprises: Filicon – 97 AD (increase by 18,72 points) and Kuminyano Fruit OOD (increase by 14,1441 points).

Data in table 5 show that the financial leverage effect in all enterprises during each year within the three-years' period in question is positive. This means that the return of equity is bigger than the return of total assets of the enterprises. This conclusion is further verified by the data in table 8.

Table 8: ROE, ROTA and differences ROE and ROTA

| Enterprises | ROE, % | | | ROTA, % | | | Differences between ROE and ROTA, % | | |
|---------------------|--------|--------|--------|---------|--------|--------|-------------------------------------|--------|--------|
| | 2014 y | 2015 y | 2016 y | 2014 y | 2015 y | 2016 y | 2014 y | 2015 y | 2016 y |
| E1 | 5,927 | 10,045 | 6,241 | 4,914 | 7,254 | 4,946 | 1,012 | 2,790 | 1,294 |
| E2 | 25,710 | 21,445 | 35,603 | 19,047 | 15,340 | 24,535 | 6,663 | 6,105 | 11,068 |
| E3 | 13,998 | 19,474 | 8,808 | 11,121 | 14,412 | 6,939 | 2,877 | 5,061 | 1,868 |
| E4 | 12,839 | 14,357 | 15,718 | 8,465 | 9,738 | 9,929 | 4,373 | 4,619 | 5,789 |
| E5 | 7,9710 | 15,056 | 34,998 | 6,188 | 11,078 | 23,246 | 1,782 | 3,977 | 11,751 |
| E6 | 16,152 | 19,866 | 20,472 | 11,508 | 13,039 | 13,410 | 4,643 | 6,827 | 7,061 |
| E7 | 6,999 | 8,430 | 11,042 | 4,812 | 5,516 | 6,824 | 2,187 | 2,914 | 4,218 |
| Total for the group | 15,941 | 17,117 | 20,418 | 11,473 | 11,814 | 13,753 | 4,467 | 5,303 | 6,664 |

Based on the data in the last table we can make the respective conclusions about the differences between the return of equity and the return of total assets in the individual enterprises. In 2014 the biggest difference is seen in the second enterprise, Kuminyano Fruit OOD, followed by the sixth enterprise, Viktoria Nuts EOOD, and the smallest difference is seen in the enterprise Agri Bulgaria EOOD.

With regard to 2015, the biggest difference is seen in the sixth enterprise, Viktoria Nuts EOOD, followed by the second enterprise Kuminyano Fruit OOD. The smallest difference is observed in the first enterprise Agri Bulgaria EOOD again.

During 2016 the biggest difference is observed in the fifth enterprise, Filicon – 97 AD, followed by the second enterprise, Kuminyano Fruit OOD, whereas the smallest difference is also seen in the first enterprise, Agri Bulgaria EOOD.

We can see that the values of differences between the return of equity and the return of total assets in different enterprises during each of the years within the three-years' period in question vary significantly. Furthermore, the enterprise Agri Bulgaria EOOD is characterized with the smallest differences during all of the three years.

Based on the dependence among the return of equity, the return of total assets and the financial leverage effect, we can make the conclusion that namely the difference between the return of equity and the return of total assets expresses, in its nature, the financial leverage effect. This conclusion is verified by the calculations made in table 5 (for the financial leverage effect) and in table 8 (for the difference between the return of equity and the return of total assets of enterprises).

CONCLUSION

The main source of information for the analysis is accounting. „It is of exceptional importance to organize accountancy in such a way that it would satisfy to the highest degree the requirements set by the analysis, and the provided information should offer an opportunity for its detailed working out in specific directions and sections“. [3]

The resultative information is useful for the industrial enterprises' management to consider and make effective management decisions for the purposes of improving the efficiency of the business in operating and strategic aspect. This is an objective prerequisite for the successful development of the enterprises, the increase of their competitive power and their good position on a dynamic market.

The usefulness of the resultative analytical information confirms the significance of the management function *Analysis* within the governance system of every enterprise. The information needs of the management may have opposite effect with regard to expansion, building-up and improvement of the methodology for analysis and assessment of the enterprises' return of equity. This is further verified by the identification of the power and direction of the direct factors' impact on the dynamics of the return of equity with regard to the return of total assets and the financial leverage effect. Enterprise's management pays attention to different problems that need to find their theoretical solutions.

The methodology for analysis of the return of equity allows to identify and systemize the weaknesses and strengths with regard to the enterprises' business funding and the effectiveness of the use of their assets and capital, on the basis of which specific measures and actions for improvement of the business efficiency may be developed and proposed.

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SHOULD PRODUCTION FUNCTION WIN OVER THE THEORY OF OPTIMUM CURRENCY AREA?

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Abstract: *The EU and EMU experience have in last years exposed several problems and limitations of these international institutions. Correspondingly, we are faced with uncritical positions of economists stressing that not before too long the EMU and EU will cease to exist and that it is no use to spend energy for reforms. In this paper, those extreme views will be evaluated through two economic theories/models: Mundell's optimum currency area theory (OCA) and production function including technological progress. Focusing on two prepositions of the OCA theory it can be judged, that the EMU was nothing more than a project with political and security background and will probably depend on member states' interest for such international integration. On the other hand, applying of the production function will show that with globalization, which despite modern trends in international trade policies will be hard to stop, the size matters. From the point of EU with scarce factor labor, their competition with fast growing Asian economies with abundant labor force should be of the major concern. In this respect, none of biggest and strongest economies in Europe cannot expect to become anything else than prey when appearing individually in international context.*

Keywords: *production function, theory, currency area*

1. INTRODUCTION

On 1st of January of 2019 the Euro has celebrated 20 years since it was introduced in 11 EU countries. The arrangement, which is second to nothing in economic history, started as a virtual currency in Austria, Belgium, Finland, France, Germany, Ireland, Luxembourg, Netherlands, Portugal and Spain to become a real currency in 1st January 2002. After later enlargements the Euro currency is now legal tender in 19-member countries of the EU thus covering a 350 million population market. Additionally, but in a unilateral way the Euro has been used also in Montenegro and Kosovo.

Leading and managing the Economic and Monetary Union the ECB and its bodies celebrated the Euro birth anniversary.

2. DEVELOPMENTS AND PROBLEMS

It was immediately clear that with the EMU only one part of classical policy-mix would be covered thus being prone to instabilities caused by the second part – the fiscal stance. In order to minimize the risk from the side of economic policy, which was to remain under control of national governments, the Maastricht Agreement (1992/1993) includes five convergence criteria that should be complied with by EMU member countries. Being teased even by strongest EU economies, these criteria could not assure the streamlined growth and

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development of the EMU⁵². The not so positive experience with the union will be discussed in the next chapter on Optimum Currency Area. We will mirror the discussion in the media addressing the anniversary of the Euro. Here the advocates of the EMU face quite a strong opposition. The parties participating in public discourse could be divided in three groups.

As the first one the proponents and advocates of the EMU can be considered. Although they could be divided in more two groups (administrative personnel of the Euro System and economists and public discourse participants with broader horizon) they all are stressing positive experience with the Euro and are linking it to the European interest for peaceful coexistence. At his speech in Pisa on December 2018 Mario Draghi stressed the benefits that were brought to the EMU members although not all of them could participate with positive developments. Those threatened to be left behind should be helped with reforms, while politicians are responsible for structural reforms. In economic sense it means European bank union with common deposit guarantee as well as single capital market.

As the second group, critical scientists and top economists could be considered. They consistently base their criticism on examples, which especially since 2008 financial and economic crisis built certain negative experiences with the EMU. Theoretically, their best basis seems to be the Theory of Optimum Currency Area. Here we believe in a sense relevant and representative is the criticism by Mody (2018), especially in the sense of his policy suggestion. According to his proposal the ECB should act as US Federal reserve, meaning that it should widen its goals to the field of economic growth and employment. This however does not comply with the legacy of the Deutschmark that forms the basis for the Euro and the EMU, but could help comforting the problematic national economies in the time of their critical economic developments.

The third group consists of critics who are functioning over (mostly yellow) media and social media. They profit from the fact that (coming) EU elections will offset the share of population, which is nurturing their knowledge from FB and reality shows. To follow such media surely is a personal decision, but as electoral body, these structures of population prefer interesting and direct speech to (scientific) arguments. No matter the reality they are supporting promises of swift political action, which will address their daily problems as they see them as well as the sources of these problems. They seemingly do not understand, that the political correctness aims at respect for possible different (political) positions and people. We must however, beware the fact that this part of electoral body is rather short-sighted but still calculating opportunity costs caused by arrogant and ignorant behavior of top politicians. We use the term short-sighted as they are only slowly realizing, that interesting news and alternative facts not before too long are taking hostages them too.

Triggered by the change of political map in the USA and in the EU the proponents of “dissolving” of the EMU come from three subgroups of participants of public discourse. First are the politicians trying to comfort the disoriented electoral body. Mostly they are nurturing their positions by the facts deriving from difficult economic positions of their home countries. If there would be disintegration of the EMU, they can of course reckon on favorable position in the political markets. The common denominator of their positions is that others (EMU, Germany, globalization) should be made responsible for their country’s problems. The second group influencing negative perception of the EMU are Brexiters. The basis of their criticism comes from the fact that the UK has in last 100 years constantly been losing the world primacy.

⁵² Anectotically in 1995 Croatia and Albania fulfilled more Maastricht convergence criteria than Italy, today's EMU patient.

With their public activity at the opportunity of 20 years celebration and usually based on speculations (see: Evans-Pritchard 2019, Halligan 2018, Hosso 2018, Lynn 2019, Warner 2019), they also try to comfort their voters who followed them at the 2016 referendum and won (but also thanks to arrogant position of majority of voters, who did not appear at the referendum). As already mentioned, their style is strictly oriented towards population, which likes strong views, knows less about facts and are prone to consider alternative facts.

The third subgroup represent leaders of ruling parties in some EU transition countries. Their endeavor and “historical” longing for inclusion in the EU story has dissolved on the rocks of immigrant issue. Their nationalist governments soon demonstrated that they do not really understand European values that drove them in the time of accession. According to their temporary political taste, the EMU would involve them too much in a community, with which they are ready to share only “fruits” of positive developments.

The idea of this article is to theoretically confront the EMU criticism. We believe, that when put into broader historical and geostrategic perspective several reasons for endeavors to preserve the EMU can be found. We would like to strengthen this view by facing the arguments of the Theory of Optimum Currency Area with production function.

3. OPTIMUM CURRENCY AREA THEORY

Discussion on optimum currency area starts with Mundell (1961). According to the initial positions of the theory the areas defining feasibility of currency union stretch from mobility of labor and capital, price and wage flexibility, openness of the region to foreign competition, diversification of production and consumption. Later the similar reaction to outside economic shocks was added. For our discussion especially relevant is contribution by Mongelli (2002, 2008). If compared with “early OCA theory” so called “new OCA theory has moved the views more in favor of monetary unions. According to the author, there is still no consistent OCA test at our disposal, although the first ten years’ experience could be judged as positive. There were no rising inflation differentials, real interest channels did not generate asymmetric monetary transmissions, pro-cyclical fiscal policies seemed to be under control and changes in competitiveness within the EMU was developing in a sustainable way.

No matter how one treats the OCA theory it is the fact, that the data on economic developments support the criticism referring to the mismatch between expectations and real consequences. No matter that most of problems can be related to the 2008 financial and economic crisis it seems that from very beginning all of the homework has not been done. So, the belief that the promising Maastricht fiscal criteria would be operable was obviously too optimistic. Soon it namely proved that some EMU countries simply were too big to fail (Italy) and even Germany drove in to the waters of excessive public debt over 60% of GDP. The problem is not only statistical though – the belief in the fiscal criteria prevented the emergence of (now desperately needed) settlement mechanism, which despite big problems with Greece and approaching ones with Italy still could not be institutionally put in practice.

Following the fact that among the EMU member states similarities were quite weak and that they have not really progressed, one could easily state, that the OCA theory should beware us from optimistic expectations of the EMU sustainability.

4. PRODUCTION FUNCTION

Production function is a tool, which helps students understand the role of factors of production in shaping economic growth of a country. Its typical form is:

$$Q = F(L, K);$$

Where Q represents quantity of production, L represents labor and K represents capital. As we are discussing the BDP, more appropriate denomination of the production will be Y for income. The (quantity of) production is developing also in the course of time, here incorporating the technology development and denominated by A . It is also the fact, that the existing factors of production will influence the production according to the degree of convergence of an economy. Since we will compare not only national states but also EU integration it makes sense, that we interpret the convergence with the level of integration: the highest the level of integration. We will denominate it with E . So, the form of our adjusted production function will be as follows: $Y = F(L, K, A, E)$;

For further analysis, we will in a heuristic manner evaluate the disposability of factors of production for four entities relevant for our article. These are: USA, China, India and EU. The assigned values will stretch from 0 (nonexistent) to 10 (fully disposable) and will be added for the chosen entities. The so created production functions will be:

| Entity | L | K | A | E | Y |
|--------------|-----|-----|-----|-----|-----------|
| USA | 6 | 10 | 10 | 10 | 36 |
| China | 10 | 10 | 7 | 10 | 37 |
| EU | 6 | 10 | 9 | 6 | 31 |
| India | 8 | 10 | 6 | 3 | 27 |

The above application of the adjusted production function could give us some ground to evaluate the prospective of different entities. Both China and India dispose over abundant human capital – however with an important difference: traditional Indian society prevents significant part of population to participate in education and so we had with this factor of production to combine Indian huge population with their low inclusion in production. We presupposed that all of entities have equal access to capital. With the technology development, we considered that the USA is leading the EU. Although China has made significant improvement in last decades, we still considered considerable existing regional differences in this country. From the reason mentioned above, we have evaluated India with lower value, despite this country's participation in some top technological projects. With integration E we put on the top USA and China being rather traditional (national) states. EU has only been emerging "state" with only weak elements of integration⁵³. India has been often cited (Sharma 2011) as the country, which still has to develop some basic co-operation with its constituting states.

One could of course assign different values from those that we presented above. However, there would still be the differences pointing at the same comparative relations. For our discussion relevant is the position of the EU from which possible policy recommendations could be derived. There is no way for the EU or to the USA to close the population gap with China or India. Despite some signs that in a trade war the opponent could be deprived of access to capital,

⁵³ When explaining The »new OCA theory« Mongelli (2002, 18 - 26) quotes essential differences between USA and EU in the fields off all dealing with intergartion level.

this counter globalization measure cannot have any effect. So, the capital will also in the future be fully accessible to all compared entities. From the point of the EU and even more from the point of China and India it is impossible to catch with the USA in the field of technology development. Although EU and especially China are doing their best with building of institutions to support technology development, there are American core values and labor ethics that will keep this gap open. So, the only policy to which the EU should be focused in order to improve its chances on the global level is deepening of integration.

In this respect, calls for reinstalling national sovereignty in Europe are pure nonsense. Even the biggest EU (and fifth world) German economy would be an easy victim of predatory policies of much bigger and strongest entities. Here it is no use to talk countries like Poland, Hungary or even Slovenia, whose comparative global importance hardly exceeds the size of statistical failure.

5. CONCLUDING REMARKS

The author believes that the EMU project is simply too important and has already achieved so many positive external effects that its abandonment would bring unforeseeable negative consequences. Apart from this, we hope, that the article proved, that besides OCA theory, which by all means proved relevant also in the case of the EMU also other economic models should be considered when judging the union relevance. Here the need of preserving the EMU could be demonstrated through the use of adjusted production function in open (global) economic area. We believe that both models proved their relevance with slight difference. The OCA theory warns over unavoidable consequences when not considered or acted towards fixing of misalignments, but still offers maneuvering space for action – here meaning especially political actions to form the above discussed institutional frame as well as agreement on solidarity – bail out. On the other hand, the facts connected with the production function are outside higher degree of integration, are out of control of the EU member states and also out of control of the EU. To avoid negative consequences for the EU individual member countries as well as for the EU as international integration, the energy should be put in achieving deeper integration. Here we find appropriate the position of Serbian writer Vuk Drašković as expressed in one of his interviews on the TV: “Regarding participation in the integration processes we have the choice: we will be at the table, or we will be on the menu”.

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PRIMENA LEAN KONCEPTA POSLOVANJA U FUNKCIJI EFIKASNIJEG OBAVLJANJA POSLOVNIH PROCESA U BANKAMA

APPLICATION OF LEAN BUSINESS CONCEPT IN THE FUNCTION OF EFFICIENT BUSINESS PROCESS MANAGEMENT IN BANKS

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Sadržaj: *Izmenjeni uslovi u poslovanju preduzeća, rukovođeni pre svega opštom digitalizacijom poslovanja, nametnuli su potrebu uvođenja savremenih menadžment alata. Lean koncept je među njima zauzeo posebno mesto. Iako najpre primenjen u proizvodnji, rastući značaj uslužnog sektora nametnuo je potrebu njegove primene i u sektoru usluga. Imajući u vidu rastuću konkurenciju na tržištu finansijskih usluga i značajnu regulisanost banaka, rad ima za cilj da sagleda mogućnosti i specifičnosti primene lean koncepta u bankama i srodnim finansijskim institucijama.*

Ključne reči: *lean koncept, uslužni sektor, banke*

Abstract: *The changed conditions in the company's operations, driven primarily by the general digitization of business, imposed the need to introduce modern management tools. Lean concept has taken a special place among them. Although first applied in production, the growing importance of the service sector imposed the need for its application in the service sector. Taking into account the growing competition in the financial services market and significant regulation of banks, the paper aims to examine the possibilities and specifics of the application of lean concepts in banks and similar financial institutions.*

Keywords: *lean concept, service sector, banks*

1. UVOD

Savremena preduzeća koja teže da isporuče zahtevanu vrednost za potrošače uz traganje za perfekcijom primenjuju, između ostalih lean koncept poslovanja. Lean koncept poslovanja podrazumeva eliminisanje svih oblika gubitaka iz poslovnih procesa kako bi potrošač dobio zahtevanu vrednost. Cilj je uspostaviti kontinuirani tok poslovanja bez prekida i zastoja kako bi troškovi poslovanja bili niži. Lean koncept poslovanja se razvijao i danas predstavlja vodeću paradigmu poslovanja modernih preduzeća. Ovaj koncept podrazumeva filozofiju i kulturu poslovanja kojom se eliminišu svi oblici gubitka iz poslovnih tokova preduzeća sa ciljem skraćivanja vremena koje protekne od poručivanja proizvoda do njegove isporuke. Ovo je moguće postići obavljanjem aktivnosti koje dodaju vrednosti na najbolji mogući način, konstantnim unapređenjem poslovnih procesa i usavršavanjem zaposlenih. Iako inicijalno primenjen u oblasti proizvodnje, ubrzo se javila potreba za njegovom primenom i u

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sektoru usluga i uslužnim departmantima proizvodnih preduzeća. Imajući u vidu značajnu regulisanost banaka, izmenjene zahteve klijenata i sve intenzivniju konkurenciju nebankarskih, ali i nefinansijskih institucija, rad ima za cilj da sagleda specifičnosti primene lean koncepta poslovanja u bankama u funkciji efikasnijeg obavljanja njihovih poslovnih aktivnosti.

2. RAZVOJ I SPECIFIČNOSTI LEAN KONCEPTA POSLOVANJA

Kolevka nastanka lean koncepta jeste japanska kompanija Tojota (Toyota). Kompaniju Tojota osnovao je Sakichi Toyoda još 1918. godine. Svoju prvu tržišnu utakmicu kompanija Tojota dobija 1926. godine, pokretanjem proizvodnje razboja koji su prestajali sa radom onog momenta kada detektuju popucale niti. Na taj način sprečavana je proizvodnja lošeg kvaliteta. Kasnije je nakon jednogodišnjeg boravka u Americi, sin osnivača kompanije Tojota, *Kiichiro Toyoda* Fordove ideje primenio na proizvodnju manjeg obima [1]. On je uspostavio koordinaciju kretanja sirovina kroz preduzeće i pouzdanu mrežu dobavljača, čime je postavio temelj proizvodnje "tačno na vreme" (*Just in time*). Naime, on je smatrao da je najbolji način da se proizvedu dobri automobili da svi delovi i komponente koje treba ugraditi budu razvrstani u linije prema vremenu i mestu njihove montaže [9].

Doprinos poboljšanju proizvodnje primenom jednostavne i fleksibilne opreme koju su primenili naslednici osnivača kompanije Tojota bila je značajna. Međutim, ključni doprinos daljem razvoju Tojotinog proizvodnog sistema (*Toyota Production System - TPS*) ili *lean* proizvodnji dao je *Taiichi Ohno*. Analizirajući zapadne proizvodne sisteme on je došao do zaključka da oni imaju dva osnovna nedostatka [5, p. 422]. Prvi nedostatak odnosio se na postojanje velikih količina zaliha. Stvaranje velike količine zaliha rezultat je proizvodnje velikih serija koje troše kapital i nepotrebno zauzimaju skladišni prostor. Drugi nedostatak zapadnog proizvodnog sistema jeste nemogućnost da se zadovolje raznovrsne želje potrošača.

Fokus Tojotinog proizvodnog sistema bio je na skraćivanju toka proizvodnje i suvišnih aktivnosti i otpada kako bi se obezbedio kontinuirani tok proizvodnje komad po komad. Upravo ova konstatacija činila je srce Tojotinog poslovnog sistema (TPS) i u isto vreme osnovnu razliku u odnosu na tradicionalni sistem proizvodnje. U Tojoti su uvideli da se visok kvalitet proizvoda, niski troškovi i isporuka na vreme mogu istovremeno postići, ukoliko se skрати tok proizvodnje i eliminišu gubici u njemu. Polaznu osnovu za izgradnju Tojotinog proizvodnog sistema čine prevencija defekta na mestu nastanka, koju je uveo sam osnivač ove kompanije i proizvodnja "tačno na vreme" uvedena od strane sina osnivača.

Usmerenost na eliminisanje gubitaka i čekanja u proizvodnom procesu bila je neophodna, pre svega jer je uočeno da se samo 10% radnog vremena zaista odnosi na proces obrade proizvoda, dok je ostatak vremena utrošen za pripremu radnog mesta, alata i čekanja da predmet stigne na mesto obrade. Nakon Drugog svetskog rata fokus je bio na proizvodnji visoko kvalitetnih proizvoda, dok je kasnije pažnja usmerena na proizvodnju tačno određene količine proizvoda. Možemo zaključiti da je Tojotin proizvodni sistem, sistem proizvodnje koji direktno kontroliše količinu i kvalitet proizvoda sa ciljem redukovanja troškova preko eliminisanja otpada [15, p.10].

Ne može se tačno reći koji je prvi dokument u kome je objašnjena proizvodna filozofija kompanije Tojota, ali se sa sigurnošću može reći da je prvi izvor informacija na engleskom jeziku knjiga Sugimori-a pod nazivom „*Toyota Production System and Kanban System Materialization of Just in time and Respect-for-Human System*“ objavljena 1977. godine [5]. Međutim, tek kasnije su akademska javnost i menadžeri proizvodnje usmerili pažnju na suštinu

Tojotinog proizvodnog sistema. Dalja popularizacija lean proizvodnje događa se 1990. godine kada je publikovana knjiga „*The Machine that Changed the World*“ trojice autora *Womack, Jones i Roos*.

Lean koncept obuhvata filozofiju, kulturu i principe poslovanja usađene u ponašanje zaposlenih kojim se obezbeđuje otklanjanje svih oblika gubitaka i prepreka u tokovima materijala i informacija u cilju unapređenja poslovnih procesa i isporuke zahtevane vrednosti potrošaču. Kao takav, usmeren je na edukaciju i osposobljavanje zaposlenih, s jedne strane, i obezbeđivanje što veće vrednosti za potrošače, s druge strane. Ukoliko se lean koncept poslovanja adekvatno implementira mogućnosti unapređenja poslovanja biće višestruke. Naime, smanjivanjem grešaka i bržim obavljanjem aktivnosti moguće je povećati efektivnost, efikasnost i kvalitet poslovnih procesa. Efikasniji procesi vode snižavanju operativnih troškova. Brzim i nesmetanim obavljanjem aktivnosti proizvodi i usluge se potrošačima dostavljaju u trenutku kada su im potrebni, što dovodi do veće satisfakcije potrošača. Lean koncept motivira zaposlene da bolje obavljaju aktivnosti, jer ih najbolje poznaju i mogu ih najbolje unaprediti. Na ovaj način dolazi do povećanja zadovoljstva zaposlenih. Najzad, primena lean tehnika i praksi omogućava stvaranje slobodnih mašinskih i radnih kapaciteta. Slobodne mašine i radnici se mogu iskoristiti za obavljanje nekih drugih aktivnosti koje dodaju vrednost.

Lean koncept poslovanja podrazumeva mnogo više od prostog eliminisanja gubitaka i aktivnosti koje ne dodaju vrednost. Ceo “tok vrednosti” mora biti integrisan i organizovan na osnovu lean principa, kako bi se obezbedilo da proizvod prođe kroz sve operacije i procese neophodne da se isporuči zahtevana vrednost. Lean konceptom poslovanja teži se da se sa što efikasnijim obavljanjem poslovnih procesa zadovolje potrebe potrošača i ostvare strateški ciljevi preduzeća.

Lean koncept usmeren je na svakodnevna inkrementalna poboljšanja. Zagovornici lean koncepta smatraju da je bolje unaprediti poslovanje preduzeća odmah za 10%, nego čekati trenutak kada se poslovanje može stopostotno unaprediti. Čekanje da dođe trenutak kada se poslovanje može u potpunosti unaprediti zahteva dosta vremena, a uslovi na tržištu se nemilosrdno menjaju pa na taj način preduzeće može da zakasni sa reakcijama na tražnju i time izgubi trku sa konkurencijom.

Primena lean proizvodnje dovela je do brojnih poboljšanja kako operativnih tako i strateških performansi preduzeća, pa su se osnovni postulati počeli primenjivati i na druge delove preduzeća. Na taj način nastao je lean koncept koji je od pristupa za poboljšanje operativne efikasnosti postao sveobuhvatna strategija preduzeća. Da bi primena lean koncepta poslovanja dala dugoročne efekte, promene koje se uvode u preduzeće moraju obuhvatiti organizacionu strukturu, poslovnu kulturu i sistem izveštavanja o performansama. Ovo ne znači napuštanje postojeće organizacione strukture, poslovne kulture i sistema izveštavanja, već njihovo kontinuirano unapređenje, jer zatečena organizacija, kultura i izveštavanje ukazuju na prednosti, nedostatke, potencijalne probleme u poslovanju i mesta na kojima je potrebno primeniti neku od lean tehnika i praksi.

Lean koncept poslovanja nije univerzalan i ne može se primeniti u svakom preduzeću na isti način. Rastući značaj uslužnog sektora, a posebno banaka i srodnih finansijskih institucija opredelio nas je da u radu sagledamo specifičnosti primene lean koncepta u njima.

2. PRIMENA LEAN KONCEPTA POSLOVANJA U USLUŽNOM SEKTORU

U [4] analizirana je primena lean koncepta u uslužnom sektoru, uvidom u radove koji se bave ovom problematikom, a koji su objavljeni u periodu od 1998 do 2014. godine. Na uzorku od 122 radova, autorke su pokušale da uoče određene pravilnosti u razvoju lean koncepta u sektoru usluga, kao i specifičnosti ove primene. Za te potrebe literatura koja se bavi primenom lean koncepta u sektoru usluga klasifikovana je u četiri perioda (tabela 1).

Tabela 1. Kategorizacija primene lean koncepta u sektoru usluga sa stanovišta vremenskog kriterijuma, [4].

| Faze u primeni lean koncepta u sektoru usluga | Period primene |
|--|----------------|
| Period pre primene lean koncepta | do 1998. |
| Jačanje svesti o značaju lean koncepta | 1998.-2003. |
| Period sagledavanja koristi od primene lean koncepta | 2004.-2008. |
| Period primene lean koncepta | 2009.-2014. |

Prva faza primene lean koncepta u sektoru usluga zasnivala se na direktnoj primeni principa iz proizvodnje, bez njihovog prilagođavanja sektoru usluga. Intenzivan razvoj tercijarnog sektora 70-ih godina prošlog veka, nametnuo je potrebu razlikovanja proizvoda od usluga, a time i drugačiju primenu lean koncepta u uslužnom sektoru. Prilagođenost lean koncepta specifičnostima uslužnog sektora uticala je na njegovu intenzivnu primenu posle 2004. godine, i to posebno u zdravstvu, IT sektoru, finansijskom sektoru, obrazovanju i javnom sektoru (Tabela 2).

Tabela 2. Primena lean koncepta u sektoru usluga, prilagođeno prema [4].

| Period primene | Zdravstvo | IT sektor | Finansijski sektor | Obrazovanje | Javni sektor |
|----------------|-----------|-----------|--------------------|-------------|--------------|
| 1998-2003 | 1 | 2 | 1 | 1 | 0 |
| 2004-2008 | 6 | 2 | 4 | 3 | 2 |
| 2009-2014 | 27 | 17 | 2 | 3 | 5 |

Iz tabele se jasno uočava da zdravstvo i IT sektor prednjače u primeni lean koncepta poslovanja, posebno nakon 2009. godine. Ovo međutim ne znači da ove grane uslužnog sektora imaju veće koristi od primene lean koncepta poslovanja od ostalih. Naprotiv, koristi od primene lean koncepta u sektoru usluga umnogome zavise od stepena diverzifikovanosti tražnje, tj. zahteva klijenata, kao i učešća klijenata u pružanju konkretne usluge. Uticaj dodatno zavisi i od primenjene tehnike lean koncepta poslovanja.

Integracija lean koncepta poslovanja moguća je uz primenu odgovarajućih tehnika, među kojima se najčešće koriste: mapiranje toka vrednosti (Value Stream Mapping), standardizacija rada, vizuelna kontrola, Kaizen, 5S tehnika. *Mapiranje toka vrednosti* olakšava identifikaciju onih aktivnosti koje ne dodaju vrednost i kao tehnika korisna je za implementaciju lean koncepta poslovanja u uslužnom sektoru.

Standardizacija podrazumeva izbor najboljih metoda rada kako bi se postigao željeni kvalitet, snizili troškovi i skratilo vreme isporuke. Prema nekim shvatanjima unapređenja u poslovanju se ne mogu postići ukoliko se ne uspostavi standardizacija procedura, obavljanja zadataka i rada. Cilj je da se obezbedi da se iste aktivnosti obavljaju svaki put na isti način i smanji varijacija u procesima rada i kvalitetu proizvoda. Standardizacija rada jeste neophodan korak ka uspostavljanju dobro organizovane lean proizvodnje. Važno je voditi računa da se kroz

standardizaciju stvore mogućnosti za razvoj veština zaposlenih i da oni standardizaciju ne shvate kao set pravila na osnovu kojih će se prosuđivati o uspešnosti njihovog rada. Ukoliko se to ne postigne, upravo standardizacija rada može biti prepreka za uspostavljanje nesmetanog toka proizvoda kroz procese.

Standardizacija je pogodna metoda za primenu lean koncepta poslovanja i u uslužnom sektoru. Međutim, koristi od njene primene nisu podjednako važne kod svih tipova usluga. Polazeći od stepena diverzifikovanosti tražnje, razlikujemo usluge kod kojih su individualni zahtevi klijenata veoma različiti, i usluge koje karakteriše relativna homogenost zahteva klijenata. Imajući ovo u vidu, kod prvih se standardizacija procesa rada smatra nekorisnom tehnikom s obzirom da bi njena primena dovela do nižeg stepena satisfakcije klijenata. Na primer, u slučaju pružanja neke zdravstvene usluge, ista se mora prilagoditi konkretnom zdravstvenom stanju pacijenta. Pored toga, veći stepen uključenosti pacijenta implicira da takav klijent zahteva sofisticiraniju uslugu, te mu standardizovana usluga svakako neće odgovarati. U konačnom će to dovesti do nezadovoljstva klijenta, u ovom slučaju pacijenta. Standardizacija je, s druge strane, korisna kod onih usluga koje se često ponavljaju i beleže značajan obim transakcija. Takve su na primer usluge banaka i osiguravajućih kompanija. Međutim, i kod ovih usluga ima izuzetaka. U novije vreme, bankarski sektor se u nameri da očuva svoju tržišnu poziciju, prilagođava individualnim zahtevima klijenata. Tako se u okviru paketa privatnog bankarstva, klijentima nude usluge koje nisu standardizovane i karakteriše ih visok stepen usklađenosti sa zahtevima klijenata. U bankarskoj praksi, ove usluge figuriraju pod terminom „lični, tj. personalni bankar“. Imajući u vidu ograničavajuće domete standardizacije kao lean tehnike, nadalje u tekstu biće izložena 5S tehnika kao podrška adekvatnijoj primeni lean koncepta poslovanja u bankama.

3. UNAPREĐENJE POSLOVNIH PROCESA U BANKAMA I LEAN KONCEPT POSLOVANJA

Izložene procesima globalizacije, deregulacije, univerzalizacije, koncentracije i tehnologizacije, banke su izgubile svoju dugogodišnju monopolsku poziciju na tržištu finansijskih usluga. Nedavna finansijska kriza iz 2008. godine značajno je pogodila bankarski sektor i ugrozila opstanak brojnih, čak i većih banaka. Narušeno poverenje klijenata u bankarski sektor, bilo je povod za značajnije regulatorne pritiske. Ovde je potrebno napomenuti da su banke i u nekriznom periodu predmet strožijih regulatornih zahteva nego što je to slučaj sa ostalim institucijama [13], [7]. Pored toga, sve značajnija konkurencija na tržištu finansijskih usluga je i uz postojanje univerzalne licence banaka, zahtevala radikalnu izmenu koncepta poslovanja banaka.

Banke se često porede sa firmama iz oblasti telekomunikacija, s obzirom da u pružanju svojih usluga prikupljaju, obrađuju i distribuiraju informacije. Time se kvalitet i brzina pružene usluge izdvajaju kao bitan faktor satisfakcije klijenata. Imajući u vidu njihovu procesnu prirodu, fokus treba biti na povećanju operativne efikasnosti banke, čime se otvara prostor za primenu lean koncepta u bankarstvu [14]. Direktna primena principa lean koncepta poslovanja iz proizvodnje na banke nije moguća imajući u vidu njihovu različitost po brojnim osnovama: priroda proizvoda/usluga; proizvodni proces i uključenost klijenata [7]. Bankarske usluge imaju brojna obeležja slična ostalim vrstama finansijskih usluga: nematerijalnost, neodvojivost čina vršenja i čina korišćenja usluge, pasivno prilagođavanje ponude usluga tražnji, heterogenost, i slično [6]. Usled svoje specifične monetarne prirode ove usluge se jasno razlikuju od drugih usluga (davalac usluge je često u poziciji agenta korisnika usluge, odnos između davaoca i korisnika

usluge je često personalan i trajan, a korisnici usluga često u mogućnosti da odluče o korišćenju usluge).

Bankarski proizvodi su nematerijalne prirode i zasnovani na informacijama; proizvodni proces uključuje obradu informacija i administrativne je prirode, a klijenti su direktno uključeni u isporuku proizvoda, što nije slučaj u proizvodnji. Imajući u vidu navedene specifičnosti bankarske delatnosti, kao ključne oblasti u kojima lean koncept može naći svoju primenu izdvajaju se: smanjenje vremena/troškova za pružanje bankarskih usluga; povećanje satisfakcije klijenata pružanjem brže i kvalitetnije usluge; eliminisanje rutinskih procena i povećanje radnog morala i entuzijazma njihovim uključenjem u razvoj i primenu inovacija.

U sektoru usluga, najčešća je primena “5S” tehnike, koja podrazumeva sledeće elemente [3, p.249]:

Sortirati (Sorting) – razdvajanje potrebnog od nepotrebnog;

Urediti (Straighten; Set in Order) - organizacija radnog mesta;

Očistiti (Schine, Scrub) - očistiti i pomeriti sve ono što može da stvara problem u radu;

Standardizovati (Standardize) – primeniti procedure i obezbediti njihovo razumevanje od strane radnika, i

Održavati (Sustain) – podesiti sistem da funkcioniše uz potpunu komunikaciju i po principu neprekidnog toka.

U cilju rasterećenja radnog prostora neposredni izvršioci moraju da identifikuju predmete koji su potrebni za obavljanje njihovih zadataka i predmete koji se ne koriste u obavljanju zadataka, a nalaze se u radnom prostoru. Primenjeno na banke, ovo podrazumeva da su zaposleni odgovorni za *sortiranje* kancelarijskog materijala, mejlova, fajlova kako bi se u pružanju konkretne bankarske usluge fokusirali isključivo na bitne informacije i aktivnosti. Aktivnosti se pritom mogu podeliti na one koje dodaju vrednost i one koje ne dodaju vrednost. Fokus je najpre na eliminisanje onih aktivnosti koje po mišljenju klijenata ne dodaju vrednost. Među njima, jedan deo je obavezne prirode (regulatorni zahtevi), te se kao takav ne može eliminisati. Iz tih razloga, fokus treba biti na unapređenju obaveznih aktivnosti koje ne dodaju vrednost i aktivnosti koje dodaju vrednost sa stanovišta klijenata [11].

Kako bi se dokumentima lakše manipuliralo, potrebno je *uređenje* radnog mesta tako da predmeti koji su neophodni za nesmetano odvijanje procesa budu smešteni na vidno i lako dostupno mesto. U banci se ovo postiže definisanjem standardnih lokacija za pristup bazama podataka, operativnim procedurama, izveštajima. Radni prostor i svu neophodnu opremu i servise treba očistiti uz prethodno definisanje načina i sredstava za čišćenje, tj. procedura kojih će se pridržavati svi zaposleni. Ovaj način sređivanja radnog mesta i čišćenja mora da postane navika i da proдре u svest zaposlenih. Primena “5S” tehnike nesporno će dovesti do napretka u poslovanju banke. Ipak, održivost ovog procesa zahteva motivisane zaposlene, što podrazumeva da napredak koji je učinjen u organizaciji radnog mesta bude vidljiv i nagrađen.

Kako bi koristi od primene tehnika lean koncepta u bankarstvu bile veće treba obezbediti jednostavnije bankarske procedure. U tom smislu, smatra se korisnim odvajanje usluga koje koristi većina klijenata od onih koje koriste samo pojedini klijenti; pružanje veće slobode klijentima u odnosima sa bankarskim službenikom; davanje mogućnosti bankarskom službeniku da na zahtev klijenta prekine svoje redovne poslovne aktivnosti kako bi sagledao zahtev klijenta, itd. Ovo je posebno važno u bankarstvu na malo (Retail Banking), segmentu bankarstva koje je namenjeno sektoru stanovništva.

Digitalizacija poslovanja je nametnula brojne izazove pred banke: nove vidove pružanja bankarskih usluga i nove konkurente oličene u finansijsko-tehnološkim kompanijama. U takvim uslovima, one banke koje primenjuju lean koncept poslovanja, biće u većoj mogućnosti da ove tehnološke promene usvoje i iskoriste u svrhu potpunijeg razumevanja i zadovoljenja zahteva svojih klijenata. Opšti trend digitalizacije u poslednjim decenijama uticao je da se inovativni kanali distribucije bankarskih proizvoda, tj. pružanje usluga posredstvom elektronske komunikacije, jave kao posebna vrsta bankarske usluge (elektronsko bankarstvo). Ovim putem ne samo klijenti koji su skloni korišćenju društvenih mreža i elektronskih servisa, već i oni koji koriste tradicionalne kanale distribucije bankarskih usluga, bivaju u većoj meri integrisani u bankarsko poslovanje. Sve veća upotreba smart telefona i tableta čini da i same bankarske usluge postanu „mobilne“. Tako npr. usluga GPS lokacije na smart telefonima omogućava banci da dobije informacije o kretanjima klijenta, mestima gde kupuje, i na taj način prilagodi svoje usluge klijentu na lokacijama koje on često posećuje [2]. Pored toga, zahvaljući elektronskom bankarstvu, bankarsku uslugu je moguće pružiti i u područjima gde ne postoje filijale banaka, a bankarsku proceduru toliko pojednostaviti da se autorizacija transakcija vrši preko biometrijskih dokumenata (otisak prstiju ili fotografija) [10, pp.88-89].

Osim u diverzifikaciji bankarskih aktivnosti i većoj integraciji klijenata, lean koncept poslovanja treba doprineti i nižim troškovima poslovanja banke. Imajući u vidu da su banke najregulisanije finansijske institucije, dobar deo njihovih troškova zavisi od regulatorne politike Narodne banke Srbije kao regulatora i supervizora nad bankama. Uvođenjem sistema za instant plaćanja čiji je operator NBS (IPS NBS system), 22. oktobra tekuće godine, regulator je doprineo bržoj i jeftinijoj bankarskoj usluzi. Ovim sistemom omogućen je prenos novca u roku od samo nekoliko sekundi, uz plaćanje gotovo simbolične naknade. Ovakav sistem omogućio je bankama da koriguju svoju tarifnu politiku i ubuduće klijentima naplaćuju niže naknade za pružene usluge. Dodatni pritisak za banke je i potreba za očuvanjem životne sredine, usled čega banke integrišu principe održivosti u svoje poslovanje [12]. S tim u vezi banke su razvile interne sisteme za smanjenje svog uticaja na životnu sredinu i time doprinele adekvatnijem ispunjenju osnovnih elemenata lean koncepta poslovanja.

Banke stalno inoviraju svoje bankarske usluge kako bi udovoljile promenljivim zahtevima klijenata, usled čega je banka i evoluirala od specijalizovane do univerzalne finansijske institucije. Složenija bankarska struktura kakva prati univerzalne finansijske posrednike povećava rizik, troškove i vreme pružanja bankarske usluge. U takvim uslovima, primena različitih tehnika lean koncepta poslovanja omogućiće pružanje kvalitetnije bankarske usluge po ekonomskim principima, što jeftinije i što brže.

4. ZAKLJUČAK

Izmenjeni uslovi u poslovanju preduzeća, sve kompleksniji zahtevi klijenata i sve jača konkurencija, nametnuli su potrebu za primenom savremenih menadžment alata. Lean koncept poslovanja među njima zauzeo je posebno mesto. Usmeren na eliminisanje gubitaka u poslovanju i unapređenje operativne efikasnosti, lean koncept poslovanja je najpre primenjen u proizvodnji. Rastući značaj uslužnog sektora poslednjih decenija prošlog veka nametnuo je potrebu njegove primene i u sektoru usluga. U radu je posebno analizirana specifičnost njegove primene u bankarskom sektoru. Direktna primena principa lean koncepta poslovanja iz proizvodnje na banke nije moguća, imajući u vidu da usluge karakteriše nematerijalnost, neodvojivost čina vršenja i čina korišćenja usluge, pasivno prilagođavanje ponude usluga tražnji, heterogenost, itd. Kada je reč o bankarskim uslugama, dodatna specifičnost je i njihova monetarna priroda, personalan i trajan odnos između davaoca i korisnika usluge, kao i značajan

regulatorni pritisak. Opšta digitalizacija poslovanja nametnula je potrebu pružanja kvalitetnije bankarske usluge putem novih kanala distribucije, za šta su se banke morale pripremiti prethodnim povećanjem svoje operativne efikasnosti. Kako bi snizile troškove poslovanja i unapredile procese upravljanja rizikom, banke su otpočele se primenom tehnika lean koncepta poslovanja. Među njima, posebno se korisnom pokazala tehnika 5S.

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ULOGA I ZNAČAJ BANKARSKOG SEKTORA U OSTVARIVANJU CILJEVA ODRŽIVOG RAZVOJA

THE ROLE AND IMPORTANCE OF THE BANKING SECTOR IN ACHIEVING SUSTAINABLE DEVELOPMENT GOALS

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Sadržaj: Ciljevi održivog razvoja se ne mogu ostvariti bez zajedničkog i sinergijskog delovanja različitih privrednih i društvenih subjekata, organizacija i institucija. Cilj ovog rada je da, analizom uticaja bankarskog sektora na ekonomsku, socijalnu i ekološku dimenziju održivog razvoja, doprinese jasnijem razumevanju njegove uloge i značaja za ostvarivanje ciljeva održivog razvoja. Rad ukazuje i na značaj uvođenja koncepta održivog razvoja u bankarsko poslovanje putem integrisanja pitanja zaštite životne sredine i društvenog razvoja u poslovne politike i strategije banaka.

Ključne reči: Održivi razvoj, društveno odgovorno poslovanje, zaštita životne sredine, održivo bankarstvo.

Abstract: The goals of sustainable development cannot be achieved without the common and synergistic action of various economic and social subjects, organizations and institutions. The aim of this paper is to contribute to a clearer understanding of its role and importance for achieving sustainable development goals, by analyzing the impact of the banking sector on the economic, social and ecological dimension of sustainable development. The paper also points to the importance of introducing the concept of sustainable development into banking operations by integrating environmental issues and social development into business policies and strategies of banks.

Keywords: Sustainable development, socially responsible operating, environmental protection, sustainable banking.

1. UVOD

U periodu nakon Drugog svetskog rata brojne građanske inicijative i kolektivne akcije uticale su na povećanje svesti o potrebi rešavanja četiri akutna problema sa kojima se svet suočava: mir u svetu, sloboda, razvoj i zaštita životne sredine. Tokom 70-ih i 80-ih godina XX veka došlo je do formiranja brojnih svetskih komisija, koje su doprinele institucionalizaciji ovih problema i aktivnom promišljanju načina za njihovo rešavanje. Aktivnosti ovih komisija bile su usmerene ka povećanju kolektivne svesti o međusobnoj povezanosti ovih problema i značaju interaktivnog delovanja svih zainteresovanih aktera u

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pravcu njihovog rešavanja. Održivi razvoj, koncept koji stavlja akcenat na visok stepen povezanosti između razvoja i zaštite životne sredine, predstavlja tipičan produkt takvih nastojanja.

Pitanja održivog razvoja dobijaju na značaju ulaskom u XXI vek, kada je postalo jasno da nagli porast broja stanovnika na planeti vrši veliki pritisak na raspoložive resurse i preti njihovom iscrpljivanju i ozbiljnom ugrožavanju stanja u životnoj sredini. Svet je danas suočen sa problemom zajedničke odgovornosti, zahtevom za delovanjem na globalnom nivou kako bi se privredni razvoj prilagodio potrebama prirode i ljudi, kao i sa moralnom odgovornošću da se planeta mora sačuvati za buduće generacije. Ono što predstoji sadašnjoj generaciji je da potomstvu ostavi bar onoliko mogućnosti za razvoj koliko ih ona ima. Usled toga, pitanja održivog razvoja postaju centralna preokupacija nosioca ekonomske politike svih zemalja.

Održivi razvoj nije sam sebi svrha: njegov cilj je da se obezbedi kontinualno raspolaganje ograničenim resursima u dugom vremenskom periodu. Ciljevi održivog razvoja se ne mogu ostvariti bez zajedničkog, sinergijskog delovanja velikog broja različitih privrednih i društvenih subjekata, organizacija i institucija. Mnogi privredni sektori, prisutni u privrednom životu jedne nacionalne ekonomije, su pod uticajem nastojanja da se razvoj ostvaruje na održivoj osnovi morali da evoluiraju, kako bi postali ravnopravan akter u aktuelnim tokovima. Među njima se svakako ističe bankarski sektor, koji predstavlja noseći stub razvoja jedne nacionalne ekonomije. Usled toga, uloga i značaj bankarskog sektora u ostvarivanju ciljeva održivog razvoja predmet je istraživanja ovog rada.

2. ZNAČAJ ODRŽIVOG RAZVOJA U SAVREMENIM USLOVIMA POSLOVANJA

Početak sedamdesetih godina XX veka dominiralo je stanovište o nepostojanju usklađenosti između koncepta ekološke zaštite i koncepta ubrzanog razvoja. Rešavanje problema razvoja usmeravanjem pažnje ka ostvarivanju veće stope privrednog rasta imalo je za posledicu povećanje ekološkog pritiska u ekstrakciji prirodnih resursa i time uslovljenu pojavu ogromnih problema zagađenja životne sredine. Pridavanje veće pažnje privrednom rastu i zanemarivanje problema ekološke zaštite posledica je pogrešnog uverenja da ekološka zaštita zahteva preusmeravanje realnih i finansijskih resursa sa proizvodnje na oblast zaštite životne sredine i da time ograničava rast GDP-a. U poslednjoj deceniji XX veka, sa evolucijom poimanja o razvoju u pravcu implicitnog naglašavanja održivog razvoja, shvaćeno je da ova dva koncepta čine dva komplementarna aspekta održivog razvoja.

Kreatori ekonomske politike, poslovna zajednica, brojne vladine i nevladine organizacije postigli su saglasnost o potrebi i značaju hitnog preduzimanja mera i aktivnosti radi ostvarivanja ciljeva održivog razvoja. Činjenica je da ukoliko bi se nastavilo sa eksploatacijom neobnovljivih i neograničenih resursa u onoj meri koju diktira planirana progresija stope privrednog rasta, vrlo brzo bi se došlo do tačke iscrpljivanja resursa i bespovratnog ugrožavanja životne sredine, i to bez alternative za budući period. U tom smislu, održivi razvoj, pored ekonomske, uzima u obzir i socijalnu i ekološku dimenziju razvoja, kako bi se omogućila održivost i optimalna pozicija svih aktera koji učestvuju u procesu ostvarivanja razvoja, ali i suočavanje sa posledicama i koristima koje razvoj donosi.

3. DOPRINOS BANKARSKOG SEKTORA OSTVARIVANJU CILJEVA ODRŽIVOG RAZVOJA

Banke su u poslednjoj deceniji XX veka počele sve više da uključuju elemente održivosti u svoje osnovne aktivnosti. Aktivnosti odlučivanja kod odobravanja kredita i procene kreditnog portfolija uključuju i kriterijume zaštite životne sredine i socijalne odgovornosti korisnika kredita [1]. Ovakav reaktivni, odbrambeni i povrh svega, tradicionalni pristup održivosti ustupa mesto inovativnim i proaktivnim strategijama, koje imaju za cilj ostvarivanje koristi koje pruža primena koncepta održivosti u bankarsko poslovanje. Usmerenost banaka ka održivom bankarstvu je, takođe, odraz suočavanja sa trodimenzionalnim pristupom u donošenju investicionih odluka na finansijskom tržištu, baziranom ne samo na analizi prinosa i rizika, već i uticaja koje organizacije imaju na životnu i društvenu sredinu [2].

U deceniji koja je usledila nakon poslednje globalne finansijske krize bankarsko poslovanje prolazi kroz transformaciju od tradicionalnog, dominantno profitno orijentisanog, ka održivom bankarstvu, koje podrazumeva stvaranje vrednosti za same banke, finansijski sistem i društvo u celini. Za banke, održivo bankarstvo predstavlja mogućnost za povećanje tržišnog učešća, profita i lojalnosti korisnika finansijskih usluga, kao i poboljšanje imidža i osvajanje pozitivne medijske pažnje [3]. Empirijska istraživanja veze između poslovanja finansijskog sektora i održivog razvoja pokazala su da implementacija koncepta održivosti može imati pozitivan uticaj na stabilnost bankarskih profita [4], a time i na stabilnost finansijskog sistema.

Formalna definicija održivog bankarstva se još uvek razvija. Često se održivo bankarstvo posmatra kao kombinacija upravljanja rizicima (procena i upravljanje ekološkim i socijalnim rizicima kao deo donošenja odluka u bankama) i odobravanja “zelenih” kredita (kao podrška poslovnim subjektima sa pozitivnim uticajem na životnu sredinu i društvo). Ove dve komponente se smatraju jezgrom održivog bankarstva sa varijacijama u smislu pridavanja manjeg ili većeg značaja jednoj ili drugoj i uključenosti socijalne dimenzije [5]. Uvođenje socijalne dimenzije u definiciju održivog bankarstva nalazi opravdanje u činjenici da se socijalna pitanja prepliću sa pitanjima životne sredine i mogu imati uticaj na poslovanje banaka (na primer, obustavljeni projekti, kašnjenje u izgradnji, pristup kreditima za marginalizovane grupe i sl.).

“Zelene” finansije se često nazivaju održivim ili ekološkim, ali između ovih koncepata ipak postoji određena razlika [3]. “Zelene” finansije predstavljaju strategiju finansiranja koja teži da ostvari istovremeno razvoj finansijskog sektora, poboljšanje životne sredine i ekonomski rast i razvoj. Održive finansije predstavljaju praksu stvaranja ekonomske i društvene vrednosti (posredstvom finansijskih proizvoda i tržišta) koje su održive tokom vremena. To je širi koncept koji obuhvata investicije koje su sveobuhvatnije i inkluzivnije posmatrano ne samo sa aspekta životne, već i društvene sredine. Finansiranje životne sredine je fokusirano na ekološko okruženje zbog čega može da izostane doprinos privrednom rastu [3].

Održive banke se često nazivaju i društveno odgovornim bankama. Društveno odgovorno bankarstvo inkorporira sve aspekte održivog razvoja. Prema hijerarhiji strukture korporativne društvene odgovornosti, na dnu piramide se nalazi ekonomska odgovornost (profitabilno poslovanje), zatim sledi legitimna odgovornost (obaveza poštovanja zakona) i etička odgovornost, dok se na vrhu nalazi filantropska odgovornost kao doprinos društvu i poboljšanju kvaliteta života (Slika 1) [6].

Slika 1: Struktura korporativne društvene odgovornosti [6]



Piramida ilustruje koncept društveno prihvatljive profitabilnosti bazirane na poštovanju zakonskih propisa i etičkih normi, ali ukazuje i da je profitabilnost bitna kao finansijska osnova za filantropiju i brigu za društvo. Kao ključni deo finansijske infrastrukture, banke će doprineti društvenoj sredini ukoliko su profitabilne organizacije koje pažljivo upravljaju rizicima. Finansijska održivost je u funkciji promovisanja održive ekonomije. Ona se nadograđuje socijalnom održivošću kroz doprinos razvoju društva, održivošću životne sredine kroz doprinos njenoj zaštiti i unapređenju. Interna društvena odgovornost podrazumeva odgovorno ponašanje prema zaposlenima, dok se eksterna odnosi na odgovornost prema državi i brigu o društvu.

Banke doprinose ostvarivanju ciljeva održivog razvoja kako (a) direktno, putem transformacije internih procesa (na primer uvođenjem *online* pružanja bankarskih usluga, što vodi smanjenju upotrebe kancelarijskog materijala, ulaganjem u bolju izolaciju, uvođenjem sistema upravljanja otpadom), tako i (b) indirektno, kreiranjem prilagođenih bankarskih proizvoda i usluga koji doprinose očuvanju životne i društvene sredine [7].

Tabela 1: Zeleni finansijski proizvodi i usluge [3]

| | |
|--|---|
| Poslovanje sa stanovništvom | Zeleni hipotekarni krediti (<i>Energy Efficient Mortgages</i>), krediti za zelene komercijalne objekte (<i>Green Commercial Building Loans</i>), zeleni krediti za kupovinu automobila, zelene kreditne kartice |
| Poslovanje sa privredom i investiciono bankarstvo | Zelena projektno finansiranje, zelena sekjuritizacija (na primer <i>Forest bonds</i>), angažovanje u IPO za firme koje su odgovorne prema životnoj sredini, razvoj indeksa energetske efikasnosti, kreditiranje bazirano na emisiji štetnih gasova |
| Upravljanje imovinom | Zeleni fiskalni fondovi (kupovinom udela u zelenom fondu ostvaruju se određene koristi u vidu umanjenja poreza), zeleni investicioni fondovi, "carbon" fondovi |
| Osiguranje | Proizvodi osiguranja sa diferenciranom premijom prema ekološkim karakteristikama, proizvodi osiguranja prilagođeni "čistim" tehnologijama, osiguranje bazirano na emisiji štetnih gasova |

Sve veća zabrinutost u društvu za životnu sredinu i promovisanje društvene odgovornosti kao standarda poslovanja usmerava banke ka razvijanju novih proizvoda i usluga (Tabela 1). Pored toga, prisutna je težnja društveno odgovornih banaka da podrže ekološke i društveno odgovorne

inicijative (programi unapređenja energetske efikasnosti, kulturni i sportski događaji, donacije itd.).

Banke prepoznaju i značaj unapređenja poslovnih politika i strategija u pravcu održivosti, a one organizacije koje integrišu sve aspekte održivosti u svakodnevno poslovanje vide to kao način izgradnje dugoročne finansijske vrednosti. Pojedine velike globalne i nacionalne banke (na primer Citi, Swedbank) ističu da njihovo poslovanje usmeravaju Globalni ciljevi održivog razvoja (UN's *Global Goals – the Sustainable Development Goals*) i da im je zadatak zauzimanje liderske pozicije u ostvarivanju ovih ciljeva kroz inovativna rešenja i promovisanje održivosti [8], [9].

Uloga bankarskog sektora u ostvarivanju ciljeva održivog bankarstva posebno je naglašena u zemljama u razvoju. Iskustva iz ovih zemalja, međutim, pokazuju da se regulatori i udruženja banka suočavaju sa brojnim preprekama u kreiranju nacionalnih okvira za održivo bankarstvo (Tabela 2). Pozitivna iskustva zemalja u razvoju (na primer, Brazil i Nigerija) pokazuju da kombinacija podrške kreatora politike i regulatora održivom bankarstvu i dobrovoljnih inicijativa samih banaka podstiču održivo bankarstvo i povećavaju doprinos bankarskog sektora nacionalnim ciljevima održivog razvoja [5].

Tabela 2: Prepreke sa kojima se suočava razvoj održivog bankarstva u nacionalnim okvirima zemalja u razvoju [5]

| | |
|---|--|
| <i>Definisanje i merenje održivog bankarstva</i> | Nepostojanje jedinstvene definicije, nedostupnost relevantnih podataka i odsustvo sistematskog pristupa merenju i praćenju napretka i efekata održivog bankarstva na globalnom nivou |
| <i>Uvođenje održivosti u osnovno bankarsko poslovanje</i> | Problemi vezani za upravljanje ekološkim i socijalnim rizicima, anticipiranje ovih rizika na nivou individualnih institucija i sistemskom nivou |
| <i>Kreiranje podsticaja za održivo bankarstvo</i> | Mali broj empirijskih istraživanja koja se bave troškovima i koristima "ozelenjavanja" bankarskog poslovanja, ograničeno objavljivanje podataka o troškovima i prinosima u vezi sa održivim bankarstvom |
| <i>Ograničenost protoka informacija u vezi sa održivim bankarstvom</i> | Ograničenja u vezi sa pristupom bazama podataka koje omogućavaju adekvatnu klasifikaciju i evaluaciju kredita, informacije nisu prikazane na način koji omogućava razumevanje i donošenje odluka na finansijskim tržištima |
| <i>Nedostatak ekspertize i kapaciteta</i> | "Zelene" tehnologije se brzo razvijaju i zahtevaju ekspertizu za procenu održivosti, kako regulatora i supervizora banaka, tako i samih banaka |

Popularizacija koncepta održivosti i društvene odgovornosti u Republici Srbiji rezultirala je usvajanjem društveno odgovornog ponašanja, kao standarda u poslovanju banaka. Sve banke su u većoj ili manjoj meri uključene u ove aktivnosti, ali se razlikuje stepen njihove uključenosti, odnosno obim i namena izdvojenih sredstava za podršku održivom razvoju. Banke u Republici Srbiji pokazuju najviši stepen društvene odgovornosti prema društvenoj zajednici (pretežno ulažu u humanitarne aktivnosti i pružaju podršku obrazovanju, kulturi i sportu), dok su manje posvećene zaštiti životne sredine i dobrobiti zaposlenih i odgovornosti prema ugroženim grupama [10].

Zaostajanje angažovanja banaka u oblasti zaštite životne sredine je primetno u odnosu na razvijene evropske zemlje. U praksi banaka se ističu prilagođeni proizvodi i usluge (na primer, krediti za energetska efikasnost) i projekti zaštite životne sredine (na primer, revitalizacija i rekonstrukcija centralnih gradskih parkova). Ponuda finansijskih proizvoda bankarskog sektora sadrži i elemente socijalnog bankarstva u vidu podrške početnicima u poslovanju i socijalnim preduzećima. Prisutni su naponi na polju povećanja stepena finansijske inkluzije putem pružanja finansijskih usluga klijentima sa niskim prihodima, iz ruralnih sredina, penzionera, osoba sa invaliditetom, kao i gluvih i nagluvih lica. Pojedine banke pomažu zaposlenima koji žive u teškim socijalnim uslovima ili im je potrebna posebna pomoć.

U bankarskom sektoru Republike Srbije postoji težnja da se poveća stepen transparentnosti društveno odgovornog poslovanja usklađivanjem sa smernicama međunarodnih okvira izveštavanja o održivosti, poput Globalne inicijative izveštavanja [10].

4. ZAKLJUČAK

Kreatori ekonomske politike, ali i cela ljudska civilizacija danas se suočavaju sa ekološkim posledicama "pregrejanog" rasta u prošlosti. To nameće potrebu za zajedničkim, sinergijskim delovanjem svih relevantnih aktera, različitog hijerarhijskog nivoa, nacionalnog i internacionalnog karaktera na podizanju svesti o značaju ostvarivanja održivog razvoja.

U procesu tranzicije ka održivom razvoju, finansijski sektor može odigrati ključnu ulogu generisanjem promena u poslovanju ne samo finansijskih institucija, već i čitave privrede. Iako banke, zbog same prirode bankarskih poslova, ne učestvuju direktno u eksploataciji i zagađivanju životne sredine, kao finansijski posrednici u jednoj nacionalnoj ekonomiji one snose indirektnu odgovornost za stanje u životnoj sredini. Banke mogu da doprinesu rešavanju brojnih ekoloških problema i ostvarivanju strateških ciljeva održivog razvoja jedne nacionalne ekonomije kako uključivanjem koncepta društveno odgovornog poslovanja u sve interne aktivnosti, tako i usmeravanjem spoljnih aktivnosti (kao što su kreditiranje i investicije) na vrednovanje i podsticanje održivosti među klijentima i drugim entitetima u društvu.

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**KOMPARATIVNA FINANSIJSKA ANALIZA POSLOVANJA
INOSTRANIH I DOMAĆIH BANAKA U REPUBLICI SRBIJI U
PERIODU SVETSKE FINANSIJSKE KRIZE**

**COMPARATIVE FINANCIAL BUSINESS ANALYSIS OF FOREIGN
AND DOMESTIC BANKS IN THE REPUBLIC OF SERBIA IN THE
PERIOD OF THE WORLD FINANCIAL CRISIS**

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Apstrakt: U ovom radu, putem sistematično izvršene finansijske analize, dat je osvrt na uticaj globalne finansijske krize na mnogobrojne aspekte uspešnosti poslovanja bankarskog sektora u Republici Srbiji. Kroz rad su prikazane strukturne i dinamičke promene u bilansu stanja i uspeha banaka, korišćenjem indikatora finansijske analize, na prvom mestu pokazatelja finansijske strukture i položaja. Kao osnova za analizu korišćeni su javno raspoloživi, godišnji, finansijski izveštaji posmatranih subjekata bankarskog sektora. Komparativnom analizom predočava se i iskazuje finansijski položaj banaka koje su osnovane na teritoriji Republike Srbije većinskim akcionarskim kapitalom ino-banaka i banaka čiji je akcionarski kapital u većinskom vlasništvu Republike Srbije.

Ključne reči: finansijska analiza; svetska ekonomska kriza; bankarski sektor;

Abstract: In this paper, through a systematic financial analysis, a review of the impact of the global financial crisis on numerous aspects of the performance of the banking sector in the Republic of Serbia is given. Structural and dynamic changes in the banks' balance sheets and their performance, using the indicators of financial analysis, are presented in the first place. The basis for the analysis were publicly available annual financial reports of the observed entities of the banking sector. The comparative analysis presents the financial position of banks that are established on the territory of the Republic of Serbia by majority share capital of foreign banks and banks whose share capital is majority owned by the Republic of Serbia.

Keywords: financial analysis; world economic crisis; the banking sector;

1. UVOD

Komparativna analiza koja će biti izložena u radu ima za cilj da osvetli materijalno značajne bilansne pozicije banaka u okviru bankarskog sektora Republike Srbije, u posmatranom intervalu od 31.12.2006. zaključno sa 31.12.2009. Ovaj period je uzet u razmatranje jer je to period izbijanja i eskaliranja svetske ekonomske krize, pod čijim uticajem se našla i privreda Republike Srbije. Namera je da se na egzaktn način ukaže kako je globalna finansijska kriza uticala i koje efekte je kreirala u poslovanju konkretnih domaćih banaka. Samim radom su obuhvaćeni pregledi koji su temeljeni na metodi komparativne analize, a koji

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predstavljaju osnov za koncizno i sistematično izvođenje poređenja jedne komponente koja je raščlanjena na pojedine indikatore koji sačinjavaju, i ujedno objedinjeni prikazuju srž uspešnosti poslovanja banaka.

Cilj rada jeste da se prikaže sveobuhvatna ocena nivoa efektivnosti i efikasnosti predmetne komponente istraživanja na osnovu javno obelodanijenih podataka iz godišnjih finansijskih izveštaja putem metode komparativne analize.

Doprinos ovog rada ogleda se u definisanju razlika u poslovanju uspešnih i manje uspešnih banaka, gde rezultati u periodu za koji se sačinjava analiza nisu direktno zavisili od visine profitabilnosti, efektivnosti i rentabilnosti poslovanja. Zanimljivo je da , u periodu analize rada banaka (2006/2009), ništa nije indikovalo da će se kao posledica globalne finansijske krize i internih nedostataka u poslovanju privrednih subjekata pojaviti negativni rezultati koji će direktno voditi do konačnog bankrota pojedinih banaka.

Usled pojačane deregulacije bankarskog sektora došlo je do koncentracije banaka i globalizacije svetske privrede, što je bilo preduslov za brojne fuzije (međubankarska pripajanja, spajanja) banaka, odnosno za smanjenje broja banaka na bankarskom tržištu. Globalizacija bankarskog tržišta, odnosno razudjenja bankarska mreža dovodi do približavanja banaka svojim klijentima, što će reći da jedan od osnovnih ciljeva banke postaje zadovoljenje finansijskih potreba klijenata. Dalje, pojačana konkurencija, kako između samih banaka, tako i između banaka i drugih finansijskih institucija, dovela je do porasta značaja marketinga u bankama tj. do implementacije i ubrzanog razvoja marketing strategije u poslovnoj politici banaka.

Sa druge strane, zemlje u tranziciji se suočavaju sa potrebom transformacije bankarskog sistema zbog godinama nagomilavanih gubitaka i sunovrata bankarstva. Takav vid transformacije bankarskog sistema dogodio se u našoj zemlji 2001. god. Naime, finansijski sistem naše zemlje se tradicionalno zasniva na dominantnom bankarskom sektoru. Od 2001.godine na finansijsko tržište Srbije dolaze strane banke, prvo formirajući nove banke (afilijacije), a zatim kupujući postojeće domaće banke u društvenom (državnom), ali i privatnom vlasništvu. Kao rezultat toga, od 37 banaka koliko ih je bilo u Srbiji krajem 2006.godine, 22 banke bile su u stranom vlasništvu, sa učešćem u ukupnoj bilansnoj sumi bankarskog sektora Srbije od 78,7%. Uslov za dolazak stranih banaka u Srbiju, bilo je donošenje nove zakonske regulative u skladu sa međunarodnom praksom i standardima. To je u velikoj meri vratilo poverenje u bankarski sistem, profesionalizovalo delatnost, poboljšalo ponudu bankarskih proizvoda i olakšalo pristup kapitalu privrednim subjektima koji zadovoljavaju postavljene standarde kreditne sposobnosti.

Ovakav razvoj bankarskog sektora međutim nisu pratile odgovarajuće promene u ostalim segmentima finansijskog sistema, a još manje u realnom sektoru privrede. Došlo je do kreditne ekspanzije zasnovane u dobroj meri na zaduživanju banaka u stranom vlasništvu u Srbiji kod svojih matičnih banaka u inostranstvu, ali i direktnom zaduživanju privrednih subjekata iz Srbije u inostranstvu. To je pored rasta ukupnog spoljnog duga zemlje, generisalo značajan inflatorni pritisak i doprinosilo deficitu spoljnotrgovinskog bilansa i bilansa tekućih plaćanja. Pri tome, vezivanje obaveza domaćih krajnjih korisnika kredita za stranu valutu i međunarodne tržišne kamatne stope, unosi dodatne rizike u domaći finansijski sistem. Povremene restriktivne kreditno-monetarne mere Narodne banke Srbije davale su određene efekte, ali postavljalo se pitanje koliko i dokle Narodna banka Srbije može sama da uspešno kontroliše čitav finansijski sistem u kome ključnu ulogu ima bankarski sektor Srbije sa dominantnom stranom komponentom.

Kompleks ekonomskih, a posebno finansijskih problema našao se u fokusu međunarodnih odnosa, pred, u toku, a pogotovo nakon izbijanja globalne ekonomske krize 2008. godine, te je akcenat u samom radu i stavljen na vremenski period u rasponu koji obuhvata segmentno sve tri faze. [1] Opseg delovanja finansijske krize koja je otpočela u SAD i koja je uzrokovala kolaps bankarskog sistema, nije bio isti na sve sfere ekonomskog života, niti se identično manifestovao u nacionalnim privredama zemalja. Zemlje suočene sa usporavanjem rasta pribegavaju „finansijskom protekcionizmu“, što je najviše pogodilo zemlje u tranziciji koje su oslonjene na kredite inostranih poslovnih banaka i čije filijale posluju na njihovim tržištima, što je slučaj i sa srpskom privredom.

Situacija u našoj zemlji u posmatranom periodu govorila je pak, da je uticaj globalne krize pokrenuo efekat „lavine naslaga“ loše ekonomske prakse u realnoj privrednoj sferi, koji se manifestovao i na bankarski sektor. [2] Te se kao pretpostavka postavlja, da je zajedno sa politikom "jeftinog novca", značajni faktor za kreiranje finansijske krize svakako bio i nedostatak adekvatne regulacije finansijskog sistema i nadzor funkcionisanja u praksi. [3]

2. PODLOGA ZA ANALIZU

Bankarsko tržište Srbije, u analiziranom vremenskom intervalu od 2006. zaključno sa 2009. godinom, imalo je 37 (2006. godine), odnosno 34 banke (2009. godine) sa aktivnim dozvolama za rad izdatim od strane NBS-a, što i ilustruje sledeća tabela:

Tabela 1: Pokazatelji finansijske pozicije i snage

u mil. EUR

| Redni broj | Indikator | Poslovna godina (zaključno sa 31.12.) | | | |
|------------|--------------------------|---------------------------------------|--------|--------|--------|
| | | 2006 | 2007 | 2008 | 2009 |
| 1 | Broj banaka | 37 | 35 | 34 | 34 |
| 2 | Ukupna bilansna veličina | 16.130 | 21.182 | 21.632 | 24.420 |
| 3 | Ukupan kapital | 2.972 | 4.411 | 4.879 | 5.080 |
| 4 | Kreditna aktivnost | 7.523 | 10.440 | 12.609 | 13.544 |

Izvor: <http://www.ubs-asb.com/Default.aspx?tabid=538>

Posmatrajući period od nastanka globalne finansijske krize, dominantnu ulogu u finansijskom sistemu Srbije imao je bankarski sektor, sa učešćem u 2008. godini od 89,3% u ukupnoj bilansnoj sumi finansijskog sektora pod nadzorom Narodne banke Srbije, i činio je ključni faktor stabilnosti istog, dok je u 2009. godini, bankarski sektor i dalje imao dominantnu ulogu sa učešćem od čak 91,1% u ukupnoj bilansnoj sumi. [4] Prema Međunarodnim računovodstvenim standardima (MRS) i Međunarodnim standardima finansijskog izveštavanja (MSFI) cilj finansijskih izveštaja opšte namene jeste pružanje informacija o finansijskom položaju, uspešnosti i tokovima gotovine pravnih lica. [5]

Predmet istraživanja su finansijske performanse banaka različitih kategorija. Posmatrajući vlasničku strukturu kapitala, može se videti disbalans između banaka u kojima dominira strani

vlasnički kapital, i onih u kojima je većinski domaći kapital. Banke sa većinskim domaćim kapitalom su specifične, jer su podložne kriznim situacijama. Istraživanja u ovom radu će to i potvrditi jer su pojedine banke analizirani krizni period jedva tržišno preživele.

Obuhvat istraživanja u ovom radu, odnosio se na 4 subjekta, odabranih na bazi polaznog kriterijuma uspešnosti poslovanja, tako da su dva subjekta iz kategorije banaka ino karaktera, a dva iz kategorije koji imaju karakter domaće banke. Klasterizacijom osnovnog skupa bankarskog sektora Srbije, a u svrsi validnog i pouzdanog procesa analize i poređenja, segmentiranjem su izdvojena dva manja homogena skupa banaka.

U prvom skupu su istaknute dve ino-banke, od kojih je prva Raiffeisen bank, i druga Erste bank, dok u drugom skupu su dve domaće banke, odnosno dve banke sa većinskim vlasničkim kapitalom Republike Srbije, od kojih je prva Komercijalna banka, a druga Agrobanka. Istraživački rad u fokus stavlja dinamiku kretanja finansijskih performansi navedenih subjekata u promenljivom okruženju, odnosno u okolnostima delovanja svetske ekonomske krize na području bankarskog sektora u Republici Srbiji.

Tabela 2: Vlasnička struktura kapitala bankarskog sektora Srbije u 2006.godini

| Redni broj | Poslovna godina | Element | Većinski strani kapital | Većinski domaći kapital |
|------------|-----------------|---------------------------------|-------------------------|-------------------------|
| 1. | 2006. | Broj banaka | 22 | 15 |
| 2. | | Učešće u ukupnoj bilansnoj sumi | 80% | 20% |
| 3. | | Učešće u ukupnom kapitalu | 67% | 33% |

Izvor: <http://www.ubs-asb.com/Default.aspx?tabid=538>

S obzirom na činjenicu da je valjanost analize finansijskog položaja i rentabilnosti uslovljena upotrebljivošću bilansnih podataka u svrhu analize, preuzeti su podaci sa sajta Narodne banke Srbije jer su sistematično prikazani finansijski izveštaji (bilansi stanja i uspeha) svih banaka, sastavljeni u skladu sa regulatornim okvirom finansijskog izveštavanja, te je to omogućilo podobnu racio analizu. U cilju izvođenja reprezentativnih zaključaka prikupljeni su podaci za vremenski interval ograničen na raspon od 31.12.2006. do 31.12.2009. koji su najpre bili predmet statističke analize, a zatim komparativne finansijske analize uspešnosti poslovanja, na osnovu kojih su dalje dati odgovarajući zaključci.

3. METODOLOŠKI APARAT

Analiza finansijskih izveštaja predstavlja metodološki proces putem kojeg se postupno dolazi do pojedinih i određenih zaključaka o finansijskom položaju i kvalitetu uspešnosti poslovanja banke. Generalno, posmatrano analiza finansijskih izveštaja sama po sebi predstavlja proces u kome se dolazi do konkretnih zaključaka o kvalitetu uspešnosti poslovanja i finansijskog položaja banke, kao subjekta privrednih aktivnosti u okviru određene zemlje. Može se reći da je jedan od osnovnih ciljeva analize da se identifikuju veće promene, odnosno prekretnice u kretanjima, iznosima i vezama između pojedinih bilansnih segmenata i stavki, kao i razlozi koji su doveli do tih promena. Prekretnice zapravo mogu da predstavljaju blagovremene znake upozorenja u pogledu značajnog zaokreta u pravcu uspešnog ili neuspešnog poslovanja, što i

jeste bitno u samom radu. [6] U ovom radu, istraživački postupak je uzrokovao i odabir naučnih metoda koje će biti korišćene, poput metoda korelacije koji je izuzetno pogodan. [7] Komparativna finansijska analiza, bavi se istraživanjem i kvantifikacijom relacija koje postoje između bilansnih pozicija, stanja i uspeha, sa ciljem da se omogući validna ocena finansijskog položaja i profitabilnosti posmatranog subjekta, u ovom slučaju banke. Takođe, korisnost finansijske analize se ogleda i u tome što mogu verodostojno da se procene buduće performanse. [5]

Prema navođenju Tešanovićeve, jedna od najrespektabilnijih metoda za analizu bankarskih finansijskih izveštaja jeste metoda analize putem racio brojeva. Racio, u analizi finansijskih izveštaja, predstavlja svaki broj koji pokazuje relaciju između dve vrednosti u godišnjim računima.[5] Racio brojevi nude mogućnost komparacije različitih sektora i aspekata poslovanja banaka.[6] Bitno je istaći da racio brojevi predstavljaju početnu osnovu kvalitetne finansijske analize, no njihova svrsishodnost dolazi do izražaja tek u situaciji kada se ispituju, upoređuju i tumače kroz postupak komparativne finansijske analize što i jeste suštinski postupak u konkretnom radu. Odnosno, analiza putem korišćenja finansijskih pokazatelja bavi se ispitivanjem odnosa između logički povezanih segmenata finansijskih izveštaja, u cilju da istaknu suštinske odnose potrebne za ocenu finansijskog položaja pravnog lica. S obzirom na konciznost samih indikatora, izračunavanje racio brojeva se u najvećem broju slučajeva temelji na podacima koji se crpe iz finansijskih izveštaja, te sam kvalitet istih bitno utiče na rezultate same analize. Racio brojevi, koji čine polaznu osnovu analize, u kombinaciji sa drugim indikatorima kreiraju temelj u proceni finansijskog položaja konkretne banke. Racia se obično iskazuju u vidu procenata, količnika ili razlomaka. [5]

U skladu sa tim, sistematičnim odabirom u metodološki aparat su uvrštene četiri grupe pokazatelja koji se koriste u procesu finansijske analize uspešnosti poslovanja banaka.

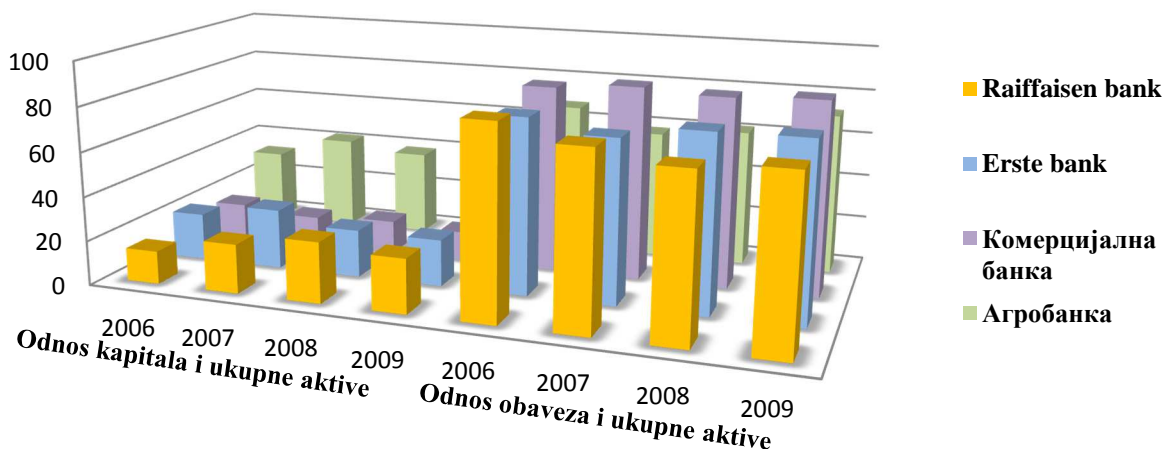
4. REZULTATI ISTRAŽIVANJA

Vrednosti indikatora su dobijene na osnovu obračuna podataka iz finansijskih izveštaja javno objavljenih od strane NBS. [8]

Tabela 3: Pokazatelji finansijske strukture, finansijskog položaja (zaduženosti);

| Redni broj | | 1 | 2 | 3 | 4 |
|------------------|------|---------------------------------------|------------|--------------------|-----------|
| Banka | | Raiffaisen bank | Erste bank | Komercijalna banka | Agrobanka |
| INDIKATOR | | ODNOS KAPITALA I UKUPNE AKTIVE | | | |
| Poslovna godina | 2006 | 14,83 | 21,204 | 15,65 | 32,44 |
| | 2007 | 22,14 | 26,9815 | 13,02 | 42,13 |
| | 2008 | 27,35 | 21,4237 | 14,89 | 38,46 |
| | 2009 | 24,41 | 21,0238 | 13,29 | 27,95 |
| INDIKATOR | | ODNOS OBAVEZA I UKUPNE AKTIVE | | | |
| Poslovna godina | 2006 | 85,17 | 78,796 | 84,35 | 67,56 |
| | 2007 | 77,86 | 73,0182 | 86,98 | 57,87 |
| | 2008 | 72,65 | 78,5763 | 85,11 | 61,54 |
| | 2009 | 75,59 | 78,9762 | 86,71 | 72,05 |

Grafikon 1: Pokazatelji finansijske strukture, finansijskog položaja (zaduženosti)



5. ZAKLJUČNA RAZMATRANJA

Na osnovu prikazanog zaključujemo da su Raiffaisen bank-a i Komercijalna banka, koje je pratila Erste bank-a, u posmatranom vremenskom periodu koji je ograničen na period od 2006. zaključno sa 2009. godinom, u uslovima pre, u toku, i nakon izbijanja finansijske krize, beležile više vrednosti opštih pokazatelja, i imale povoljniju finansijsku strukturu, u odnosu na Agrobanku.

Takođe, uočava se da je stabilnost finansijskog sistema uprkos tome što je bila ugrožena nepovoljnim makroekonomskim kretanjima, koja su bila odraz indirektnih izloženosti Srbije efektima globalne finansijske krize, očuvana tokom 2008. godine. Posledica delovanja faktora eksterne prirode (finansijska kriza), i lokalnog karaktera (snažan inflatorni pritisak tokom godine, depresijacija kursa dinara) osujetio je realni rast osnovnih indikatora finansijske sigurnosti bankarskog sektora Srbije, do nivoa održivog rasta ranijih godina, sa fokusom na nivo iz 2007. godine. Posmatrajući celokupni bankarski sektor Republike Srbije, može se zaključiti da su subjekti istog završili poslovnu 2008. godinu sa relativno pozitivnim finansijskim rezultatom. Analitički pristup ostvarenom rezultatu ukazuje na neke bitne segmente njegove strukture, te se izdvaja element nedovoljne efikasnosti upotrebe sredstava, koja se ujedno odražava i na rentabilnost sektora, obzirom na i dalje niske stope prinosa na ukupno angažovana sredstva (1,97%) i na sopstveni kapital (8,3%), koje je bankarski sektor Srbije iskazao na kraju 2008. godine.

Uprkos brojnim izazovima finansijske i ekonomske krize, u okolnostima gde je primetan pad inostrane i domaće agregatne tražnje, pored usporavanja kreditne aktivnosti i stranih direktnih investicija, osnovni indikatori finansijske snage i stabilnosti bankarskog sektora Republike Srbije u 2009. godini beležili su blagi nominalni i realni međugodišnji rast, prema podacima koje je publikovala NBS.

Uprkos ovakvom kontekstu domaćeg i inostranog okruženja, bankarski sektor, kao najveći deo finansijskog sistema Republike Srbije očuvao je svoju stabilnost tokom 2009. godine zahvaljujući merama podrške Vlade Republike Srbije i Narodne banke Srbije, kao i zadovoljavajućom kapitalizovanosti banaka.

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OVERFUNDING IN CROWDFUNDING – FIRST EVIDENCE FOR STARTNEXT AND KICKSTARTER PROJECTS LAUNCHED BETWEEN 2013 AND 2015

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Abstract: *This study provides a first overview of the key project characteristics of over 5,700 European projects successfully overfunded by crowds on the platforms Startnext and Kickstarter in the time between 2013 and 2015. Overfunding describes the amount of additional funding founders can use beyond the prespecified funding goal of the project. The goal of this research is to offer general and industry specific information together with clear recommendations for founders on which platform to choose for their projects to succeed. In general, the level of overfunding in median equals to 8% of the funding goal amount on Startnext and 21% on Kickstarter, but varies to a high degree as indicated by the mean of 45% on Startnext and 224% on Kickstarter. Based on presented differences between Startnext and Kickstarter, founders can decide for an appropriate project placement and prepare budgets accordingly.*

Keywords: *Crowd, Crowdfunding, Overfunding, Startnext, Kickstarter.*

INTRODUCTION

The provision of financing for ideas and entrepreneurial projects is often the biggest challenge for individuals, startups and small and medium-sized enterprises (SMEs). Crowdfunding offers a new financing solution in which a group of investors – the crowd – provides project financing by giving small amounts of money. Founders of European projects, however, often do not know which platform to choose for their projects to succeed [1].

This study provides a first overview of the key project characteristics of over 5,700 European projects successfully overfunded by crowds on the platforms Startnext and Kickstarter in the time between 2013 and 2015. Overfunding describes the amount of additional funding founders can use beyond the prespecified funding goal of the project. The goal of this research is to offer general and industry specific information together with clear recommendations for founders on which platform to choose for their projects to succeed. A high level of overfunding identified for a particular platform, can be potentially interesting for founders having innovative ideas and looking for much more money faster as planned. Overfunding can be also highly beneficial in terms of increased project publicity or higher products or services sales [2]. In contrast, a high level of overfunding might signal to funders potential delivery problems caused by high demand for a promised product.

The goal of this study is to analyze and compare the overfunding levels in successfully crowdfunded European projects from Startnext and Kickstarter platforms. For the purposes of this study a sample of 5,700 successfully funded European projects (hand-collected) is used. In

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particular, the information on the following variables is collected: project category (i.e. Art, Technology etc.), initial funding goal, funding and funding period (start and end).

Overall, this study adds to the growing body of literature on drivers of success determining the level of overfunding, e.g. Gerber et al. [3], Malave [4], Frydrych et al. [5], Haas et al. [6], Mollick [7], Kuo [8] and Koch [9], but addresses the topic with a more general approach applied to samples stemming from two important platforms. The comparison reveals important differences which might be potentially interesting for regionally and internationally acting investors, SMEs, founders and their advisors.

The rest of the paper proceeds as follows. Section 2 presents a brief background on the topic of crowdfunding based on recent literature, while data are presented in section 3. Section 4 shows the results of the analyzes of European projects' key characteristics with the associated implications for project founders. Section 5 concludes the paper.

BACKGROUND ON CROWDFUNDING AND RELATED LITERATURE

Although some publications refer to overfunding as a phenomenon of crowdfunding (Malave [10]; Mollick [11]; Barbi and Bigelli, [12]; Gabison [13]; Frydrych et al. [14]), research has not yet investigated the precise reasons sufficiently [15]. Crowdfunding platforms are intermediaries in two-sided markets bringing together project founders searching for funding and funders willing to provide money [16]. In other words, crowdfunding means that many people contribute small amounts of money, typically via the internet and social networks to fund a project. Crowdfunding is also often used for the initial financing of innovative ideas in very early stages or unusual projects which are seldom covered by business angel investors or venture capitalists [17]. Agrawal et al. [18] adds that compared to other more traditional ways of financing crowdfunding is a possibility to get funds cheaper.

Generally, crowdfunding can be categorized into four types [19], which are donation-based crowdfunding (where funders do not receive any rewards for their contributions), reward-based (where funders receive goods or services in exchange for their contributions), lending-based (where funders receive an attractive interest payment in exchange for financing a project) and equity-based (where funders receive shares in the financed venture in exchange for their contributions). On various donation- and reward-based crowdfunding platforms some projects do not only reach the funding goal, but also exceed it to a large extent. These projects receive a funding that is higher than their defined funding, while other projects fail to reach their funding goal [20]. Frydrych et al. [21] called a project "overfunded" in the moment, since its funding exceeds the funding goal, however, Mollick [22] uses the term when a project's funding is considerably higher than its funding goal.

At the moment, there are more than 2,000 crowdfunding platforms online worldwide. All those platforms have the same motivation, namely to provide contracts, advice and support for the implementation of crowdfunding projects with the help of technology and standardized processes [23]. Nevertheless, they are aligned to different topics/categories and differ in their geographical reach. For this study, we used projects from the platforms Kickstarter and Startnext. Kickstarter is operating worldwide with 15,638,847 supporters who pledged a total amount of \$ 4,063,328,858 for 156,243 successful projects until 2018. Startnext is focused on German speaking countries with a total pledged amount of €60,966,209 over 6,730 successful projects and more than 1,050,000 supporters by the end of 2018.

DATA AND METHODOLOGY

This study focuses on the overfunding of over 5,714 European projects successfully funded by crowds on the platforms Startnext and Kickstarter in the time between 2013 and 2015. The hand-collected sample from Startnext contains 1,865 records from 22 categories, while the dataset from Kickstarter contains 3,849 records belonging to 13 categories. The funding goals and funding amounts of projects from Kickstarter platform are translated into Euro amounts by applying the respective average exchange rate in a year.

For comparison purposes, we used 4,310 records from the following common 10 categories: Art, Comics, Design, Fashion, Games, Journalism, Music, Photography, Technology and Video. For the following Wilcoxon-rank-sum-tests, we chose five independent characteristics common for projects stemming from both platforms: funding goal (in €), funding (in €), overfunding (in €), overfunding (in % of the initial funding goal) and campaign duration (in days). Table 1 shows a general overview of the data. Results from Wilcoxon-rank-sum tests suggest that projects seem to significantly differ in terms of funding goals, funding amounts, overfunding and length of campaign duration across the categories. In particular, the funding and in direct consequence overfunding significantly differ for most project categories when comparing these two donations and reward-based platforms.

Table 1: Startnext and Kickstarter projects – a general overview of the sample

| | | N | Mean | Median | SD | MIN | MAX | WRS [Prob> z] |
|--------------------|---------------------|-------|--------|--------|---------|-----|-----------|----------------|
| Startnext | Funding Goal (in €) | 1 865 | 6 849 | 4 500 | 9 332 | 100 | 125 000 | |
| | Funding (in €) | 1 865 | 8 365 | 5 045 | 13 454 | 151 | 208 662 | |
| | Overfunding (in €) | 1 865 | 1 515 | 305 | 6 608 | 0 | 149 755 | |
| | Overfunding (in %) | 1 865 | 0.45 | 0.08 | 8.11 | 0 | 342 | |
| | Duration (days) | 1 865 | 47 | 43 | 21.24 | 3 | 181 | |
| Kickstarter | Funding Goal (in €) | 3 849 | 9 671 | 2 793 | 24 089 | 1 | 744 306 | |
| | Funding (in €) | 3 849 | 23 004 | 4 137 | 103 941 | 1 | 3 217 126 | |
| | Overfunding (in €) | 3 849 | 13 332 | 497 | 91 765 | 0 | 3 044 912 | |
| | Overfunding (in %) | 3 849 | 2.24 | 0.21 | 27.46 | 0 | 1 275 | |
| | Duration (days) | 3 849 | 31 | 30 | 10.24 | 2 | 74 | |
| Total | Funding Goal (in €) | 5 714 | 8 751 | 3 500 | 20 519 | 1 | 744 306 | 0.0000 |
| | Funding (in €) | 5 714 | 18 226 | 4 493 | 85 924 | 1 | 3 217 126 | 0.0000 |
| | Overfunding (in €) | 5 714 | 9 476 | 416 | 75 609 | 0 | 3 044 912 | 0.0000 |
| | Overfunding (in %) | 5 714 | 1.66 | 0.15 | 23.02 | 0 | 1 275 | 0.0000 |
| | Duration (days) | 5 714 | 37 | 30 | 16.62 | 2 | 181 | 0.0000 |

RESULTS

The results of the Wilcoxon-rank-sum tests applied for each industry category separately, show some similarities for seven out of ten categories, while three of them are totally different in terms of project characteristics. Table 2 shows the results of Wilcoxon-rank-sum tests for all ten categories.

Table 2: Results (p-values) of Wilcoxon-rank-sum tests applied for every industry category separately.

| | Art | Comics | Design | Fashion | Games | Journalism | Music | Photography | Technology | Video |
|---------------------|--------|--------|--------|---------|--------|------------|--------|-------------|------------|--------|
| Funding Goal (in €) | 0.0006 | 0.3430 | 0.0715 | 0.7235 | 0.5222 | 0.0021 | 0.0000 | 0.4440 | 0.1599 | 0.0000 |
| Funding (in €) | 0.0845 | 0.0218 | 0.0003 | 0.2657 | 0.0080 | 0.0039 | 0.0000 | 0.8235 | 0.0089 | 0.0000 |
| Overfunding (in €) | 0.0001 | 0.0000 | 0.0000 | 0.0959 | 0.0008 | 0.5487 | 0.0000 | 0.0030 | 0.0002 | 0.0000 |
| Overfunding (in %) | 0.0000 | 0.0003 | 0.0000 | 0.0427 | 0.0023 | 0.0796 | 0.8483 | 0.0000 | 0.0001 | 0.0477 |
| Duration (days) | 0.0000 | 0.1674 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.0000 |

Industry Categories without Similarities. In the categories art, design and video, projects significantly differ regarding every project characteristic. In these categories, the level of project overfunding on the Kickstarter platform lies within the range of 8% to 63% and on Startnext within the range of 4% to 13%. The median project duration in all these categories is longer up to 17 days on Startnext platform. As shown in Table 3, in these categories in total 1,561 projects are compared. The smallest number of 201 projects is observable for the design category, while the largest number of 767 projects is visible for the art category. The highest amount of overfunding on Startnext €149,755 is almost ten times smaller than on Kickstarter with €1,419,869.

Table 3: Categories without similarities: art (a), design (d) and video (v)

| | N | | | Mean | | | Median | | | Min | | | Max | | | WRST | | | |
|-----------------|---------------------|-----|-----|----------|----------|----------|----------|----------|----------|----------|-----|-----|------|--------|----------|----------|--------|--------|--------|
| | a | d | v | a | d | v | a | d | v | a | d | v | a | d | v | a | d | v | |
| Startnext | Funding Goal (in €) | 112 | 49 | 231 | 3841.036 | 7677.265 | 10275.85 | 2500 | 4250 | 7500 | 200 | 500 | 500 | 18000 | 50000 | 125000 | | | |
| | Funding (in €) | 112 | 49 | 231 | 4155.509 | 9199.959 | 12007.85 | 26345 | 4881 | 8097 | 212 | 500 | 1084 | 18720 | 66751 | 165755 | | | |
| | Overfunding (in €) | 112 | 49 | 231 | 314.4732 | 1522.694 | 1732 | 90 | 427 | 521 | 0 | 0 | 0 | 4075 | 16751 | 149755 | | | |
| | Overfunding (in %) | 112 | 49 | 231 | .1138226 | .2055842 | .2239233 | .0427619 | .132 | .0705 | 0 | 0 | 0 | 1.33 | .932 | 9.359687 | | | |
| Duration (days) | 112 | 49 | 231 | 42.22321 | 43.63265 | 51.5671 | 38 | 39 | 47 | 4 | 9 | 11 | 91 | 92 | 103 | | | | |
| Kickstarter | Funding Goal (in €) | 655 | 152 | 362 | 4312.354 | 16780.03 | 6863.80 | 1378 | 6889 | 2480 | 1 | 90 | 1 | 137771 | 199000 | 150546 | | | |
| | Funding (in €) | 655 | 152 | 362 | 6879.377 | 56559.26 | 10115.24 | 2080 | 11871.5 | 2788.5 | 2 | 175 | 1 | 339593 | 1618869 | 474233 | | | |
| | Overfunding (in €) | 655 | 152 | 362 | 2567.023 | 39779.22 | 3251.436 | 211 | 2792.5 | 174.5 | 0 | 0 | 0 | 312039 | 1419869 | 323687 | | | |
| | Overfunding (in %) | 655 | 152 | 362 | 3.445566 | 2.047285 | .4239076 | .1693548 | .6307947 | .0869449 | 0 | 0 | 0 | 1275 | 36.27236 | 21 | | | |
| Duration (days) | 655 | 152 | 362 | 29.72824 | 32.67105 | 30.22099 | 30 | 30 | 30 | 2 | 9 | 3 | 60 | 60 | 74 | | | | |
| Total | Funding Goal (in €) | 767 | 201 | 593 | 4243.531 | 14560.95 | 8192.948 | 1505 | 5000 | 4133 | 1 | 90 | 1 | 137771 | 199000 | 150546 | 0.0006 | 0.0715 | 0.0000 |
| | Funding (in €) | 767 | 201 | 593 | 6481.628 | 45013.96 | 10852.5 | 2190 | 941 | 4801 | 2 | 175 | 1 | 339593 | 1618869 | 474233 | 0.0845 | 0.0003 | 0.0000 |
| | Overfunding (in €) | 767 | 201 | 593 | 2238.098 | 30453 | 2659.548 | 189 | 1720 | 260 | 0 | 0 | 0 | 312039 | 1419869 | 323687 | 0.0001 | 0.0000 | 0.0000 |
| | Overfunding (in %) | 767 | 201 | 593 | 2.959053 | 1.598313 | .3460048 | .1414752 | .3618771 | .0798258 | 0 | 0 | 0 | 1275 | 36.27236 | 21 | 0.0000 | 0.0000 | 0.0477 |
| Duration (days) | 767 | 201 | 593 | 31.5528 | 35.34328 | 38.53626 | 30 | 31 | 30 | 2 | 9 | 3 | 91 | 92 | 103 | 0.0000 | 0.0000 | 0.0000 | |
| Total | 1561 | | | | | | | | | | | | | | | | | | |

Industry Categories with Similarities in Overfunding. For the categories journalism and music, projects show similar overfunding levels. In the journalism category, the median amount of overfunding €277 is similar for Startnext (€274) and Kickstarter (€295). In the music category, a similar relative overfunding percentage lies within the range of medians varying from 12,2% to 12,6% (12,4% in total) for both platforms. The median project duration lies within the range of 42 to 46 days on Startnext and is essentially higher than on Kickstarter with 30 days. As shown in Table 4, in these categories in total 1,036 projects are compared, 164 projects in the journalism and 872 in the music category. The highest amount of overfunding on Startnext with €103,461 is significantly higher than on Kickstarter with €55,552 and obtained during longer project durations on Startnext (120 days) as compared to Kickstarter's 61 days.

Table 4: Categories with Similarities in Overfunding: journalism (j) and music (m)

| | | N | | Mean | | Median | | Min | | max | | WRST | |
|--------------|---------------------|-----|-------------|----------|----------|----------|----------|-----|------|----------|--------|--------|--------|
| | | j | m | j | m | j | m | j | m | j | m | j | m |
| Startnext | Funding Goal (in €) | 72 | 427 | 7215.958 | 6713.799 | 4495 | 4800 | 100 | 750 | 115000 | 55000 | | |
| | Funding (in €) | 72 | 427 | 8696.75 | 8350.241 | 5049.5 | 5288 | 151 | 1101 | 125225 | 158461 | | |
| | Overfunding (in €) | 72 | 427 | 1480.792 | 1636.443 | 274 | 535 | 0 | 0 | 34194 | 103461 | | |
| | Overfunding (in %) | 72 | 427 | 5.099777 | .2417698 | .0892841 | .1264 | 0 | 0 | 341.94 | 3.3306 | | |
| | Duration (days) | 72 | 427 | 42.76389 | 52.11944 | 42.5 | 46 | 8 | 12 | 92 | 120 | | |
| Kickstarter | Funding Goal (in €) | 92 | 445 | 6134.152 | 6533.09 | 2186.5 | 2067 | 12 | 1 | 58875 | 65940 | | |
| | Funding (in €) | 92 | 445 | 8175.152 | 8287.022 | 2521 | 2755 | 14 | 1 | 82533 | 77094 | | |
| | Overfunding (in €) | 92 | 445 | 2041 | 1753.933 | 295 | 220 | 0 | 0 | 48780 | 55552 | | |
| | Overfunding (in %) | 92 | 445 | .5273847 | 3.744803 | .1293421 | .122449 | 0 | 0 | 10.81618 | 825 | | |
| | Duration (days) | 92 | 445 | 29.3913 | 33.72809 | 30 | 30 | 5 | 2 | 61 | 61 | | |
| Total | Funding Goal (in €) | 164 | 872 | 6609.091 | 6621.579 | 3000 | 4000 | 12 | 1 | 115000 | 65940 | 0.0021 | 0.0000 |
| | Funding (in €) | 164 | 872 | 8404.146 | 8317.979 | 3407 | 4692 | 14 | 1 | 125225 | 158461 | 0.0039 | 0.0000 |
| | Overfunding (in €) | 164 | 872 | 1795.055 | 1696.4 | 277.5 | 380 | 0 | 0 | 48780 | 103461 | 0.5487 | 0.0000 |
| | Overfunding (in %) | 164 | 872 | 2.534776 | 2.029441 | .1104047 | .1244962 | 0 | 0 | 341.94 | 825 | 0.0796 | 0.8483 |
| | Duration (days) | 164 | 872 | 35.2622 | 42.73394 | 31 | 36 | 5 | 2 | 92 | 120 | 0.0000 | 0.0000 |
| Total | | | 1036 | | | | | | | | | | |

Industry Categories with Similar Funding, but Different Overfunding Levels. As shown in Table 5, in categories with similar funding goals, funding amounts and durations in total 757 projects are compared. Besides that, 240 projects in the comics, 335 projects in the fashion and 182 in the music category are analyzed. For the categories fashion and photography projects launched on Startnext and Kickstarter have a comparable funding goal (€5,000 in fashion and 2,810 in photography) and funding (€6,544 in fashion and €3,203 in photography), but reach in significantly shorter campaign duration (30 days) a higher level of overfunding (up to 16%) on Kickstarter. In the comics category, projects launched on Startnext and Kickstarter have a comparable funding goal (€2000) and duration (30 days), but reach significantly higher funding amount (€3216) with a significantly higher overfunding level on Kickstarter (up to 39%). The highest amount of overfunding on Startnext with €38671 is significantly lower than on Kickstarter with €363,951. However, the longest campaign on Startnext lasted 93 days which is more than 50% longer than on Kickstarter (60 days).

Table 5: Categories with Similarities in Funding Goal, Funding and Duration: comics (c), fashion (f) and photography (p)

| | | N | | | Mean | | | Median | | | Min | | | Max | | | WRST | | |
|--------------|---------------------|-----|-----|------------|----------|----------|----------|----------|----------|----------|------|-------|-----|---------|----------|----------|--------|--------|--------|
| | | c | f | p | c | f | p | c | f | p | c | f | p | c | f | p | c | f | p |
| Startnext | Funding Goal (in €) | 25 | 63 | 72 | 2844.96 | 6713.492 | 5868.042 | 1500 | 5000 | 3250 | 500 | 400 | 100 | 20000 | 60000 | 100000 | | | |
| | Funding (in €) | 25 | 63 | 72 | 3258.24 | 8739.333 | 6514.167 | 1643 | 5730 | 3477 | 653 | 411 | 230 | 20132 | 73819 | 122714 | | | |
| | Overfunding (in €) | 25 | 63 | 72 | 413.28 | 2025.841 | 646.125 | 146 | 376 | 151.5 | 6 | 1 | 0 | 5576 | 38671 | 22714 | | | |
| | Overfunding (in %) | 25 | 63 | 72 | .2138698 | .3166534 | .1072936 | .0885714 | .1312 | .0464615 | .006 | .0007 | 0 | 1.1152 | 2.695625 | 1.3 | | | |
| | Duration (days) | 25 | 63 | 72 | 45.96 | 44.33333 | 49.13889 | 32 | 39 | 44 | 16 | 15 | 10 | 92 | 90 | 93 | | | |
| Kickstarter | Funding Goal (in €) | 215 | 272 | 110 | 4485.674 | 9138.085 | 6544.873 | 2067 | 5250 | 2590.5 | 29 | 6 | 41 | 49000 | 100000 | 96440 | | | |
| | Funding (in €) | 215 | 272 | 110 | 7507.698 | 17337.22 | 12229.96 | 3216 | 7257 | 2951.5 | 126 | 91 | 131 | 66422 | 326675 | 460391 | | | |
| | Overfunding (in €) | 215 | 272 | 110 | 3022.023 | 8199.14 | 5685.091 | 727 | 724.5 | 428 | 0 | 0 | 0 | 42731 | 298741 | 363951 | | | |
| | Overfunding (in %) | 215 | 272 | 110 | 1.067393 | 1.073235 | .6033576 | .3946731 | .1662926 | .1471132 | 0 | 0 | 0 | 17.2233 | 28.33333 | 12.41463 | | | |
| | Duration (days) | 215 | 272 | 110 | 31.69767 | 31.38235 | 31.87273 | 30 | 30 | 30 | 2 | 4 | 2 | 60 | 60 | 60 | | | |
| Total | Funding Goal (in €) | 240 | 335 | 182 | 4314.767 | 8682.116 | 6277.115 | 2000 | 5000 | 2810 | 29 | 6 | 41 | 49000 | 100000 | 100000 | 0.3430 | 0.7235 | 0.4440 |
| | Funding (in €) | 240 | 335 | 182 | 7065.046 | 15720.31 | 9968.769 | 2989 | 6544 | 3203 | 126 | 91 | 131 | 66422 | 326675 | 460391 | 0.0218 | 0.2657 | 0.8235 |
| | Overfunding (in €) | 240 | 335 | 182 | 2750.279 | 7038.191 | 3691.654 | 584 | 657 | 225.5 | 0 | 0 | 0 | 42731 | 298741 | 363951 | 0.0000 | 0.0959 | 0.0030 |
| | Overfunding (in %) | 240 | 335 | 182 | .9784842 | .9309527 | .4071125 | .3448871 | .1556 | .0924807 | 0 | 0 | 0 | 17.2233 | 28.33333 | 12.41463 | 0.0003 | 0.0427 | 0.0000 |
| | Duration (days) | 240 | 335 | 182 | 33.18333 | 33.81791 | 38.7033 | 30 | 30 | 31 | 2 | 4 | 2 | 92 | 90 | 93 | 0.1674 | 0.0000 | 0.0000 |
| Total | | | | 757 | | | | | | | | | | | | | | | |

As shown in Table 6, in categories with similar funding goals in total 956 projects are compared (407 projects in the games and 549 projects in the technology category). For these categories projects launched on Startnext and Kickstarter have a comparable funding goal (€5,511 in games and €10,000 in technology) but reach in significantly shorter campaign duration (30 days) a higher level of overfunding (up to 73%) on Kickstarter. The highest amount of overfunding on Startnext with €49,720 is significantly lower than on Kickstarter with

€3,044,912. The best project on Kickstarter multiplied the funding goal over 364 times compared to a Startnext project with 5 times.

Table 6: Categories with Similarities in Funding Goals: games (g) and technology (t)

| | N | | Mean | | Median | | Min | | max | | WRST | | |
|--------------|---------------------|-----|------|----------|----------|----------|----------|---------|----------|-----------|----------|--------|--------|
| | g | t | g | t | g | t | g | t | g | t | g | t | |
| Startnext | Funding Goal (in €) | 39 | 26 | 6765.872 | 12157.31 | 5980 | 7375 | 180 | 500 | 26000 | 77700 | | |
| | Funding (in €) | 39 | 26 | 10659.69 | 17872.62 | 6796 | 7850 | 521 | 520 | 58150 | 101431 | | |
| | Overfunding (in €) | 39 | 26 | 3893.821 | 5715.308 | 1045 | 344.5 | 1 | 1 | 40650 | 49720 | | |
| | Overfunding (in %) | 39 | 26 | .6834694 | .4193835 | .2712222 | .0741114 | .000303 | .0011765 | 5.1663333 | 4.972 | | |
| | Duration (days) | 39 | 26 | 51.89744 | 58.76923 | 46 | 55.5 | 14 | 24 | 92 | 93 | | |
| Kickstarter | Funding Goal (in €) | 368 | 523 | 12658.81 | 27416.6 | 5511 | 10000 | 1 | 1 | 241100 | 744306 | | |
| | Funding (in €) | 368 | 523 | 46535.06 | 73521.54 | 12126.5 | 23344 | 19 | 15 | 2879566 | 3217126 | | |
| | Overfunding (in €) | 368 | 523 | 33876.25 | 46104.94 | 3845 | 5116 | 0 | 0 | 2638466 | 3044912 | | |
| | Overfunding (in %) | 368 | 523 | 3.525972 | 3.609717 | .733557 | .5560651 | 0 | 0 | 123 | 364.6626 | | |
| | Duration (days) | 368 | 523 | 30.52717 | 32.18547 | 30 | 30 | 6 | 7 | 60 | 60 | | |
| Total | Funding Goal (in €) | 407 | 549 | 12094.13 | 26693.94 | 5511 | 10000 | 1 | 1 | 241100 | 744306 | 0.5222 | 0.1599 |
| | Funding (in €) | 407 | 549 | 43097.37 | 70886.07 | 11507 | 20774 | 19 | 15 | 2879566 | 3217126 | 0.0080 | 0.0089 |
| | Overfunding (in €) | 407 | 549 | 31003.24 | 44192.13 | 3455 | 4785 | 0 | 0 | 2638466 | 3044912 | 0.0008 | 0.0002 |
| | Overfunding (in %) | 407 | 549 | 3.253595 | 3.458627 | .6307172 | .5225312 | 0 | 0 | 123 | 364.6626 | 0.0023 | 0.0001 |
| | Duration (days) | 407 | 549 | 32.57494 | 33.44444 | 30 | 30 | 6 | 7 | 92 | 93 | 0.0000 | 0.0000 |
| Total | 956 | | | | | | | | | | | | |

CONCLUSION

This study provides a first overview of the key project characteristics of over 5,700 European projects successfully overfunded by crowds on the platforms Startnext and Kickstarter in the time between 2013 and 2015. The aim of this research is to offer general and industry specific information together with clear recommendations for founders on which platform to choose for their projects to succeed. In general, the level of overfunding in median equals to 8% on Startnext and 21% on Kickstarter, but varies to a high degree, depending on the industry category, as indicated by the mean of 45% on Startnext and 224% on Kickstarter. Results from Wilcoxon-rank-sum tests suggest that in the categories art, design and video, projects significantly differ regarding every characteristic. In these categories the level of project overfunding is significantly higher on Kickstarter (up to 63%). The highest amount of overfunding on Kickstarter with €363,951 is almost ten times bigger than on Startnext and is reached in 30 days (47 days on Startnext) by a project from the photography category.

In the categories journalism and music, projects show similar overfunding characteristics. In the journalism category the median overfunding amount is €277, while in the music category the overfunding percentage equals to 12,4% of the initial funding goal in median for both platforms.

In the categories fashion and photography, projects show similar funding goals and funding amounts. Furthermore, the comics category proves similar funding goals and durations. Also, in these categories projects from Kickstarter reach in significantly shorter campaign duration (about 30 days) a higher level of overfunding (up to 16% of the initial funding goal). In the comics category, projects launched on Startnext and Kickstarter have a comparable funding goal of approx. €2,000 and duration of approx. 30 days, but reach significantly higher funding amount (€3,216) with a significantly higher overfunding level on Kickstarter (up to 39%). In the categories games and technology, projects show similar funding goal, but reach in significantly shorter campaign duration (30 days) a higher level of overfunding (up to 73%) on Kickstarter.

The results suggest, that funders and founders can reach a higher overfunding on Kickstarter for projects in almost all categories (except for the music category), a better possibility to receive a reward (for funders) or increase a selling or publicity (for founders) in shorter duration. Further research could take more crowdfunding platforms into account which would lead to a more detailed analysis of which platform to choose by founders or/and support by funders.

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FINANCIAL (I)LITERACY: DOES THE FINANCIAL ADVISOR HELP?

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Abstract: *Sustainable economic development and economic growth are the basis of a healthy economy. All advanced countries in the world are trying to ensure a healthy economy, and thus a long-standing position in macroeconomic comparisons, through using effective economic policies. In recent years, however, a serious problem exists in many developed countries that we can see as a macroeconomic problem. It is not just a problem of indebtedness of State (public debt), a major problem is the large indebtedness of households / individuals. Studies and analyzes suggest a new problem, and that is, probably, financial illiteracy. Slovakia, as a member state of many international organizations, is involved in programs to increase financial literacy, with the help of education programs at primary and secondary schools. Financial literacy is the ability to use the knowledge, skills and experience to effectively manage own financial resources to ensure lifetime security for yourself and your household. The financial market provides many different types of products, and the layman is hardly able to orient them. Therefore, the existence of financial advisor appears as one possible solution to this problem. The article deals with the definition of financial literacy, and with the definition of financial literacy it is an attempt to approach financial illiteracy. For the development of paper were used several scientific methods of investigation. We focused on evaluating our own financial literacy survey with high school graduates. The financial literacy test used by the selected consulting company was also used for our statistical data. For a better understanding of financial literacy testing used by a consulting company, research is complemented by an interview. Based on the findings of the research, recommendations are made for practice. The article deals with issues of financial literacy in Slovakia, but the conclusions are also applicable in other economies.*

Keywords: *financial advisor, financial literacy, mortgage, Slovakia, youngsters.*

1. INTRODUCTION

The OECD/INFE [1] defines financial literacy as: “A combination of awareness, knowledge, skills, attitude and behavior necessary to make sound financial decisions and ultimately achieve individual financial wellbeing.” Within the meaning of that definition is therefore important to pay attention to the youngsters as a group of individuals dealing with financial question on everyday basis – even if the sum of their daily transactions can’t be considered as influencing the State’s economy. The PISA 2015 survey has therefore focused on the young people’s financial literacy. Slovak students’ performance has been very

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low comparing to other OECD countries. Students are able to make very simple decisions in their daily spending, to know the purpose of an invoice and the difference between needs and wants, but sadly more complex tasks are too difficult for most of them [2]. If the students don't learn to pay attention to their finance, how can they later consider for instance to purchase a mortgage?

2. LITERATURE REVIEW

Financial literacy is not just a phenomenon of our time. Decisions on the use of funds have been made in the past, are being done today and will be done in the future. People make a lot of important decisions every day. People need different competencies / skills to make their decisions effective and right. Basic skills should be – to know how to:

create and maintain own or family budget. Managing the own personal budget and managing family budget is not easy. There is a large number of offers on the market, and therefore it is necessary to manage and to be able to solve the financial problems.

Understand price formation. People need to know the basic process of price formation. Economic theory says that the market is the place where demand and supply meet together. Then price is made by a market. However, price is influenced by different variables. Each producer wants to achieve the highest profit. The customer also wants to get the most out of the market but with the optimal use of their financial options. The market represents a mechanism for realizing the interests of individual economic / market entities. It is a mechanism by which buyers and sellers work together to determine prices and quantities of goods and services.

The third competence should help second competence. People should be able to properly and effectively dispose of its funds.

Gathergood and Weber [3], in their study, identified a relationship between home-ownership or renting a house and financial literacy by young people. The ones with lower financial literacy take unfavorable loans and have more debts. Financial literacy among students of economic faculties in Slovakia increases between the first-year of their studies and their last one. The gender is doing a difference (men have a higher level of financial literacy) but attending a business oriented secondary or high school is not. [4] So, the education and financial literacy are linked together but it is not enough for an explanation. [5] For someone it is better to count on an advisor in case of financial decisions. But if the person-client is feeling anxious of a financial advisor his or hers likelihood of consulting a financial professional is in this case lower on the other hand, this anxiety could lead to self-studying or to improvement in one's financial literacy. [6] As mentioned women have a lower level of financial literacy in a robust overview on this issue Bucher-Koenen et al. [7] are highlighting two groups of women – singles and widowed that are most at risk. Johnson and Sherraden [8] consider what it would be like if all children in the school (from elementary school) would have their own saving account and learn how to manage it and maybe the parents could learn something too.

Lisý [9] states that people have “invented” money as a universal means of exchange for facilitating the economic cycle. The emergence and use of money have gone through great historical developments and progress - from commodity money through full money to incomplete money; from cash to cashless money. The importance of knowledge, information and innovation which are becoming the main drivers of growth, is growing sharply in the new economy. The increasing power of information and knowledge is changing the way people communicate but also change the trade and business. The offer is big, the money options are limiting and the right decision has to be made constantly. The financial market is large, the offer

to use funds is still growing. Whether people are financially literate or illiterate can greatly influence how they work with the funds.

The various institutions are engaged in analyzing financial literacy exploring how to influence, how to shape financial literacy. Ministry of Education, Science, Research and Sport of the Slovak Republic has analyzed the financial literacy, too. Financial literacy is defined, by mentioned ministry, “like the ability to use knowledge, skills and experience for effective management of personal funds with the aim to secure one’s lifelong financial security. Financial literacy is not an absolute state, it is the continuum of abilities that are conditioned by variables like age, family, culture or residence. Financial literacy represents the state of continuous development enabling each individual to effectively react on new events and continuously changing economic environment.” [10] Financial literacy is the ability to understand how money works and how someone manages money. More specifically, it refers to the set of skills and knowledge that allows an individual to make informed and effective decisions with all of their financial resources. Financial literacy creates demand for financial products and services, thereby accelerating the pace of financial inclusion as it enables the common man to understand the needs and benefits of the products and services offered.

In the Knowledge Economy Dictionary [11] we find the theory of financial literacy as “the ability to use knowledge, skills and experience to effectively manage own financial resources to ensure life-long financial security for one’s own and his household.” Despite the impossibility of stabilizing the definition of financial literacy, we can define its common attributes, which are in particular:

- the ability and the way people perceive banking products,
- the way they are used,
- the degree of management of their own finances.

Financial literacy can be defined as a set of three basic components: monetary literacy, price literacy and budget literacy. In addition to the three main constituents, the following are often mentioned in the literature: Information literacy, legal literacy and numeracy. Subsystems of financial literacy are - Financial knowledge, financial capability, and financial responsibility.

The financial market is part of the system of the economy and it is the heart of the financial system. It is considered to be the most important among all markets, mainly because of the fact that its resources are usable in every economic area. “The financial market is a system of relationships, institutions and instruments that allow the accumulation and deployment of temporarily free funds between economic entities on the basis of supply and demand relationships.” [12] The base of the financial market is to create channels that allow the transfer of funds from entities that they have in excess to operators who are in deficit. The movement of funds takes place in two forms, direct or indirect financing. Indirect funding is based on the existence of financial intermediaries such as commercial banks, insurance companies, investment institutions, asset management companies and other financial intermediaries such as financial companies, securities traders and others. [13]

3. METHODOLOGY AND DATA

We summarize findings from three different surveys on financial literacy. As the data are different, and there was not the same questionnaire used, we would like to highlight some of the findings from the different surveys:

- Online screening questionnaire (416 respondents),

- Secondary school graduate students (total of 216 students),
- Financial advisor cases of adult clients (total of 44 cases).

The online questionnaire was a part of a dissertation theses research and the data were obtained from the respondents during the year 2016 [14]. The respondents were asked to answer 10 multiple choice questions. For the group of secondary school graduate students, the data were collected in the first half of the year 2018. Students were asked to submit their answers via an online questionnaire. The questionnaire had 29 questions and was a part of a Diploma Thesis research project. [15] The Financial advisor was asked to summarize his experience with his clients' financial literacy. The information about the clients included age, sex, relationship status, education and the Advisors opinion on the level of the clients' financial literacy.

4. RESULTS AND DISCUSSION

The financial market comprises a large number of banks, insurance companies, asset management, investment insurance companies and other institutions that may pose a chaos for the client in need of help with their finances. The solution is to find only one person, a financial adviser, or an intermediary who is oriented on the financial market. Financial intermediaries are found by clients in banks, insurance companies and other institutions. What is limiting in this case is the fact that such an advisor can only offer the client products from the portfolio of the institution that is his / her home or a partner company. The risk to the client is therefore the fact that he / she will be provided with a service that is appropriate and optimal but may not be the best one. [19] Another situation occurs when the client searches for a private financial agent. The financial agent works with a larger number of institutions, its portfolio of products is much more extensive than the financial intermediary in the bank, and therefore the choice to choose the most appropriate offer for the client is much more realistic. The definition of financial advisors reflects the fact that the relationship between the financial agent and the client is based on trust and combines consulting and other counseling activities. [16] It is also possible to distinguish financial adviser from a financial agent on the basis that agents provide financial services for commission from a financial institution while consultants provide them with fees from the client. Ing. Peter Krištofovič says: "Paid financial advice is, in my opinion, the highest level within our department, because it is possible to really generate high added value here." The financial adviser has several activities on the financial market. They are actively searching for new clients, long-term communication and maintaining relationships with an existing client, constantly gathering information about the financial market situation, management of various complaints and many other activities. [18] The financial intermediary can be also financial institution. There are several financial institutions acting as financial intermediaries. Financial intermediaries are divided into financial markets as follows:

- deposit institutions (commercial banks, savings banks),
- contractual institutions (insurance companies, pension funds),
- investment institutions (investment and asset management companies),
- Securities dealers,
- stock exchanges and over-the-counter markets,
- other financial intermediaries. [12]

Findings of the online questionnaire

The online questionnaire did provide a broader screening on financial literacy. The respondents were mostly university graduates (59.6%), and to 36 years old (89.4%), structure of respondents is dependent on the online provided method of questioning. On the other hand, for the needs of this paper the results are suitable. Respondents were asked to answer 10 multiple choice

questions. Of the total number of 416 respondents, the minimum and higher number of correct answers was reached by 308 respondents (74%). Based on the results of the questionnaire, we can state that the overall level of knowledge of the respondents is good. 16.3% of respondents cannot identify which loan has better conditions, means that 37.50% decided just according to the high of the installment. By total credit costs 23.1% of respondents considered the interest rate as the main parameter of the total cost of the loan. In the University degree group one fifth of the respondents were not been able to accurately determine what impact the inflation has had on their investments.

Findings in the group of secondary school graduates

Graduates of Secondary schools were asked to answer 29 questions in an online questionnaire. According to the findings, 65% of the graduates knows what the term financial literacy means. In 68% of the cases the graduates had at least one subject in which they learn about finance (36% Economy, 17% Accounting and 47% in the subject called “Civic education”). The main findings are that the graduates don’t know the difference between costs and returns, just one fifth of them knew the correct answer. They don’t know the difference between a credit card and a debit card (62%). And they take no difference between the available balance on the account and the current account balance (64%). But they do understand what inflation or a standing order is. Graduates also know who creditor and debtor are. The results are not ambiguous. Students lack a full financial education. They know the common terms but as the tasks become complicated, they can’t connect the information and decide the optimal (in our case the right) answer.

Findings in the group of financial advisors’ clients

The financial advisor did provide a short overview of his clients. The total was 44 clients, 17 females (average 33.9 years old), 27 males (average 34.4 years old). All of the clients have contacted the Advisor freely with needed advises in fields of advice vary between mortgage to retirement savings. According to the Advisor, not a single one of the clients was financial literate. So, we can say even if the client is seen as well educated – university degree (63.7%), this is not yet a prerequisite for being financially literate. These finding could indicate that clients are not anxious to contact an advisor by their financial decisions.

5. CONCLUSIONS

Financial literacy is still discussed and broadly marginalized topic of interest. In our summarized findings we assume that even if the Secondary school graduates have one to several experiences with topics including basic finance knowledge, they can’t use them in more complex tasks. For the older respondents the main financial indicators in mortgage decision are not on a satisfying level. Therefore, we see the contact to a financial advisor as a good first step for them in terms of gaining the information needed before they made the decision. Due to the large number of products many people can be classified as more or less financially illiterate. Financial illiteracy means a situation in which people do not understand financial terms and risks, they lack the knowledge to make effective decisions in a whole range of financial contexts. The financial situation does not improve people, but it gets worse and the economic life is getting worse. Financial illiteracy is not the end, and financial education can be improved. A financial intermediary serves as a subject who, through his knowledge and skills, can help understand the market and the various financial products and offers. The profession of financial advisor, if executed responsibly, has a positive impact on the financial market and great benefit for clients. At first glance, there may seem to be a lot of financial advisors on the market today. [20] However, the reality is different and there is only a small fraction of consultants who stay

on the market for a long time, that are searched for by clients and are beneficial to them. Financial advisors are different, some take the job as an opportunity to earn extra income besides a primary job, but a much larger number of financial advisers are aware of the importance of the profession and perform it fully for all their working time. It is necessary to realize that financial advice does not work for everyone. If a financial advisor wants to succeed in the long term, he must be able to pass on to clients. It should be the rule that it is not important for the counselor how much time he spends at work, but what he did during the job and what benefit he brought to his clients. A great benefit for the client and also for the financial adviser is the building a long-term relationship, which is about the beneficial cooperation for both sides. This model also has the advantage that, unlike other financial institutions that focus on one-off business and contract signing, the financial advisor monitors the client's finances in the long run, looks at its future development, is with the long-term client, during which provides his advice and service. The client gets expert advice about his finances from a specialist who knows the products of all institutions and is familiar with their benefits and risks, and the advisor gets a satisfied client whose positive reference is the key for expanding clients.

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DEPRECIATION TERMS AND METHODS AT COMPANY AND MACROECONOMIC LEVEL IN HUNGARY

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Abstract: *The term depreciation differs in the System of National Accounts from the accounting. Calculation and presentation of depreciation and amortization can also vary by accounting and tax systems. Our research aims to compare the depreciation terms and requirements of National Accounts with the of the Hungarian Accounting Act, the International Financial Reporting Standards (IFRS) and the Hungarian Corporate Tax Act. The presented accounting depreciation and amortization can vary due to the different recognition and measurement requirements, the applied accounting policy for fixed assets, determination of useful life, residual value and depreciation methods. The Corporate Tax Act uses the same terminology as the Accounting Act but calculates depreciation differently. The detected differences in the terminologies and methods at economic, accounting and taxation level can be derived from the different underlying purposes of the regulations. As a consequence of these the aggregated accounting or tax depreciation of companies does not reflect the economic depreciation.*

Keywords: *depreciation, IFRS, Hungarian Accounting Regulation, System of National Accounts*

1. INTRODUCTION

In Hungary, depreciation is calculated differently according to the rules of accounting, economics, and the corporate taxation since 1992, the effective date of the first Accounting Act 0. This difference was further pronounced with the spread of the International Financial Reporting Standards (IFRS) 0, which apply a measurement method that differs significantly from the Hungarian methods, influencing the depreciation basis of the assets and the amount of the profit before tax. IFRS amortization created, therefore, a further depreciation value in addition to the already-existing three values.

In the European Union, development is, however, a multidimensional concept. GDP is the generally applied indicator of economic output and it is calculated by determining, on the one hand, the total income of the operators of a given economy, and on the other hand, the total amount spent on products and services, as the two sides of an equation. This allows regions to be ranked based on their development (Mankiw, 2002).

The System of National Accounts 0 play a fundal role in the calculation of GDP, a common denominator which measures output in the macroeconomic accounts based on Keynesian

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concepts in a market context. GDP is one of the most common indicators, and the component we are studying comprises the various techniques used to measure non-housing investments in the business sector.

Even the application of GDP can divide experts. There has been a decades-long debate about whether development itself, a multidimensional concept with multiple indicators, can be boiled down to quantitative indicators. In addition, measurement results greatly depend on the spatial differences of a given region. For instance, inequality indicators have a higher value in a sub-region consisting of multiple towns, even if all the other characteristics are identical. Even the different sizes of sub-regions can affect the end result (Egri, 2017). The deviation of measurement results due to regional differences and the application of GDP per capita, an absolute indicator, lead to increasingly heated debate, yield different measurement results, and indicate different conceptual conclusions. Among others, Fagerber, 1987, Porter, 1998 and Krugman, 1991 0, are oft-cited experts who developed different hypotheses based on the same data.

Our research focuses on the measurement of the value of available goods, more specifically, we analyze the measurement of replacement. As it is, available production assets must be replaced. This is what depreciation reflects by demonstrating deterioration, a concept all financial disciplines interpret and calculate differently, as we will see. In our paper, we compare depreciation calculated when measuring GDP with the Hungarian Accounting Act 0 and IFRS providing the boundary conditions for business and the rules of corporate taxation, with some international outlook.

2. ECONOMIC DEPRECIATION

It was the proposition of the United Nations, the System of National Accounts (SNA) of 1953, which created a basis for the comparison of the system of national accounts. It has been amended several times since its introduction. EU Member States are obliged to apply Regulation (EU) No 549/2013 of the European Parliament and the Council, providing a methodology for Member States to recognize economic events in an identical manner and ensure their comparability 0 0.

Following the requirements of the EU Directive mentioned above, the statistical categorization divides economic assets into financial and non-financial assets. Non-financial assets held by entities can be divided into two further groups, produced and non-produced assets, where the latter can still be divided to in production used and non-used assets, both in terms of origin and Fixed assets used in production process and (among the goods that are also in production used but not produced) patents, know-how and licenses have measurement relevance for our topic. Whereas Hungarian taxation laws rely on the Accounting Act in determining and categorizing individual goods, we will also apply this aspect to compare the concepts of tangible assets and intangible assets in the Accounting Act with the concepts applied in the national accounts.

3. ACCOUNTING DEPRECIATION

According to the Hungarian Accounting Act 0, the depreciable amount can be the initial cost of the asset or the carrying amount which is the initial cost after deduction of accumulated depreciation and accumulated impairment. Fixed tangibles and intangibles can be revalued to

the higher market value but revaluation - on the contrary to IFRS 0 – it does not affect the depreciable amount of the asset and so the amount of depreciation.

The initial cost of an asset is the combined number of items individually linked to the asset and incurred for the purposes of acquiring, creating or commissioning that asset prior to its commissioning or delivery to the warehouse. The initial cost comprises the purchase price reduced by discounts and increased by surcharges, the consideration payable for transport, manipulation, foundation, installation, commissioning, and intermediary activities incidental to the procurement, commissioning and warehouse delivery of the assets, and the commission charges, taxes, parafiscal items, and customs charges.

IAS 16 and IAS 38 define cost as the amount of cash or cash equivalents paid or the fair value of the other consideration given to acquire an asset at the time of its acquisition or construction or, where applicable, the amount attributed to that asset when initially recognized in accordance with the specific requirements of other IFRSs.

The definition appears to be similar to the in the Hungarian Accounting Act. There are, however, some items that imply a different practice with respect to the basic principles defined in the standards and the requirements of the Accounting Act. From these we highlight the following:

For property, plant and equipment, IAS 16 requires the allocation of the amount initially recognized in respect of an item of property, plant and equipment to its significant parts. The Accounting Act, however, does not require this allocation. This is decisive for determining useful life, residual value, and the proper depreciation method.

IAS 16 requires that the initial estimate of restoration, dismantling, and removal costs be recognized in the cost of property, plant and equipment. The Accounting Act does not allow the capitalization of these costs. Therefore, it can cause a considerable difference in terms of cost of real estate and production equipment.

In determining the cost of purchased fixed assets, the Accounting Act gives priority to the invoiced price, irrespective of the payment deadline of the invoice. The initial cost calculated according to the Accounting Act may, therefore, include a financing element due to a long-term payment deadline. In any case, this is consistent with the requirements of the Accounting Act concerning the acquisition value of borrowing costs. Due to the Hungarian regulations concerning the recognition of cash discounts, the cost of an asset can have an element that is not paid for at all.

The Accounting Act regards the borrowing costs directly linked to the procurement and production of an asset as part of its acquisition value. By contrast, IAS 23 stipulates conditions for their inclusion in the initial cost and limits this only for qualifying assets.

The learning and training costs of a new technology can also account for a considerable amount in the cost of tangible or intangible assets. While the Accounting Act explicitly requires this for the cost of investments, IAS 16 and IAS 38 emphatically forbid their recognition as assets. The primary reason for this is that, though training directly contributes to the normal use of an asset, it is still not to be capitalized, because it does not meet the recognition requirements concerning assets.

The Accounting Act provides entities with a choice, to be made in their accounting policies, regarding the recognition of development costs as assets, contrarily to international standards where costs incurred in the development state must be capitalized.

The Accounting Act is less strict than the international accounting standards in terms of recognizing start-up and restructuring costs as assets.

According to the Accounting Act, the starting date of depreciation is the date of commissioning, i.e. when the use for the intended purpose begins. In the system of IFRS, depreciation of tangible or intangible assets should start when they are available for use. According to the Hungarian rules, depreciation and amortization can be recognized for normally used assets only, meaning that the recognition of depreciation ends if the tangible asset is removed from the scope of normal use, the asset reaches its planned residual value, or it is derecognized. In the IFRS system, just like the starting date, the end date of depreciation is independent from normal use; this is only limited by derecognition or holding for sale.

The regulations concerning residual value and useful life also reveal fundamental conceptual differences. The Accounting Act regards these as important in the planning of depreciation. The accounting treatment of the useful life and the residual value is basically static, although if the residual value or the useful life change considerably, the Act allows, but does not require, corporations to make corrections. By contrast, the standards require the revision of useful life and residual value of both tangible assets and intangible assets for each financial year-end, and the correction of the estimation if there is a considerable difference. The standard on tangible assets requires the same for the residual value. For intangible assets, however, IAS 38 Standard requires that the residual value of intangible assets be different from zero only in specific cases where the residual value can be reliably measured (there is a commitment to sell the asset at the end of its useful life or the asset has an active market through that residual value can be determined, and it is probable that such a market will exist at the end of the asset's useful life). Dynamism, however, applies here as well. If, for instance, a buyer appears for the intangible asset and buys the asset at the end of its useful life, the residual value will appear at the year-end. IFRS does not limit the duration of the useful life. If this life is indefinite, then the recognition of depreciation is not allowed. By contrast, the Accounting Act is restrictive and sets a five-year maximum duration for completed experimental developments. It requires that goodwill be depreciated within 5 to 10 years, while, for the latter case, IAS 38 emphatically forbids the recognition of depreciation.

We have found fundamentally different approaches in the determination of impairment as well. Under IFRS, impairment is recognized for tangible or intangible assets if the recoverable amount is less than the carrying amount, and the recoverable amount is determined by the higher of the fair value at the financial year-end or the value in use calculated from the expected future cash flows. In the case of extraordinary write-off, the Hungarian Accounting Act usually ignores the capability of assets generating future cash flows, i.e. their value in use. For the recognition of an extraordinary write-off, the Hungarian Accounting Act requires that the market value of normally used assets be durably low and the market value of assets not suitable to be used for their intended purpose be expected durably low. Another difference is that the Hungarian Accounting Act requires that write-off be recognized not in the value applicable on the closing date but in the one applicable on the date of balance sheet preparation. This requirement implies that the tangible or intangible assets in the balance sheet have a value that can relate to the performance and events of the next business year.

4. DEPRECIATION IN CORPORATE TAXATION

The Corporate Tax Act applies the concepts defined in the Accounting Act, i.e. it distinguishes non-current assets from current assets. For non-current assets, it requires the recognition of depreciation for tangible assets and amortization of intangible assets, while it forbids that for non-current financial assets and the entire class of current assets. The basis for the depreciation (amortization) of tangible and intangible assets is their cost. There are no differences between

the two acts in this regard. However, amortization and depreciation is still calculated differently under the Accounting Act and the Corporate Tax Act.

The basic principle is based on the primary function of the Corporate Tax Act; to ensure tax revenues, it determines the mandatory depreciation and amortization rates based on a value-based, linear method.

The Corporate Tax Act calculates depreciation in the following procedure: In the first step, it neutralizes the effect of the accounting depreciation, i.e. it adds the (negative) item recognized as expense according to the Accounting Act to the calculated tax base, then in the second step it reduces the same with the tax depreciation, applying the rates specified in the Corporate Tax Act for each product group individually.

The tax base is a category linked to the payment obligation and not the profitability of the entities. To put it in a slightly more polarized way, it is a calculated base with the sole purpose of providing a proper basis for collecting fiscal revenues.

Another important difference is the treatment of the residual value. The Accounting Act allows for the inclusion of the residual value in the calculations, i.e. depreciation and amortization are calculated on the base of the depreciable amount, i.e. the cost reduced with the residual value, while the Corporate Tax Act does not allow this reduction of the initial cost. Assuming the same depreciation rates in the accounting and the corporate tax, if there is some residual value, then the accounting depreciation or amortization is less than the tax depreciation or amortization, because the basis for accounting depreciation is lower.

Differences in the amounts of depreciation and amortization calculated according to the Accounting Act and the Corporate Tax Act provide various options for tax optimization. These are as follows:

- If the rate, the useful life, and the depreciable amount according to the Accounting Act and the Corporate Tax Act are identical, then profit before tax will increase and decrease by the same amount in each year of the useful life. This means the procedure does not have any implications on tax and tax base.
- If we include residual value in the calculation of depreciation according to the Accounting Act, then the increasing factor (assuming the same depreciation rate) is always lower than the reducing factor, i.e. the tax base is lowered by a more than it is increased. Therefore, the tax liability will be lower.
- If different depreciation rates and accelerated amortization are applied in the accounting, and the depreciable amount is the same, then the payment obligation will be higher in the short run and lower in the long run. However, at the end of the depreciation or amortization period, the two items wholly offset each other.
- For extraordinary write-off (impairment), there is always an increasing effect on the tax base but the decreasing effect is limited.

In summary, on the one hand, the level of the residual value and the depreciation rate can result in a lower nominal tax liability. On the other hand, by taking into account the time value of money, scheduling the payment of the tax liability can also be an advantage.

5. COMPARISON OF DEPRECIATION TERMS

The Accounting Act specifies the categories of non-current and current assets, and tangible assets, intangible assets and financial assets have separate lines under non-current assets in the balance sheet, where tangibles and intangibles can be depreciated. The ESA 2010, however, does not make this kind of differentiation. It applies the fixed asset category, which includes both tangible and intangible assets such as the result of R&D, which is a product constituting intellectual property.

Another difference is that the investment concept of the system of national accounts is separated from gross fixed capital formation, which is a broader category. This investment category does not include, for instance, assets procured under leasing arrangements or assets constituting intellectual property, while gross fixed capital formation includes not only the procurement of new and used fixed assets, but also the value of assets procured under financial leasing arrangements and the value of restoring non-produced fixed assets.

The system of national accounts requires the application of the market price in valuation as a general principle, increased, for instance, by the incidental expenses related to used assets, which then increase the value of the used fixed asset. Renovation projects of high value, if they increase the life and efficiency of the asset in question, are also added to gross fixed capital formation as value-increasing investments.

However, the values change year by year, as by definition of national accounts 0, the gross value of fixed assets includes the value of all fixed assets still used at the actual or estimated acquisition prices of similar new assets, irrespective of the age of the used assets. The emphasis is on the current acquisition prices (from the year in question), calculated based on separate investment price indices.

For intangible assets a cost-based estimation is applied under the EU directives according the features of these assets, mainly produced by own production.

Proprietary rights and goods acquired under a durable leasing arrangement belong to non-produced assets. Any increase in their value is, therefore, not recognized as accumulation, but as the balance of acquisition and selling in the capital account.

The statement for each institutional sector is prepared based on this, similarly to the balance sheet applied in accounting.

Naturally, gross asset value includes amortization as well. Growth over a given period does, however, obviously require the deduction of annual amortization, deterioration of the gross value.

This is where we can find considerable differences. While accounting applies the principle of actual deterioration, corporate taxation focuses on state revenues, and the system of national accounts considers depreciation in an economic sense. Depreciation calculated for accounting purposes is primarily for-profit optimization. In the accounting term the depreciable amount is the systematic allocation of the depreciable amount over the useful life of the asset, and not the economic life of the asset. Kim and Moore highlight the subsidy effect for firms when the accounting rate for depreciation is higher than economic rate 0. This means that macroeconomics does not calculate depreciation in accounting term but consumption of fixed

capital, which is different, even if they are sometimes used as synonyms. There are two statistical approaches to consumption of fixed capital: One is based on time series, i.e. the asset loses its value as it ages, the other one is depreciation due to obsolescence. In other words, depreciation and productive capital is calculated — taking the distribution of scrapping also into account — using statistical methods from two factors. One is the relation between age and price and the other is the relation between the age and efficiency of the asset. Under company taxation depreciation process usually applies the straight-line method.

The starting point is again the value. The OECD recommendation issued in 2009 suggests the application of the value determined in accounting or taxation terms only with reservations, primarily due to the different price indices. The current consensus is that 200 investment price indicators are weighed: Based on monthly Laspeyres price indices, quarterly indices are calculated and these are then converted using the sectoral Paasche-weights. The annual price indices broken down into asset groups and sectors are then aggregated by chaining, which produces the annual statistics in a comparable value 0.

As we can see, the relationship between accounting and statistical concepts and methodologies is rather weak. Therefore, it is obvious that the aggregation of assets in corporate balance sheets does not produce the amount of the relevant national account.

The method of collecting statistical information in Hungary corresponds to the international requirements and is complemented by quarterly and annual data collection. We can, however, see a considerable difference between the accounting approach and the statistical approach here as well, as quarterly data collection covers businesses with more than 50 employees, while annual data collection covers businesses with more than 20 employees. Though most of the investments are not made at small and medium-sized enterprises; the estimate, however, does not show their specificities.

Expected life used to calculate the net value also show a difference. Applying the above-mentioned statistical methods, Cseh calculated estimated expected economic lives from the data sources using data from a fixed-asset survey in 2000 0. Combining this with the expert opinions, to which we added the time periods calculated from the corporate tax rates, we got the following results:

Table 1: The expected life of assets in years, calculated with statistical and CTA-methods⁶⁷

| | <i>Economic life</i> | <i>Tax useful life</i> |
|--|----------------------|------------------------|
| Buildings, civil engineering works | 82.8 | 20 / 33.3 / 16.6 |
| Machinery in long-term use ⁶⁸ | 35.9 | 7 |
| Frequently replaced machinery | 11.4 | 3 |
| Transport equipment | 29 | 5 |
| Software products | 5 | 3 |

⁶⁷ Source: Estimation of Cseh 0 and Corporate Tax Act 0

⁶⁸ Machinery in long-term use includes equipment depreciation written-down with the general rate, 14.5%, frequently replaced machinery includes those depreciation written-down with the 33% key

6. CONCLUSIONS

Our research has established that the concept of depreciation is different in the systems of economics and accounting. It affects inventorying, and eventually provides an entirely different result: Corporate depreciation calculated according to the rules of accounting is different from the depreciation calculated in the international system of accounts. In addition to the differences in concept and grouping, the amount underlying the determination of depreciation is also interpreted differently. Useful life is also calculated differently. The Corporate Tax Act applies a very simplified method which, almost exclusively, guarantees budget revenues, which creates a new set of values.

Economic calculations take priority in macroeconomic decisions. Aggregated business indicators, however, also carry important information. Even the direction of the accounting calculation method is different from depreciation calculated on the macroeconomic level. Any further research would certainly require that the depreciation indicators calculated according to the rules of the individual frameworks be shown and analyzed together.

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COMMERCIAL INSURANCE AS A TOOL OF CONSUMER PROTECTION IN THE CZECH REPUBLIC⁶⁹

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Abstract: *Guarantee insurance is used by the state to solve some questions of consumer protection. To be specific it is insurance of tour operators against bankruptcy. The insurance covers business risks of businesses and legal entities and that is the reason why the use of guarantee insurance in this context brings about several problems. On the one hand there are theoretical problems which deal with interpretation and explanation of the nature and principles of insurance and their application to insurance products and also problems concerning risk assessment of these products. On the other hand, there are problems which deal with practical application and which are connected with the fact that there is no big interest in this kind of guarantee insurance among insurers with regard to their nature. Consumers demand full insurance coverage, however, taking into account the regulation of insurance market and the nature of insurance it is not possible to guarantee full insurance cover of losses which are caused by bankruptcy of a tour operator or an employment agency. At present, travel agents have a new duty to contribute to the guarantee fund. This means that there is an effort for multi-source funding to protect the consumer. The aim of this article is to analyze and assess the role commercial insurance plays in consumer protection within the context of the business of tour operators.*

Keywords: *Tour operator, guarantee fond, guarantee insurance*

1. INTRODUCTION

Consumer protection is an issue, which in recent years, has been addressed in different areas of economic life. In some cases, commercial insurance has been used by the state as an alternative tool of consumer protection, especially in those areas where problems with the financial losses of consumers are involved, and where consumers have already suffered losses (especially financial losses) as a result of business activities. Tour operators and employment agencies in the Czech Republic are among those businesses whose activities may result in financial losses for consumers, and thus they are affected by attempts to compensate consumers for their losses using commercial insurance.

Tour operators are legally obliged to have a financial guarantee against bankruptcy: either guarantee insurance, or a bank guarantee.

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In accordance with the requirements of European legislation, consumer protection is further ensured by the creation of a so-called guarantee fund. The implementation of the guarantee fund is linked to the requirement to cover all the claims of tour operators' clients who have suffered a loss, as insurers and banks are willing to cover losses up to a specific limit.

The aim of this article is to analyze and assess the role commercial insurance plays in consumer protection within the context of the business of tour operators. It also evaluates the problems regarding the use of relevant insurance products, in particular from the theoretical point of view.

2. INSURANCE OF TOUR OPERATORS AND EMPLOYMENT AGENCIES AGAINST BANKRUPTCY

Tour operators mainly use guarantee insurance as a guarantee (in accordance with the requirement of the relevant legislation).

The term itself - insurance against bankruptcy – is controversial, as both the conduct of business and the likelihood of bankruptcy are associated and linked to deliberate risk. From the theoretical point of view, deliberate risks are not supposed to be a subject matter of commercial insurance. Commercial insurance entails, from the theoretical point of view, net risks, i.e. risks which, if taken, may have only a negative impact (in contrast to deliberate risks, which, if taken, may result in either a positive or a negative outcome) and, consequently, net risks are not caused deliberately (in the course of conducting business, companies deliberately take risks when expecting the positive outcome of such risks).

The main problem concerning the insurance of employment agencies is the risk assessment of their business, as the insurance involved is insurance to cover financial losses and is closely related to the agencies' approach to doing business. Moreover, the use of mandatory insurance may be linked to moral hazard in business.

3. A HISTORICAL VIEW

The insurance of tour operators was introduced in the Czech Republic as mandatory contractual insurance in the year 2000 (October 1st). The reason for the legal regulation of the activity of tour operators and the introduction, at the same time, of the mandatory insurance of tour operators in the Czech Republic against bankruptcy was the attempt to solve the problems connected with the functioning of tour operators in the second half of the 1990s. During that period, tour operators were going bankrupt, with a negative impact on their clients (in 1997 alone, six thousand clients of tour operators got stranded abroad without any provision of repatriation). These problems were caused by the rapid development of the tourist industry in the 1990s, which was connected with the growth in the number of tour operators (in 1989, there were only six tour operators in Czechoslovakia, while in 1990, the number had already reached 600). Insurance is one of the tools that can be used to relieve the negative impact of the bankruptcy of tour operators on their clients (no provision of repatriation and no financial compensation for services paid for but provided only in part or not all). In addition to insurance, tools such as a guarantee fund, a pledged deposit or bank guarantee may also be used. The insurance of tour operators against bankruptcy was introduced in the conditions of the Czech Republic in the form of mandatory contractual insurance. That means that taking out insurance is a precondition for the commercial activity of a tour operator, a tour operator being defined as a "commercial entity, which, on the basis of a concession, is authorized to organize, offer and sell excursions" [1]. The term "excursion" is taken to mean the combination of at least two of

the following services: transport, accommodation, and other tourist services constituting a significant part of the excursion, or whose cost constitutes at least 20% of the cost of the excursion [1].

This means that mandatory insurance does not apply to the services of so-called travel agencies; neither does it apply to those services offered by tour operators which do not fall within the definition of an excursion (individual tourist services, the sale of objects connected with tourism etc.) The insurance of tour operators is, by its nature, guarantee insurance, that is insurance, which is meant to cover the obligations, which the insurance policy holder has towards other parties [2]. According to the law governing this type of insurance, the function of the insurance is to cover losses incurred by the clients of a tour operator in the event of its bankruptcy, namely: the total lack of provision of a purchased service, the failure to provide contractual services in the location of the excursion (for example, failure to provide a transfer from an airport, or a lack of accommodation), failure to provide repatriation to the client's home country, interruption of the client's stay.

4. AN INSURANCE POOL

Since October 2000, the provision of insurance to cover the bankruptcy of tour operators has meant, on the one hand, a new business opportunity for insurance companies, while, on the other hand it has been a relatively questionable product [3]. The insurance companies were given the task of introducing a new type of product (at that time, even guarantee insurance was not widespread on the Czech market). They had no experience of covering that type of risk. Before offering insurance products, it is necessary first to determine the presumed size of the possible indemnity payments in order to set the level of the insurance premium. In the case of the insurance of tour operators, it is necessary to evaluate the seriousness of the risk (financial risk). When an insurance product is introduced, it is very complicated to evaluate in advance the probability of bankruptcy and the extent of the damage it may cause.

Concerns about the size of the risk (especially following the development in the second half of the 1990s) led the insurance companies to unite in a co-insurance pool [2] (p. 107), in order to cover the possible impact of the risks. A co-insurance pool is a voluntary association of insurers established to create a greater insurance portfolio and joint cover of large-scale insurance events.

At the same time, a co-insurance pool means that the associated insurers offer an insurance product under the same conditions, and that one insurer is empowered to do business in the name of all the members of the pool. It also means that the coinsurance pool can hedge its assets as whole. This characteristic clearly means that, on the one hand, risks are covered jointly, while on the other hand the pool has an impact on the principles of market competition. That is why the pool was granted a two-year exception for its activity by the Office for the Protection of Competition valid from 12.1.2001 [4].

Membership of the pool (see Tab. 1) brings several advantages, above all:
the distribution and minimization of risk through the acquisition of quality reinsurance abroad and also the reduction of administrative costs,
a certain amount of standardization of the evaluation of risks of those parties interested in insurance, which contributes to the harmonization of the insurance conditions of tour operators of comparable type,

a simpler system for the clients thanks to the centralization of the reporting of loss occurrence and the harmonization of conditions for the payment of damages.

Table 1: Structure of the co-insurance pool

| Insurer | Share in % |
|--------------------------------|------------|
| Allianz pojišťovna | 11,11 |
| Česká podnikatelská pojišťovna | 11,11 |
| Česká pojišťovna | 11,11 |
| Česko-rakouská pojišťovna | 5,56 |
| Generali pojišťovna | 16,67 |
| ČS-Živnostnská pojišťovna | 11,11 |
| IPB pojišťovna | 11,11 |
| Kooperativa pojišťovna | 11,11 |
| Komerční pojišťovna | 11,11 |
| Total | 100,00 |

Source: Internal sources of the company Etics ITP, s.r.o. [5]

The division of capacity within the pool means that when there is an insurance claim incurring indemnity of less than 45 million Czech crowns, the amount is paid out by the members of the pool according to a given ratio. If the indemnity exceeds that amount, the difference between the amount to be paid and 45 million Czech crowns is covered by the reinsurer up to the total capacity of the pool (to a maximum of 150 million Czech crowns). If the amount required to cover exceptionally high risks exceeds that total capital, the leading insurer provides individual reinsurance to the required amount.

During the autumn of 2002, the Office for the Protection of Competition issued a ruling [6] which extended the validity of the exception from the ban on an agreement on a joint approach by insurers towards guarantee insurance in the case of the bankruptcy of a tour operator until 31.12.2003. Nevertheless, the granting of that exception was subsequently restricted by several conditions, which were, however, not fulfilled by the insurance companies (for example, the setting of a unified tariff scale, the lack of individual reinsurance, and, above all, the lack of competitive insurance). For that reason, the insurance pool terminated its activity at the end of 2003, which, in fact, led to the de-monopolization of the market for that type of insurance.

At the beginning of 2004, there were only five insurers on the market, which offered insurance against the bankruptcy of a tour operator. During the course of the following years, the structure of that market has changed. Currently, a relatively small number of insurance companies offers the insurance of tour operators: Česká podnikatelská pojišťovna, ERV pojišťovna, Generali pojišťovna, Slavia pojišťovna, UNIQA pojišťovna, and the Slovak insurance company Union. This lack of interest in providing insurance for tour operators is due to the nature of the insurance, its level of risk and problems connected with providing insurance as a matter of principle.

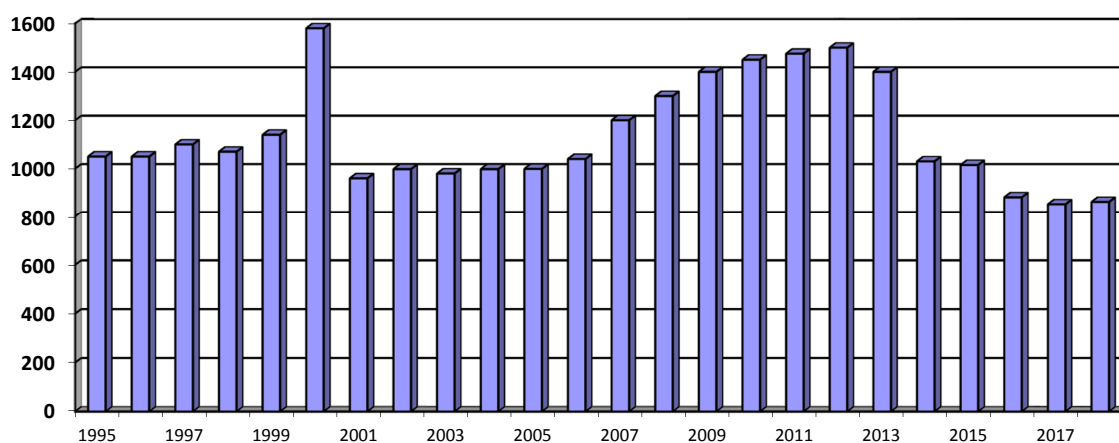
5. PROBLEMS CONNECTED WITH THE INSURANCE OF TOUR OPERATORS

From the point of view of insurance theory, the question of the nature of the risks covered when applying the mandatory insurance of tour operators is a problematic one. According to insurance theory, insurance as a financial category is focused on covering so-called net risks [7] the negative impact of which is determined by completely random factors. The opposite of net risks are so-called calculated risks, which can be influenced by an interested party. From a theoretical point of view, the character of this type of insurance is, therefore, questionable, as the major causes of the bankruptcy of tour operators include the wrong business plan, the underestimation of risks, a decline in demand, a too narrow focus on a particular type of tourism or region, and the devaluation of the Czech crown. In the past, the cause of the bankruptcy of tour operator sometimes turned out to be fraudulent practices, or even the establishment of a tour operator with the intention to commit fraud. The fact that the insurance of tour operators is in conflict with the very nature of insurance as a financial category gives rise to some problems connected with the operation of that type of insurance.

There is a relatively large number of tour operators on the Czech market (see Fig. 1), but the number of tour operators has fallen in recent years. The decline in the number of travel agents is due to new regulatory approaches, particularly mandatory insurance.

The tour operators are insured by six insurance companies (see Tab. 2).

Fig. 1: Number of tour operators on the Czech market



Source: Statistics on tour operators, Ministry for Local Development, available at www.mmr.cz [8]

Table 2: Distribution of tour operators insured by individual insurance (2018)

| Insurer | Number of insured tour operators |
|--------------------------------|----------------------------------|
| Generali pojišťovna | 208 |
| Česká podnikatelská pojišťovna | 192 |
| Uniqua pojišťovna | 118 |
| Union pojišťovna | 190 |
| ERV pojišťovna | 117 |
| Slavia pojišťovna | 37 |

Source: Number of insured tour operators, available at <https://www.accka.cz/stranka/zakony-a-dokumenty/seznam-pojistenych-ck/12093> [9]

Tour operators are obliged to take out insurance, although there have, of course, been cases where that obligation has not been fulfilled. If the insurance of a tour operator expires and the operator continues to sell excursions, the lack of insurance usually only becomes apparent when a problem arises. In the case of a formerly insured, but now uninsured tour operator, according to the principles of insurance, the insurance company, which insured the tour operator, does not pay out indemnity to the tour operator's clients. Practically speaking, from the point of view of the timescale of the insurance of tour operators, the principle of loss occurrence is applied, which means that insurance applies to excursions sold during the period when the tour operator's insurance policy was valid, even if the loss occurs when the policy is no longer valid. In addition, there is a problem with the definition of the term "excursion", which is the subject of the insurance. If a tour operator intentionally divides the services it offers into parts (for example, accommodation, transport), the services of the operator are no longer insured and, in the case of bankruptcy, the clients have no claim to indemnity.

Another problematic issue is the size of the insured sum. According to the law, a tour operator must take out insurance to cover a sum equal to at least 30% of its annual planned takings from the sale of excursions. At the same time, the size of the insured sum has an impact on the insurance premium (alongside other factors such as the destination countries of the excursions, the means of transport, the evaluation of the creditworthiness of the tour operator, the structure of its assets, its liquidity etc.). If the insured sum is underestimated and an insurance claim is made, the insurance company, according to the principles of insurance, pays out indemnity only up to the agreed insured sum. In some cases, this situation has arisen following the bankruptcy of tour operators. The clients did not receive indemnity in full. In some cases, this has led to litigation, and some insurance companies have been required to pay indemnity greater than the agreed insured sum. This approach displays a lack of understanding of the principles of insurance, as insurance companies, when taking on risks by insuring them, and when evaluating the risks (in order to set the insurance premium), base their decisions on the insured sum.

An insurance company cannot assume the pay-out of indemnity greater than the agreed insured sum. If that was required of an insurance company, it would mean the possibility of moral hazard on the part of the tour operators and the rejection of the basic principles of insurance theory. It would also be in conflict with the rules on the economic activity of insurance companies, especially those rules found in the law on the insurance business (any proposed law on the tourist industry requiring insurance companies to pay indemnity greater than the agreed insured sum could deter commercial insurance companies from offering that type of insurance).

Within the context of the insurance of tour operators a debate has arisen about the fact that insurance companies use limit of cover when constructing their insurance products. Aggrieved clients in particular did not understand that, when an insurance company went bankrupt, they did not receive insurance cover equal to their real financial losses caused by the failure of the tour operator to fulfil its obligations, but a smaller amount, because the tour operator had agreed an insufficiently large insured sum.

A lack of understanding of the nature of commercial insurance has also been seen in the approach of relevant state institutions, which have requested unlimited insurance cover from insurance companies. In such cases it is very complicated for insurance companies to evaluate the level of risk and to set an appropriate insurance premium, which is something required of them by the regulation of the insurance sector.

Within the framework of mandatory insurance cover, the current modification assumes a limit on insurance pay-outs, but requires greater responsibility on the part of insurance companies when making decisions about the size of the insured sum (coverage limit) and, at the same time, requires that the tour operators regularly inform their insurance companies about the sales of their excursions.

The fact that there is a problem connected with the activity of tour operators is currently shown by the number of tour operators that have gone bankrupt in the period following the introduction of mandatory guarantee insurance (see tab.3).

Table 3: Number of bankruptcies of tour operators

| year | Number of cases |
|------|-----------------|
| 2001 | 3 |
| 2002 | 4 |
| 2003 | 5 |
| 2004 | 4 |
| 2005 | 4 |
| 2006 | 1 |
| 2007 | 3 |
| 2008 | 1 |
| 2009 | 3 |
| 2010 | 9 |
| 2011 | 10 |
| 2012 | 8 |
| 2013 | 5 |
| 2014 | 3 |
| 2015 | 3 |
| 2016 | 2 |
| 2017 | 2 |
| 2018 | 3 |

Source: Number of bankruptcies of tour operators, Ministry for Local Development, available at <https://www.mmr.cz/cs/Pro-media/Tiskove-zpravy> [10]

According to the legal regulation [1] a bank guarantee is an alternative to guarantee insurance. In reality, however, bank guarantees are not utilized. The solution to the problem of tour operator bankruptcy requires a specific approach, and the banks on the Czech market basically do not offer an appropriate product.

5. GUARANTEE FUND

Efforts to ensure full compensation for clients' losses in the case of the bankruptcy of a tour operator led to the creation of a multi-source solution to the negative impact of bankruptcy. This stemmed from the decision to introduce a guarantee fund (from 1.7.2018).

In addition to their obligation to have a guarantee in the form of guarantee insurance or a bank guarantee, tour operators are also obliged to contribute to a guarantee fund. It is from this fund that compensation is paid out to the aggrieved clients of a tour operator if the company goes bankrupt and the limit of its indemnity payment is not sufficient to cover all the claims of the clients.

Tour operators are obliged to pay annually into the guarantee fund 0.1% of the revenue from excursions sold (the original aim was for this to be 0.25% of revenue from tour sales). The size of this contribution will change in future as the volume of the guarantee fund increases – The contribution could be reduced to zero when the fund reaches 50 million CZK. The introduction of the guarantee fund increases the overall costs of tour operators, which has led to a discussion about its necessity [11].

At the same time the use of the financial resources concentrated in the guarantee fund poses a problem, as, alongside its basic purpose of covering clients' claims in the event of the bankruptcy of a tour operator, it is assumed that it will be used for other purposes, for example the promotion of tourism in the Czech Republic.

6. SUMMARY

Guarantee insurance has a relatively short history on the Czech insurance market. Under the conditions of the Czech insurance market the state uses guarantee insurance, within the framework of the two forms of mandatory insurance, to resolve the issue of consumer protection. It could be said that, to a certain extent, responsibility for the entrepreneurial risk of selected commercial entities is transferred to commercial insurance companies. In the case of tour operators and employment agencies the risk that is insured is the risk of bankruptcy. The very nature of these insurance products is a theoretical problem. According to insurance theory, one of the basic principles of insurance as a financial category is the fact that insurance covers only so-called net risks. The business activity of tour operators and employment agencies is, however, connected with so-called deliberate risks (and, according to insurance theory, insurance should not deal with those). A theoretical problem connected with the implementation of insurance covering deliberate risks is then the possibility of moral hazard, which is incompatible with the essence of insurance.

Within the framework of the provision of the monitored insurance products a complex issue arises on the one hand from the setting of an appropriate insured sum (limit of cover) and, on the other hand, from accurate risk assessment, that is the setting of an appropriate insurance premium and other connected technical parameters of insurance, such as the size of the technical provisions and sufficient reinsurance. The result of this is that there is little interest among insurers in offering guarantee insurance in the form of the insurance of tour operators against bankruptcy. That type of insurance is offered only by a limited number of insurers.

Guarantee insurance is used by the state to resolve the issue of consumer protection, and, in this case, it is mandatory insurance. Because it involves the covering of the entrepreneurial risk of an economic entity, the use of guarantee insurance for this purpose brings a number of problems. Some are problems of a theoretical nature connected with the explanation of the fundamental nature of insurance and its application to specific insurance products and problems arising from the issues of risk assessment connected with those products.

Others are problems with the practical application of insurance arising from the fact that insurers are not greatly interested in offering that kind of guarantee insurance. (Only six insurers offer it on the Czech insurance market).

The problems of ensuring consumer protection using commercial insurance are also connected with an understanding of the fundamental nature of insurance. Consumers demand insurance compensation in full, but due to the regulation of the insurance business and the very nature of

insurance itself, it is not possible in all cases to cover all losses caused by the bankruptcy of a tour operator.

That is why over time other tools have come into use to provide a guarantee for tour operators. These include a bank guarantee as an alternative to guarantee insurance. However, that option is not currently used as it is unavailable. (The banks simply do not offer that product).

In addition, the guarantee fund was introduced as a superstructure for guarantee insurance and bank guarantees. This made the system of consumer protection in the travel business more complicated and more expensive. The introduction of the guarantee fund solved the problem of how to cover the claims of tour operators' clients in full in cases of bankruptcy (which was also a requirement of European legislation). However, because it is so costly, the justification for such strong consumer protection remains questionable.

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UTICAJ INVESTICIONE POLITIKE NA DONOŠENJE ODLUKA

IMPACT OF INVESTMENT POLICY IN DECISION-MAKING

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Sadržaj: *U nekoliko proteklih decenija, vlade širom sveta preduzimaju velike napore u promociji stranih direktnih investicija, pri čemu se široko koriste poreski i finansijski podsticaji. Oni se, uglavnom, odnose na smanjenje poreza na dobit pravnih lica, izvozne podsticaje, izuzeće od carina, bespovratna sredstva i druge subvencije za privlačenje stranih investitora. U drugim slučajevima, vlade pokušavaju da postignu određene ciljeve, kao što su otvaranje novih radnih mesta, transfer tehnologija, razvoj neophodnih veština ili povećanje izvoza. Najveći deo istraživanja u literaturi okrenut je ka analizi stranih direktnih investicija u određenoj zemlji u jednom sektoru tokom određenog perioda. S druge strane, strane direktne investicije se analiziraju kao homogeni fenomen. Ova dvojnost otežava vladama zemalja u razvoju da izvuku pouke u cilju izrade politika. Njima je potreban dovoljno jednostavan okvir koji omogućava donošenje logičkih zaključaka. Ovakvi okviri, takođe, treba da pomognu u jasnoj organizaciji i postavljanju prioriteta višestrukih, složenih varijabli koje utiču na maksimiranje koristi od investicija. U tom kontekstu, postoji praznina u literaturi o investicionoj politici koja povezuje ove zahteve.*

Ključne reči: *politika investiranja, strane direktne investicije, trgovina i investicije, produktivnost, plate*

Abstract: *In the past few decades, governments around the world have made great efforts to promote foreign direct investment, with tax and financial incentives widely used. They are mainly related to the reduction of corporate income tax, export incentives, customs exemption, grants and other subsidies to attract foreign investors. In other cases, governments are trying to achieve certain goals, such as job creation, transfer of technology, the development of necessary skills, or an increase in exports. The largest part of the research in the literature is oriented towards the analysis of foreign direct investments in a given country in one sector over a certain period. On the other hand, foreign direct investment is analyzed as a homogeneous phenomenon. This duality makes it difficult for governments of developing countries to draw lessons in policy making. They need a sufficiently simple framework that allows logical conclusions to be made. These frameworks should also help in the clear organization and setting of priorities of multiple, complex variables that influence the maximization of investment benefits. In this context, there is a gap in the literature on investment policy that links these two requirements.*

Keywords: *investment policy, foreign direct investment, trade and investment, productivity, wages*

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1. UVOD

Modeli međunarodnih investicija dramatično su se promenili tokom protekle tri decenije. Osim promena u obrascima stranih direktnih investicija (SDI) i uključenih strana, došlo je i do promena u trgovini i propisima koji regulišu SDI. U zemljama u razvoju SDI su se uglavnom koncentrisale na prirodne resurse. Međutim, mnoge od ovih zemalja su sada postale zemlje domaćini SDI, koje uključuju sofisticiraniju proizvodnju roba i usluga. U 2014. godini, ekonomije u nastajanju i tranziciji činile su 39% globalnih odliva SDI, u poređenju sa 12% početkom 2000-tih [1]. Danas mnoge robe i usluge dopiru do potrošača kroz proizvodnju u stranim filijalama multinacionalnih kompanija. Globalni lanci vrednosti sve više oblikuju izgled za rast u ekonomijama u razvoju. Između 1990. i 2012. godine, udeo zemalja u razvoju u globalnoj trgovini porastao je sa 20% na više od 40%. Ekonomije sa najbrže rastućim učešćem u globalnim lancima vrednosti imaju stopu rasta bruto domaćeg proizvoda (BDP) po glavi stanovnika oko 2% iznad proseka. Takođe, postoji pozitivna korelaciju između stokova SDI i globalnog učešća u lancu vrednosti, posebno u najsiromašnijim zemljama, što ukazuje na to da SDI mogu pomoći zemljama u razvoju i povećati njihovo učešće u globalnim lancima vrednosti [2].

Debate o investicionoj politici se fokusiraju na to kako da zemlje "uhvate" mogućnosti koje nude globalni lanci vrednosti kako bi povećale izvoz i, što je još važnije, za diversifikovanu kompoziciju tog izvoza prema robama i uslugama veće dodate vrednosti. Postoji konsenzus među ekspertima da otvorena trgovina i investicioni režimi podstiču učešće u globalnim lancima vrednosti [3], [4], [5]. Postoji i saglasnost o ključnoj ulozi koju u ovom procesu imaju infrastruktura, obrazovanje i obuka, kao i politika tržišta rada. Ipak, potrebno je bolje razumevanje politika koje mogu maksimirati potencijalne koristi od SDI za zemlje domaćine.

2. ZAŠTO SU POTREBNE SDI?

U okviru šire promocije zapošljavanja i ekonomskog rasta, zemlje se takmiče za SDI da bi privukle transfer tehnologija, ojačale menadžerske i organizacione sposobnosti, povećale pristup stranim tržištima i diversifikovale izvoz. Mnoge studije su pokazale da SDI mogu povećati produktivnost (posebno u uslugama), povećati ulaganja u istraživanje i razvoj i generisati bolje plaćene i stabilnije poslove u zemljama domaćinima.

Koristi od SDI nisu automatske. U meri u kojoj zemlje regulišu investicije i osmišljavaju druge politike koje utiču na efekte preliivanja (*spillover*), SDI direktno utiču na ekonomske, ekološke i socijalne efekte. Stoga je važno da vlade dobiju "pravu kombinaciju" politika za pravilno upravljanje različitim vrstama SDI. Istorijski gledano, neadekvatan dizajn i/ili izostanak implementacije odgovarajućih politika mogu u mnogim situacijama sprečiti zemlje u razvoju ne samo da privuku i zadrže SDI u domaću ekonomiju, nego i u maksimiranju koristi od SDI.

Uprkos povremenim mešovitim ishodima SDI, pravo pitanje kreatorima politika u zemljama u razvoju nije da li treba birati između SDI i domaćih investicija, nego kako ih povezati. Čak i u onim sektorima u kojima nema domaćih investicija, ostaje pitanje da li da se privlače SDI ili da se uopšte ne investira. Prema ekonomskoj teoriji, glavni razlog za privlačenje SDI prvenstveno leži u njihovom potencijalu da pruže veću dinamičku korist ekonomijama domaćina. Međutim, nizak nivo akumulacije domaćeg kapitala i tehnologija u mnogim zemljama u razvoju praktično znači da, ukoliko se ne privuku SDI, izgledi za generisanje dodatnih izvora ekonomskog rasta ostaju ograničeni. Štaviše, u međuzavisnoj međunarodnoj ekonomiji, gde prosperitet zavisi od tehničkog znanja ugrađenog u robe i usluge i učešća u globalnim lancima vrednosti, relevantno

pitanje nije da li su SDI dobre ili ne, već koje su ključne politike potrebne da bi se maksimirali njihovi pozitivni efekti za razvoj.

3. PRELIVANJE PRODUKTIVNOSTI

Postoje brojne studije o produktivnosti ili tehnološkom jazu između stranih i domaćih firmi, a u nekoliko studija su analizirani direktni efekti stranog vlasništva na njihovu akviziciju i ispoljavanje pozitivnih efekata na produktivnost. Gledajući proizvodni sektor, Harris i Robinson [6] smatraju da firme u stranom vlasništvu u Velikoj Britaniji, generalno, imaju veću ukupnu faktorsku produktivnost. Pored toga, Conyon i dr. [7] i Girma i Görg [8] su primetili da se povećava produktivnost domaćih firmi koje su stekli stranci. Dokazi za zemlje u razvoju su ograničeni. Arnold i Javorcik [9] su pokazali da je promena domaćeg u strano vlasništvo poboljšala performanse proizvodnog sektora Indonezije. Objašnjenja za veću produktivnost stranih firmi uključuju vlasničku tehnologiju, sposobnost privlačenja više motivisanih radnika, kao i vrhunskih znanja, tehnike upravljanja i marketinške strategije. Proizvodni kapaciteti koji su dobili SDI postali su, takođe, više integrisani u globalnu ekonomiju preko većeg udela u izvozu njihovih outputa i većeg udela u uvozu njihovih inputa. Što se tiče usluga, Arnold, Javorcik i Mattoo [10] smatraju da su strane akvizicije čeških provajdera usluga rezultirale povećanjem produktivnosti rada i prodajom stečenih firmi. Ovi nalazi su konzistentni sa stranim pružaocima usluga koji Češkoj donose nove tehnologije i know-how. Njihove usluge češkim potrošačima su privlačnije jer pružaju veći kvalitet, raznolikost i dostupnost.

Prelivanja zbog SDI mogu se preneti sa stranih na domaće firme unutar iste industrije, uključujući intra-industrijska ili horizontalna prelivanja, ili između drugih industrija, uključujući inter-industrijska ili vertikalna prelivanja.

U literaturi se razlikuju dve vrste efekata. Prvi su efekti znanja (*knowledge effects*), tj. lokalna firma koristi znanje stvoreno od strane multinacionalne kompanije bez nadoknade – na primer, kroz posmatranje strane filijale, kretanje radne snage ili prenos znanja dobavljačima ili kupcima (potrošačima). Drugi su materijalne eksternalije (*pecuniary externalities*), koje se javljaju, na primer, kroz efekte cena i konkurencije – to jest, ako povećana potražnja za inputima stvara podsticaje za unapređenje, ili ulazak stranih filijala menja strukturu tržišta.

Istraživanja Svetske banke o preduzetnicima u Češkoj i Letoniji potvrđuju postojanje transfera znanja kroz demonstracioni efekat i kretanje radne snage [11]. Oni posmatraju efekat konkurencije, što u kratkom roku može imati negativan uticaj na neke firme. U vezi s tim, Alfaro i Chen [12], istražujući skup podataka na nivou cele zemlje, smatraju da su preraspodela tržišta i prelivanje znanja značajni izvori povećanja produktivnosti. Međutim, značajan udeo povećanja produktivnosti se kanališe kroz efekte konkurencije. Kee [13] nalazi dokaze za poboljšanje produktivnosti među lokalnim firmama koje dele dobavljače sa stranim firmama. Görg i Strobl [14] su ukazali na poboljšanje produktivnosti kroz prelivanje kretanja radne snage, što sugeriše da su firme koje vode vlasnici koji su radili za multinacionalne kompanije u istoj industriji neposredno pre otvaranja vlastite firme, ostvarili viši nivo produktivnosti od drugih firmi. Keller i Yeaple [15] pokazuju da su tehnološka prelivanja koje proizlaze iz SDI dovela do 14% veće produktivnosti u američkim proizvodnim firmama u periodu između 1987. i 1996. godine.

4. SDI I IZVOZ

SDI mogu dati podsticaj sofisticiranosti izvoza, što je za mnoge zemlje u razvoju teško ostvarljivo. Swenson [16] je pokazala postojanje pozitivne veze između prisutnosti stranih filijala i novih izvoznih veza između privatnih kineskih izvoznika. Koristeći detaljne kineske trgovinske statistike od 1997. do 2009. godine, Chen i Swenson [17] nalaze da je prisustvo stranih filijala u istom sektoru povezano sa sve većom vrednošću trgovinskih transakcija od strane kineskih firmi. Još važnije, postoji obimna literatura koja dokumentuje koliko je zemalja u razvoju zavisnih od izvoza roba uspelo znatno da poveća broj izvoznih proizvoda, kao i broj izvoznih destinacija. Takve zemlje su radikalno modifikovale kompoziciju njihovog izvoza kroz privlačenje, omogućavanje i zadržavanje SDI za povećanje efikasnosti. Dalje, studije slučaja su pokazale da su zemlje koje su uspele da unaprede i diversifikuju svoju izvoznu bazu postigle više stope rasta i veće blagostanje od zemalja koje su samo nastojale da prošire robe i usluge koje su tradicionalno dominirale njihovim izvozom. Iskustva različitih zemalja kao što su Kina, Češka, Kostarika, Malezija, Meksiko, Filipini i Vijetnam, između ostalog, ilustruju kako su SDI koje su usmerene na efikasnost ključno sredstvo u postizanju takvih ciljeva [5]. Na nivou preduzeća, Freund i Pierola [18] su koristili podatke iz 32 zemlje i pokazali da su pojedinačna preduzeća važna za obim trgovinske razmene zemalja i sektorske trgovinske obrasce. Ove takozvane "izvozne superzvezde" često su ulazile na izvozno tržište putem SDI.

Podaci pokazuju da multinacionalna preduzeća igraju glavnu ulogu u stvaranju novih znanja preko istraživanja i razvoja. Tako je 2002. godine pokazano da je 700 firmi (od kojih je 686 multinacionalnih korporacija) izdvajalo 46% ukupnog budžeta za istraživanje i razvoj. Štaviše, istraživanje i razvoj nije realizovano isključivo u sedištu multinacionalnih korporacija. Pregled glavnih svetskih investitora u istraživanje i razvoj je pokazao da je u 2003. godini prosečni ispitanik trošio 28% svog budžeta za istraživanje i razvoj u inostranstvu, uključujući in-house troškove stranih filijala i vanredne troškove za istraživanje i razvoj ugovoreno s drugim zemljama [19].

Nalazi ukazuju na pozitivnu vezu između SDI i većih plata koje isplaćuju multinacionalne kompanije. Iako veličina posmatranih razlika varira, veliki broj empirijskih studija otkriva da strane filijale isplaćuju veće plate u odnosu na domaće firme [20], [21]. Veće plate mogu biti posledica nedostatka lokalnog znanja, što sprečava strane firme da privuku dobre radnike bez plaćanja premije za nadnicu [22]. Efekti plata, takođe, mogu se akumulirati zbog sklonosti SDI ka višim nivoima veština. Postoje dokazi, na primer, da SDI usmerene u proizvodnju u zemljama u razvoju favorizuju napredne industrijske sektore i ta sklonost se povećava. Odnos tokova SDI između viših i nižih radno-intenzivnih aktivnosti bio je otprilike 5:1 u periodu 1990-92, i oko 14:1 u periodu 2005-2007 [5]. Ovi dispariteti mogu imati kratke i dugoročne efekte na prosečne nivoe veština i plata, posebno u zemljama u razvoju koje uspeju ući u srednje i veštinama više intenzivne lance vrednosti [23]. Dokazi o prelivanju plata na domaće firme su mešoviti. Poole [24] je našao pozitivno prelivanje multinacionalnih plata kroz mobilnost radnika. Kada radnici napuste multinacionalne kompanije i ponovo se zaposle na domaćem tržištu, ove plate i dalje rastu. S druge strane, veće plate u stranim firmama mogu smanjiti prelivanje znanja koje proističe iz fluktuacije radne snage [25].

Iako neki dokazi upućuju na to da SDI mogu doneti bolje poslove zemlji domaćinu, važno pitanje za kreatora politika je da li SDI stvaraju dodatna radna mesta. Istraživanja u ovoj oblasti su veoma ograničena. Međutim, Lipsey, Sjöholm i Sun [26] pružaju uvid u kontekstu stranih preuzimanja. Koristeći veliki panel fabrika između 1975. i 2005. godine, otkrili su da su fabrike u Indoneziji u stranom vlasništvu povećale broj zaposlenih u odnosu na fabrike koje su ostale

u domaćem vlasništvu tokom istog perioda. Pored toga, strano preuzimanje kapaciteta u domaćem vlasništvu u proseku donosi veliku trenutnu ekspanziju zapošljavanja. Nasuprot tome, nema značajnih efekata na zapošljavanje u promeni sa stranog na domaće vlasništvo. Većina efekata stranih preuzimanja na zapošljavanje dogodila se u godini preuzimanja, a rast u narednim godinama bio je relativno mali. S obzirom da su strane firme obično veće, apsolutni doprinos zaposlenosti u godinama nakon preuzimanja bio je veći nego što pod lokalnim (domaćim) vlasništvom.

5. INVESTICIONE POLITIKE I PRIVLAČENJE SDI

Poslednjih decenija, u pokušaju da privuku i maksimiraju koristi od SDI, vlade širom sveta preduzimaju znatne napore u promociju investicija, intenzivno koriste poreske i finansijske podsticaje. Oni, uglavnom, uključuju smanjenje poreza na dobit, poreske olakšice, poreske kredite za investicije, podsticaje za izvoz, oslobađanje od carina, grantove i druge subvencije za privlačenje stranih investitora, odnosno lokacijske podsticaje. U drugim slučajevima, vlade su nastojale da ostvare određene ciljeve kroz podsticanje zapošljavanja, transfer tehnologija, izvoz, povezivanje i razvoj veština.

U literaturi je podržana ciljana promocija investicija. Međutim, potrebno je više nijansiranih istraživanja o lokacijskim i bihevioralnim podsticajima SDI zbog nedostatka ekonometrijskih procena u ovoj oblasti. Pored toga, sprovedene su ograničene analize u kojima se razlikuje način na koji podsticaji mogu uticati na lokacijske i behavioralne odluke investitora o različitim vrstama ulaganja, kao što su resursno orijentisane SDI (*resource-seeking*), tržišno usmerene SDI (*market-seeking*), SDI usmerene na povećanje efikasnosti (*efficiency-seeking*) i SDI za povećanje strateških prednosti (*strategic asset-seeking*). Štaviše, većina studija se bavi poreskim olakšicama, ali ne i finansijskim, koje su takođe značajne.

Dobro organizovane i strateški aktivne agencije za promociju investicija mogu pružiti značajan podsticaj za SDI. Koristeći podatke iz 124 zemlje, Harding i Javorcik [27] nalaze da je prisutnost agencije za promociju investicija u korelaciji sa većim prilivom SDI, posebno u sektorima koje su targetirale agencije. Gruba analiza troškova i koristi pokazuje da ciljani sektori u zemljama u razvoju primaju dva puta više SDI nego sektori koji nisu targetirani i da prosečna agencija za promociju investicija utroši 90.000 dolara po sektoru. Ove procene ukazuju da je, u određenim okolnostima, svaki dolar utrošen na promociju investicija može povećati SDI za 189 dolara. Ove procene treba tumačiti sa oprezom, jer nisu samo grube brojke i zavise od niza varijabli. Međutim, ukazuju da promocija investicija može biti isplativa. Još jedna važna dodatna prepreka studiji je da ona ne rešava u potpunosti pojavu pristrasnosti pri izboru, odnosno da su sektori koje targetiraju agencije za promociju investicija izabrani na osnovu većeg potencijala za privlačenje SDI. Međutim, autori sprovode niz važnih provera kako bi smanjili ove rizike.

Harding i Javorcik [28] su koristili podatke iz 156 zemalja iz serije Global Investment Promotion Benchmarking (GIPS) Svetske banke za period od 2006. do 2012. godine da bi procenili kako kvalitet agencija za promociju investicija utiče na SDI. Njihova analiza pokazuje da su zemlje sa agencijama za promociju investicija sposobne da na profesionalan način odgovore na upite investitora i sa web stranicama višeg kvaliteta privlače više SDI. Zemlja sa GIBP ocenom kvaliteta od 60% dobila je, u proseku, 25% više SDI nego zemlja sa ocenom od 45%.

Koristeći uzorak iz 105 zemalja, Harding i Javorcik [29] smatraju da se SDI targetirane od agencija za promociju mogu koristiti za privlačenje SDI usmerenih na povećanje efikasnosti, što može da podigne kvalitet izvoza iz ekonomije domaćina. Oni su posmatrali povećanje jediničnih vrednosti izvoza iz prioriternih sektora u naporima da se privuku SDI. Rezultati ukazuju da zemlje domaćini mogu koristiti SDI za povećanje kvaliteta izvoza, kako u apsolutnom smislu, tako i u smislu premošćavanja udaljavanja od granice višeg kvaliteta.

Konačno, Gomez i Mera i dr. [30] analiziraju ankete 713 investitora, potencijalnih investitora i neinvestitora iz ekonomija u razvoju (Brazil, Indija, Južna Afrika i Republika Koreja). Oni predlažu da se agencije za promociju investicija više koriste i da budu koristan izvor investitorima kada donose odluke da uđu na određeno tržište. Skoro 70% firmi sa investicijama u zemljama u razvoju su navele da su se oslanjale na usluge koje su agencije pružale nakon odluke o ulaganju. Ključne usluge, koje su posebno cenjene, bile su pružanje informacija o procedurama i propisima poslovanja, oporezivanju korporacija i bitnim podsticajima. Osim toga, agencije za promociju investicija imaju veći značaj za male i manje produktivne firme, kojima je pristup informacijama skuplji. U istraživanju je ukazano na zabrinutost u vezi činjenice da agencije za promociju investicija igraju samo marginalnu ulogu u podizanju svesti o mogućnostima ulaganja u zemljama u razvoju. Manje od 2% je saznalo za takve mogućnosti direktno od agencija.

U 2013. godini investicioni podsticaji činili su 55% liberalizacije, promocije i mera za olakšanje koje su zemlje usvojile kako bi privukle SDI. Poreske olakšice čine više od polovine ovih mera [1]. Oslobođanje od poreza najviše preovladava u istočnoj Aziji i Pacifiku, Evropi i Centralnoj Aziji, Latinskoj Americi i na Karibima i jugu Azije, a najmanje je zastupljeno u zemljama OECD-a [31]. Istraživanje o poreskim olakšicama u zemljama u razvoju usredsređeno je na procenu fiskalnih troškova i njihove efikasnosti kao determinante u privlačenju SDI. Studije su otkrile da troškovi lokalnih poreskih podsticaja mogu biti visoki.

Poreski podsticaji su manje efikasni u neprivlačnim uslovima investicione klime, kao što su siromašna infrastruktura, makroekonomska nestabilnost i slabo upravljanje i tržište. Istraživanje investicione klime [31] pokazuje da smanjenje granične efektivne poreske stope sa 40 na 20 odsto povećava SDI za 1 posto BDP-a za zemlje rangirane u donjoj polovini Doing Business indikatora. Međutim, to ima osam puta veći efekat za zemlje u gornjoj polovini Doing Business indikatora. Uslovi investicione klime su jedan od razloga da neke zemlje rade mnogo bolje kada koriste politiku fiskalnih podsticaja da bi privukle investicije.

Efekti poreskih podsticaja se, takođe, razlikuju po vrstama SDI. SDI usmerene na povećanje efikasnosti, na primer, imaju bolji odziv na poreske olakšice od drugih vrsta SDI. Azemar i Desbordes [32] smatraju da je pad od 10 odsto prosečne efektivne poreske stope u zemlji domaćinu povezan sa 7,7 odsto većom prodajom američkih multinacionalnih filijala u Sjedinjenim Državama, u odnosu na 1,2 odsto većom prodajom lokalnih filijala. Ovi nalazi ukazuju da poreski podsticaji imaju veći efekat na vertikalne, izvozno orijentisane SDI, nego na horizontalne, tržišno usmerene SDI.

Uprkos tempu ekonomske globalizacije, liberalizacija ulaznih režima za SDI može se suočiti sa snažnim protekcionističkim otporom. U mnogim zemljama argumenti "nacionalnih interesa" i "strateški osetljivih industrija" često se koriste za opravdanje postojanja barijera za ulazak SDI, zbog straha od konkurencije i drugih motiva protekcionista [33].

Između 2000. i 2013. godine, udeo ograničenja SDI i prekomerne regulacije u merama politika uvedenih za upravljanje SDI povećan je sa 6 na 27 odsto. Mada se skoro polovina ovih mera primenjuje u svih sferama, većina specifičnih industrijskih mera primenjuje se na usluge [1]. U većem delu literature potvrđeno je da ulazne barijere, uključujući i zahteve u pogledu performansi koji utiču na uspostavljanje investicija, mogu znatno sprečiti SDI i trgovinu u uslugama.

6. ZAKLJUČAK

U literaturi se navode uverljivi slučajevi napora zemalja domaćina u cilju privlačenja, omogućavanja ulaska, zadržavanja i povezivanja SDI sa domaćom privredom. Koristi od SDI su mnogo veće od dobijanja dodatnog kapitala, i uključuju povećanje produktivnosti, poboljšanje izvoza, generisanje znanja i povećanje plata. Međutim, takve potencijalne koristi nisu automatske, jer mogu biti potrebne intervencije politike da se odgovori na specifičan kontekst u pogledu zemlje i investicija. Takođe, postoji snažan argument za izgradnju investicione klime kako bi se maksimirala potencijalna prelivanja, kao i povećanje konkurentnosti zemalja za SDI. Istovremeno, zemlje potencijalni domaćini SDI moraju imati na umu da različite vrste SDI generišu različite ekonomske, socijalne i druge koristi u kratkom i dugoročnom periodu.

Pregled literature je pružio dokaze o višedimenzionalnoj složenosti investicionih politika. Ne samo da postoje brojne varijable koje mogu uticati na privlačnost, zadržavanje, povezivanje i druga prelivanja SDI, nego postoje i različite vrste SDI. Svaka od njih zahteva diferencirane mešovite politike kako bi se povećale potencijalne koristi. Značajan deo literature u kojoj se analiziraju SDI bavi se iskustvima u jednoj određenoj zemlji i u jednom sektoru u datom periodu. S druge strane, SDI se analiziraju kao homogena pojava. Takva dvojnost otežava vladama da izvuku pouke iz postojećih dokaza – često izvedenih iz različitih konteksta – u svrhe kreiranja politike. Vladama su potrebni okviri koji su dovoljno jednostavni da im omoguće da izvuku logičke zaključke i jasno organizuju i odrede prioritete višestrukih i složenih varijabli koje utiču na maksimiranje koristi od različitih vrsta investicija. Međutim, kreatorima politike su, takođe, potrebni dovoljno sofisticirani okviri za razlikovanje različitih vrsta SDI, uključujući potencijalne izazove i koristi za razvoj. Čini se da postoji praznina u literaturi o investicionoj politici koja povezuje ova dva zahteva, čije prevazilaženje bi bilo presudno u pomaganju vladama zemalja u razvoju da osmisle koherentan skup politika kako bi se maksimizirale koristi od SDI.

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SYSTEMS OF COMPANY MANAGEMENT IN MACEDONIA

СИСТЕМИ ЗА УПРАВУВАЊЕ СО КОМПАНИИТЕ ВО МАКЕДОНИЈА

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Abstract: *Successful management of companies depends on the corporate governance, i.e. on the supervision and control of the company. However, the choice of one of the systems of corporate governance (one-tier and two-tiered system) is really complex, and at the same time it is a key issue that every business entity faces at the beginning of its business venture. The basic criterion for distinguishing these two basic models of company management for corporate governance is the way of organizing management functions and oversight. Hence, the main goal of this paper is to analyze, first and foremost, the two management systems, and then to see the differences and common features that these models possess. Knowledge of this paper are the various models of corporate governance (one-tier and two-tier) through the prism and the development of corporate governance in the Republic of Macedonia. In this way, our intention with this paper is to help decision-makers in the companies (i.e. managers, directors, owners, shareholders) to choose the right and the best management model for their business entity.*

Keywords: *corporate governance, one-tier system, two-tier system, company, management.*

Содржина: *Успешното раководење со компаниите зависи од менаџирањето, односно од надзорот и контролата на компанијата. Но, изборот на еден од системите на корпоративно управување (едностепенот и двостепенот систем) е навистина сложено прашање со кое се соочува секој деловен субјект на почетокот на својот деловен потфат. Основен критериум за разликување на овие два модели на управување со компаниите е начинот на организирање на функциите на управување и надзор. Оттаму, основната цел на овој труд е да се анализираат најпрвин поединечно двата системи на управување, а потоа да се согледаат разликите и заедничките карактеристики кои ги поседуваат. Значи предмет на истражување на овој труд се различните модели на корпоративно управување низ призмата и развојот на корпоративното управување во Македонија. На овој начин, нашата интенција со овој труд е да им помогне на носителите на одлуки во компаниите (односно на менаџерите, директорите, сопствениците, акционерите) да го изберат вистинскиот потточна најдобриот модел на управување за својот деловен субјект.*

Клучни зборови: *корпоративно управување, едностепен систем, двостепен систем, претпријатие, управување.*

1. WHICH SYSTEM OF CORPORATE GOVERNANCE SHOULD WE CHOOSE?

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Today, the modern companies are facing perhaps the eternal dilemma - *which corporate governance system to choose, without making mistakes in the selection?* [1]

The practice of companies around the world shows that *there is no ideal and perfect model of corporate governance*, and hence this leaves the companies to choose whether to apply one-tier or two-tier system of corporate governance. [2]

However, *there is an unwritten rule and belief* that companies in the European countries increasingly apply the two-tier corporate governance system, while those belonging to the Anglo-Saxon legal system prefer one-tier system of corporate governance.

For *the companies in the Republic of Macedonia*, this issue is regulated by *the Law on Trade Companies*, within which foresees the possibility of choice of one-tier or two-tier system of corporate governance without imposing or favoring one of those two systems.

According to this Law, the authority of management and control system in one-tier system of corporate governance is the *Board of Directors*, while in the two-tier system of corporate governance, there is a clear separation between the *Management Board and the Supervisory Board*. [3]

Here, the governance and the management is entrusted to the Management Board, while the control and the supervision is in the hands of the Supervisory Board (or the controller) whose authorizations are connected with the supervision over the company's operations, particularly over the operations of the management bodies. [4]

2. ONE-TIER VERSUS TWO-TIER CORPORATE GOVERNANCE SYSTEM

In order to determine which model of corporate governance is better, we have to define and analyze separately the two types of corporate governance systems.

In *one-tier system of corporate governance* there is one single authority for management and control, and that is the Board of Directors.

The *Board of Directors* shall consist of at least 3 and a maximum of 15 members, who are elected by the General Meeting of Shareholders, and it is composed of Executive and of Non-executive members.

The *Executive members* have the task of running the company or managing the company in a way that would achieve the best effect for the company, while the *Non-executive members* are tasked to lead supervise and control the work of the Executive members.

The Board of Directors shall elect its *President* from the rank of its Non-executive members, by majority votes out of the total number of members of the Board of Directors. [5]

One of the Executive members of the Board of Directors can bear the title which is typical for the exercise of the office (general director, chief executive director, and other appropriate titles), and the other Executive members can bear the title which is typical for the exercise of the office entrusted to them as Executive members of the Board of Directors.

The Board of Directors, during the year, shall mandatory hold at least four regular meetings every three months, wherefore one is mandatory held within a time period of one month before the annual Assembly. These meetings are in order to make strategic decisions, planning, development, regulations for the company, etc. [6]

In one-tier system of corporate governance there is a functional and organizational separation of the roles of those who run the company's operations, from those who oversee their work. The Executive and Non-executive members of the Board of Directors have the same rights and responsibilities, but different powers to companies.

The *criticism* which refers to this corporate governance model is the possibility the Non-executive members to be influenced by pressures from the Executive members, and thereby be called into question their objectivity in carrying out their tasks.

Unlike the one-tier corporate governance system, in the *two-tier corporate governance system* there is a clear separation of administrative and supervisory function, i.e. there is *Management Board and Supervisory Board*.

The *Supervisory Board* is composed of the Non-executive members elected by the General Meeting of Shareholders, and their number should be odd (at least 3, and no more than 11 members), and it has the task of mediating between the owner and the management, and to supervise and control the operation of the Management Board on behalf of shareholders, which is actually the primary task.

The *Supervisory Board* can inspect and check the books and documents of the company, as well as the assets, in particular the treasury of the company and the securities and goods. The Supervisory Board can oblige certain members of the board, the authorized auditor or experts, to carry out certain expert matters of supervision.

The *Management Board* has at least 3 members appointed by the Supervisory Board, and at least 11 members, and is responsible for matters relating to the management of the company. The members of the Management Board representing the company can bear the titles General director or other title. [7]

The purpose of the shareholders is to hire people who are the most competent to conduct the affairs of the company.

The *President of the Management Board* shall convene and chair the meetings, and shall be responsible for keeping the minutes of the meetings and organizing other forms through which the Management Board operates and decides. If the President, for any reason, is not able to exercise his/her function, or if he/she is absent, the meetings of the Management Board shall be chaired by a member of the Management Board, appointed by the Supervisory Board. [8]

The *Management Board* shall manage the company, and within that framework, shall conduct the operations of the company at its own responsibility. The Management Board shall have the broadest authorizations in managing the company, undertaking all matters related to the management of the operations and the day-to-day activities of the company, and acting, in all circumstances, on behalf of the company, within the scope of operations of the company, except as to the authorizations explicitly granted to the Assembly and the Supervisory Board.

The *two-tier system of governance* in most countries where it is accepted is characterized by the formation of a *Committee by the Supervisory Board* in order to achieve greater success, objectivity and efficiency in the supervision and control of the corporation. [9]

So, the main objective of the one-tier system of corporate governance is to protect the interests of the owner (shareholder), while the two-tier corporate governance system purpose is to protect the minority shareholders by limiting shareholders who have effective control of management. [10]

3. WHAT ARE THE DIFFERENCES AND THE COMMON FEATURES OF THESE TWO MODELS?

Once we analyzed the one-tier and two-tier system of corporate governance, we arisen the question: *what are the differences and common features of these two models?*

The *main feature of the one-tier system of corporate governance* is the existence of a single authority to control and manage, who has the keyword in the company, and it is the *Board of Directors*.

The *Board of Directors* brings strategic decisions, leads the management of the company, and brings efficient and effective decisions. This body entrusts the daily operations of the company on certain executive board members who manage the company under the supervision of *Non-executive members of the Board of Directors*.

The *Non-executive members* are seconded to the management of the company, while the *Executive board members* are fully engaged in the direct control of the company.

On the other hand, *the main feature of the two-tier corporate governance system* is that there is a clear separation between the management and control. The management is entrusted to the *Management Board*, and the control is in the hands of the *Supervisory Board*. [11]

Despite the existence of different characteristics between these two models of corporate governance, they possess certain *common characteristics*, namely: [12]

Independent members - both one-tier system or the Board of Directors, and the two-tier system or the Supervisory Board, have an obligation in their composition to have an independent members in order to provide greater transparency, objectivity and impartiality in the performance of tasks, as well as protection of minority shareholders.

Cumulative voting - each company individually determined it as a possibility in its constitution, and under cumulative voting means voting members of the Board of Directors or Supervisory Board where the shareholder can give all voices during the election of members to Board of Directors or Supervisory Board, or can freely allocate the votes to one or more candidates, whereby he selects between majority and cumulative voting. This practically means that as a shareholder entitled to more votes in the company, their voices can give them to one candidate or cumulatively to more nominees, whereas candidates who received the most votes are elected as independent members.

Formation of Committees of the Board of Directors or Supervisory Board - these Committees have an advisory function, and they only give opinions and recommendations that assist in making a decision in the company. Commonly they formed three committees, namely: Audit Committee, the Remuneration Committee and the Commission for Revocation.

Statutory responsibility of the Board of Directors or the Management and Supervisory Board - it is a responsibility to perform the entrusted mandate and the results of that mandate entrusted by the members of which it is entrusted. The severest sanction of the members is the ability to be recalled from office on which are placed, whereby the decision on dismissal of members of the Board of Directors or the Supervisory Board is adopted by the Assembly of Shareholders, while the decision on dismissal of Executive members is adopted by the Board of Directors or by the Supervisory Board.

Liability for causing damage to the company by the members of the Board of Directors, i.e. the Management and Supervisory Board - all members are subject to liability for damages if they did not work and did not act as bona fide trader, since all of them are expected to be caring, active and reasonable exercise of entrusted powers. [13]

From all of this that we mention above, *we can conclude that* the system of corporate governance of companies possesses very different characteristics, but also there are some common characteristics that one-tier and two-tier system of corporate governance possess.

CONCLUSION

The laws of the legal systems envisage that the management of a company can be in a one-tier or two-tier system, where the company itself has the right to its own choice. The *purpose of these two models of corporate governance* is to enable the achievement of positive results in the company's operations.

If *one-tier system of corporate governance* is chosen, this means that the overall management, control and oversight of the company will be carried out by the Board of Directors, which is composed of Executive and Non-executive members.

The choice of the *two-tier corporate governance system* means the existence of a Management and Supervisory Board, and the Management Board manages the company and day-to-day operations, while the Supervisory Board controls, supervises and monitors the work of the members of the Management Board.

Despite the many differences between these two models, there are also *common features*, i.e. Independent Members, Cumulative Voting, Formation of Committees of the Board of Directors or Supervisory Board, Statutory responsibility of the Members of the Board of Directors or of the Management and Supervisory Board and responsibility for causing damage to the company by the members of the Board of Directors i.e. Management and Supervisory Board.

Our *conclusion* is that both of the two basic systems of corporate governance have their own positive and negative sides, and each company has to decide which of these two systems of corporate governance is better for its operation.

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UTICAJ UPRAVLJANJA PERFORMANSAMA NA EFEKTE UPRAVLJANJA KVALITETOM KOMPANIJE

INFLUENCE OF PERFORMANCE MANAGEMENT ON COMPANIES QUALITY MANAGEMENT EFFECTS

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Sadržaj: *Kompanije posvećene kvalitetu procesno su orijentisane, sa stalnim fokusom na unapređenja i optimizacije u cilju davanja željenih vrednosti krajnjem kupcu. Robustan i efikasan način merenja performansi uspostavljenih procesa neraskidiv je deo Demingovog ciklusa s obzirom da su upravo rezultati merenja inicijatori potrebe za unapređenje i time postizanje superiornih i konkurentskih standarda. Cilj rada je da ukaže na značaj uspostavljanja i prilagođavanja procesa upravljanja performansama kako procesa, tako i zaposlenih i njihov uticaj na efekte upravljanja kvalitetom kompanije. Autor u radu iznosi osnovne teoretske definicije i principe upravljanja performansama, kao i iskustva velikih svetskih kompanija prikazana u različitim izvorima, analizirajući načine primene i promene koje se dešavaju u ovim procesima. Dalje, autor analizira na koji način pozitivni i negativni efekti upravljanja performansama mogu uticati na rezultate upravljanja kvalitetom. Poseban osvrt napravljen je na upravljanje performansama zaposlenih i glavne izazove koje ovaj proces iznosi pred menadžere, s obzirom da su ljudi glavna vrednost i nosioci rezultata kompanije. U zaključnim razmatranjima rada ustanovljeno je da uspostavljanje kvalitetnog i efektivnog procesa upravljanja performansama procesa i zaposlenih može imati direktan uticaj na kvalitet i time značajan doprinos uspehu kompanije. Posebno je istaknut značaj kontinuiranog unapređenja i upravljanja promenama u procesima upravljanja performansama zaposlenih, baziran na iskustvima pre svega velikih korporacija iznetim u novim trendovima upravljanja performansama zaposlenih.*

Ključne reči: *upravljanje performansama, upravljanje kvalitetom, performanse procesa, performanse zaposlenih, kontinuirano unapređenje procesa.*

Abstract: *Companies devoted to Quality are process-oriented, with a constant focus on improvements and optimizations in order to give desired value to the end customer. A robust and efficient way of measuring the performance of established processes is an inseparable part of the Deming cycle, since the results of the measurement are the initiators of the need for improvement and thus lead to achievement of superior and competing standards. The aim of the paper is to point out the importance of establishing and adjusting the process of managing performance of both processes and employees, and their impact on the effects of company quality management. The author presents the basic theoretical definitions and principles of performance management, as well as the experience of large world companies presented in various sources, analyzing the methods of implementation and changes that occur in these processes. Furthermore, the author analyzes how the positive and negative effects of performance management can affect the results of quality management. A special attention was given on managing the performance of employees and the main challenges that this process brings to managers, since people are the main value and carriers of the company's results. In*

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concluding paper review, it is concluded that establishing a quality and effective process of managing process performance and employees can have direct impact on quality and thus add significant contribution to the success of the company. Particular emphasis is put on the importance of continuous improvement and management of changes in employee performance management processes, based on the experience of large corporations and new management performance trends.

Keywords: *performance management, quality management, performance process, employee performance, continuous process improvement.*

UVOD

Upravljanje performansama kao ideja pojavljuje se u industrijskoj revoluciji nakon prvog svetskog rata, ali se zaista razvija nakon drugog svetskog rata zajedno sa ostalim unapređenjima koje je u industriji doneo taj period. Pre svega javlja se potreba za priznavanjem kvaliteta i učinka zaposlenih, ali i pitanja opravdanosti plaćanja zaposlenih u određenom iznosu. Od tada su procesi upravljanja učinkom postali mnogo sofisticiraniji i evoluirali su tako da obuhvate ne samo ocenjivanje zaposlenih već i oblasti kao što su kompetencije, povratne informacije i planiranje razvoja. Poslednjih nekoliko godina došlo je do ekspanzije promena u principima upravljanja performansama, zasnovanih u pravcu kontinuirane otvorene komunikacije između zaposlenih i menadžera, fokusom na razvoj zaposlenih i njihovu motivaciju i razvoj, kao i transparentnost procesa. U skladu sa razvojem tehnologije mnoge kompanije razvile su i posebne programe namenjene upravljanju performansama, sa naglaskom na mogućnost davanja povratne informacije od zaposlenog ka menadžeru podjednako bitne kao i ocene menadžera ka zaposlenom.

U samom početku razvoja organizacije su koristile upravljanje učinkom da bi upravljale ponašanjem zaposlenih kako bi dobili konkretne rezultate. U praksi je to dobro funkcionisalo za određene zaposlene koji su bili isključivo vođeni finansijskim nagradama. Međutim, tamo gde su zaposleni bili vođeni učenjem i razvojem svojih veština, to je propalo. Jaz između opravdanja plata i razvoja veština i znanja postao je veliki problem u korišćenju upravljanja učinkom. To je postalo očigledno krajem 1980-ih; shvatanje da je potreban sveobuhvatniji pristup upravljanju i nagrađivanju. U zemljama anglosaksonskog govornog područja upravljanje performansama je predmet kako naučnih radova tako i rada samih kompanija na razvoju modela, unapređenju i prevazilaženju izazova u oblasti. Ovo se svakako može povezati sa razvijenom tržišnom ekonomijom, najčešće sa težnjom multinacionalnih korporacija za optimizacijom i usklađivanjem sa dinamičnim okruženjem konkurencije.

Poslednjih decenija, proces upravljanja ljudima postao je formalizovaniji i specijalizovaniji. Mnoge od starih metoda ocenjivanja rada apsorbirane su u koncept upravljanja učinkom, koji ima za cilj da bude opsežniji i sveobuhvatniji proces upravljanja. Neki od pravaca koji su oblikovali upravljanje performansama u poslednjih nekoliko godina su diferencijacija zaposlenih ili upravljanje talentima, upravljanje ciljevima i stalno praćenje i evaluacija.

Iako na prvi pogled direktna veza može izostati, principi upravljanja kvalitetom široko su rasprostranjeni u principima upravljanja performansama. PDCA princip neophodan je deo uspostavljanja i održanja samog procesa upravljanja performansama. Sa druge strane samo upravljanje performansama doprinosi postizanju ciljeva kvaliteta zbog toga što su zaposleni nosioci procesa i stepenom svog zalaganja direktno utiču na kvalitet krajnjeg proizvoda.

DEFINICIJA SISTEMA UPRAVLJANJA PERFORMANSAMA

Bititci, Carrie i McDevitt [1] definišu upravljanje performansama kao “proces kojim kompanije upravljaju učinkom u skladu sa korporativnom strategijom i ciljevima”. Prema njima cilj ovog procesa predstavlja uspostavljanje integrisanog kontrolnog sistema, u okviru kog su korporativna i funkcionalna strategija primenjeni na sve poslovne procese, aktivnosti, zadatke i zaposlene, a povratna informacija kroz sistem merenja performansi omogućava donošenje adekvatnih odluka menadžmenta. Krajni cilj procesa je unapređenje performansi kompanije.

Merenje performansi je esencijalni deo upravljanja performansama. Merenjem se vrši transformacija složenih poslovnih procesa u pojednostavljeni numerički pregled, koji se lako može komunicirati i dovesti do adekvatnih rezultata [2]. Efikasno upravljanje performansama počiva na jednostavnom principu da se "ono što se meri uradi." U idealnom sistemu, biznis stvara kaskadu metrike i ciljeva, od svojih strateških ciljeva najvišeg nivoa do svakodnevnih aktivnosti svojih radnika. Menadžeri stalno nadgledaju ove metrike i redovno se povezuju sa svojim timovima kako bi razgovarali o napretku u ispunjavanju ciljeva. Dobre performanse se nagrađuju; nedovoljna uspešnost pokreće akciju za rešavanje problema.

U literaturi se može naići i na nešto drugačije definicije, [3] grupa autora ga definiše kao proces određivanja koliko su organizacija ili pojedinac uspešni u postizanju definisanih ciljeva. Uspostavljajući vezu sa TQM (Total Quality Management) Sinclair D. i Zairi M. [4] definišu ga kao merenje nefinansijskih performansi na svim nivoima organizacije (uključujući pojedince, timove, procese, odeljenja i organizaciju kao celinu), uz perspektivu kontinuiranog unapređivanja performansi u skladu sa ciljevima organizacije. Autori preuzimaju definicije merenja performansi i sistema upravljanja performansama i povezuju ih sa principima upravljanja kvalitetom. Merenje performansi predstavlja numerički ili kvantitativni pokazatelj uspešnosti ostvarivanja ciljeva [5]. Sistem merenja performansi predstavlja sistematski način evaluacije ulaza, izlaza transformacije i produktivnosti u proizvodnim ili neproizvodnim operacijama, a povezan sa principima Kvaliteta može se definisati kao sistem koji integriše merenje nefinansijskih performansi na svim nivoima organizacije uz perspektivu kontinuiranog unapređenja performansi u skladu sa ciljevima organizacije.

Može se zaključiti da ne postoje suštinske razlike i da se proces zasniva na praćenju postizanja ciljeva kroz merljive parametre. Veza sa upravljanjem kvalitetom prirodno je bazirana na potrebom za unapređenjima jer ona jedina i može dovesti do ostvarivanja ciljeva i povećanja efikasnosti i efektivnosti kojima sve kompanije danas teže. Fokusiranje na merenje nefinansijskih ciljeva je moguće samo delimično s obzirom da se strateški ciljevi kompanije uvek vezuju i za finansijski uspeh.

Izmerene performanse nemaju efekte ukoliko nisu iskomunicirane sa zaposlenima koji u procesima učestvuju. Ovaj element upravljanja performansama podjednako je značajan kao i samo merenje procesa i mora biti na pravi način osmišljen i izvršen. Kompenzacije koje su posledica zaključaka evaluacije performansi zaposlenih prisutne su na različite načine u svim kompanijama koje primenjuju principe upravljanje performansama.

IMPLEMENTACIJA SISTEMA UPRAVLJANJA PERFORMANSAMA

Prvi korak u uspostavljanju efektivnog Sistema jeste definisanje ciljeva u skladu sa strategijom odnosno misijom i vizijom kompanije. Može se zaključiti da dobro uspostavljen sistem Kvaliteta predstavlja čvrstu osnovu za implementaciju sistema upravljanja performansama.

Tako definisane ciljeve neophodno je zatim „kaskadirati“ odnosno preneti na sve nivoe u kompaniji, imajući u vidu dve značajne komponente:

Jasnu povezanost na koji način ostvarenje pojedinačnog cilja doprinosi razvoju kompanije; Merljivost cilja i kriterijume uspešnosti realizacije cilja.

U ovoj fazi uspostavljanja na snagu stupa definisanje KPI (Key Performance Indicators) odnosno ključnih indikatora performansi. KPI predstavljaju vrednost kojom merimo uspešnost i/ili efektivnost procesa. Indikatori mogu biti osmišljeni tako da predstavljaju meru Kvaliteta određenog procesa, na kvantitativan način. Indikatori performansi najčešće jesu kvantitativni odnosno izraženi u brojevima. Popularan je način provere da li su KPI uspešno definisani da budu u skladu sa SMART principima (Smart, eng.pametni):

Specific – odnosno jasno specificirani, definisani;

Measurable - merljivi;

Attainable – dostižni, realni ciljevi;

Relevance – relevantni za biznis;

Timeframe – definisani u vremenu.

Metrika koju kompanija izabere mora zaista da promoviše performanse koje želi. Značajno je i da tako određeni KPI budu deo zajedničke karte (Scorecard) kako bi pored svoje realizacije zaposleni imali priliku da dobiju širu sliku, uticaja njihove produktivnosti i efikasnosti na procese drugih kolega, ali i na ostvarenje ciljeva delova organizacije i cele kompanije. Treba izbeći situacije u kojima se realizacija ciljeva i unapređenje procesa zasnivaju isključivo na sopstvenim rezultatima, a ne na performansama svih promena tokom celog dana. U najboljim sistemima za upravljanje performansama, cela organizacija funkcioniše iz jedne perspektive, i svi zaposleni razumeju ukupne performanse organizacije i kako su doprineli tome. Ovakve kompanije uspevaju da povežu finansijske KPI koji su fokus akcionarima i upravnom odboru sa proizvodnim metrikama koje su važne na terenu. Zaposleni prve linije mogu da vide „nit“ koja povezuje njihove dnevne performanse sa performansama njihove organizacione celine, ali i kompanije u celini.

Slika 4. Primer pravilnog definisanja i povezivanja KPI u jednoj kompaniji [6]

| Nivo | Indikator performansi | Akcija |
|--|---------------------------------------|---|
| CEO | EBITDA | “Naša ključna vrednost je proizvodnja” |
| Generalni menadžer | Godišnja proizvodnja | “Moramo identifikovati usko grlo i probleme sa opremom koji se ponavljaju” |
| Menadžer operacija | Dnevna produkcija | “Put kompresora je glavni problem koji se stalno ponavlja i moramo rešiti uzrok problema” |
| Supervizor | Smenska produkcija Smenski trening | “Uzrok problema je identifikovan. Moramo da obučimo operatore kako bi pratili procedure čišćenja” |
| Operator | Poštovanje standardne procedure | “OK, pratićemo procedure” |
| <i>Svi razumeju i sprovode</i> | | |
| Ciljevi moraju biti prilagođeni svakom nivou kako bi imali smisla | | |

Jedan od izazova sa kojim se susrećete prilikom definisanja KPI jesu targeti. Izbor pravih targeta predstavlja nauku, ali i umetnost. Podrazumeva uključivanje psiholoških principa, pre svega motivacionih modela zaposlenih sa jedne strane, a sa druge statističko sagledavanje

podataka o performansama. Ako su suviše lako dostižni, neće dovesti do poboljšanja performansi. Ako su van domašaja, osoblje neće ni pokušati da ih dostigne. Najbolji ciljevi su dostižni, ali sa potrebnim elementom izazova.

Uopšteno gledano, zaposleni koji postavljaju svoje ciljeve imaju tendenciju da imaju veći osećaj vlasništva i posvećenosti njihovom ostvarenju nego oni čiji su ciljevi jednostavno nametnuti odozgo. Upravljanje performansama ne funkcioniše bez česte, iskrene, otvorene i efikasne komunikacije. Metrika nije pasivna mera napretka, već aktivni deo svakodnevnog upravljanja organizacije. Svakodnevne promene, smernice za alate, preglede nakon akcije, i slično, pomažu da se uključe članovi tima i da se zadrži fokus na obavljanju onoga što je najvažnije. Primena petlje povratnih informacija “ plan–do–check–act ”, pomaže timovima da uče iz svojih grešaka i identifikuju dobre ideje koje se mogu primeniti na drugim mestima. U mnogim kompanijama sa visokim performansama, supervizori deluju kao treneri i mentori [6].

Iako razvoj modernog pristupa upravljanja performansama promovise odvajanje procesa od materijalne kompenzacije performanse moraju imati određene posledice. Nagrađivanje dobrih performansi smatra se važnijim od kažnjavanja loših performansi. Na raspolaganju su različite vrste formalnih i neformalnih sistema priznavanja i nagrađivanja, ali malo njih čini dovoljno za izgradnju ove vrste morala, bilo po obimu ili frekvenciji, ali one moraju imati potporu u kulturi kompanije i prihvatanju zaposlenih. Prepoznavanje dobrog rada pojedinaca i timova mora biti stalno zastupljeno u aktivnostima menadžmenta kompanije. Da bi govorili o nematerijalnim načinima motivacije, zaposleni moraju imati preko primanja ispunjen osnovni, higijenski nivo sredstava za život. Nematerijalni načini motivacije moraju se dalje prilagođavati kulturi zaposlenih, njihovim vrednostima, motivacionim modelima. Nekim osobama izlazak od nekoliko sati ranije petkom, kako bi ih proveo sa porodicom predstavlja najveću motivaciju dok će za drugog zaposlenog to biti javno priznanje i prilika da prezentuju svoj rad pred menadžmentom kompanije. Na raspolaganju su i obuke, organizacija neformalnih druženja sa timom, upoznavanje sa radom drugih procesa u kompaniji i mnoge druge.

Interakcije menadžmenta sa osobljem prve linije su izuzetno moćan alat za upravljanje performansama. Oni šalju poruku da se zaposleni poštuju kao stručnjaci u svom delu poslovanja, daju menadžerima mogućnost da deluju kao uzori, i mogu biti brz način za rešavanje problema i identifikaciju poboljšanja. Preuzeta iz Lean i Kaizen filozofije, Gemba šetnja kao oblik interakcije predstavlja takođe značajnu podršku upravljanja performansama. Gemba [7] je japanska reč koja ima značenje „na stvarnom mestu“ u smislu na mestu gde se proces odvija. U praksi predstavlja odlazak menadžmenta na mesto odvijanja procesa, i ističe značaj razumevanja dešavanja od strane menadžmenta, procesa na svim nivoima u kompaniji. I ovde, u sinergiji, efekat daju alati TQM-a i menadžmenta. Cilj Gemba šetnje je približavanje zaposlenih i menadžera, kao i omogućavanje kontinuiranog unapređenja procesa.

Još jedan često korišćen alat u upravljanju performansama zaposlenih jesu i Kanban table, posebno u proizvodnim kompanijama. "Kanban" [8] je japanska reč za "vizuelni signal." Kanban tabla čini rad koji je svaki zaposleni, tim ili organizacija sproveo vidljivim svim zaposlenima. Kanban table uvek su praćene kratkim, dnevnim sastancima o postignutom učinku, izazovima i raspoloženju tima i time, pored toga što upravljaju performansama zaposlenih i procesa, podstiču razmenu informacija i pronalaženje prilika za unapređenje.

Slika 5. Šablon najjednostavnije Kanban table

| LISTA ZADATAKA | U TOKU | ZAVRŠENO |
|----------------|--------|----------|
| | | |

U kompanijama sa razvijenim upravljanjem performansama koriste se table performansi, koje će pored pojedinačnih zadataka sadržati i statuse definisanih KPI, kao i njihove preglede na dnevnom, nedeljnom, mesečnom nivou. Ovakve table vrlo često sadrže i elemente bezbednosti i raspoloženja zaposlenih, kao i osnovne KPI iz oblasti Kvaliteta rada, efektivnosti (praćenjem zadatih vremena potrebnih za realizaciju određene aktivnosti engl. Lead times i cycle times). I ispred ovih tabli vrši se kratko dnevno sastajanje, komentarisanje dana i definisanje akcija za unapređenje ili vraćanje sistema u sistem kontrole. Podrška menadžmenta i prisustvo ovim sastancima višestruko je značajna jer pomaže još jednom vezu menadžera sa procesima i zaposlenima i veće direktno uključivanje.

Slika 6. Izgled table sa performansama [9]



Jedan od preduslova uspešnog upravljanja performansama jeste postojanje standardizovanih procesa. Standardni rad [6] zasniva se na tri jednostavna pravila:
 postojanje standardizovanog i opisanog procesa za sve aktivnosti;
 svako mora imati znanje i sposobnost da ispuni taj standard;
 usklađenost sa pravilima se mora pratiti i meriti.

Standardni rad je neophodan na svim nivoima organizacije, uključujući svakako srednji i viši menadžment kompanije. U praksi ovo znači da se menadžeri moraju značajan deo svog radnog vremena posvetiti učešću i kontaktu sa zaposlenima, praćenju i evaluaciji rezultata upravljanja performansama, kao i podršku definisanju i realizaciji razvojnih ciljeva zaposlenih, razvoju i implementaciji motivacionih alata i uopšte dostupnost i podršku zaposlenima. Spremnost i sposobnost organizacije da održava upravljanje performansama u ritmu svakodnevnog rada zahteva odricanje, angažovanje resursa i značajnu promenu principa i kulture kompanije. No,

gledajući iskustva velikih svetskih kompanija, i rad koji ulažu u razvoj sistema i alata upravljanja performansama, angažovanje se višestruko isplati.

Jedan od svetskih lidera kompanija *General Electrics*, u zvaničnim izjavama velikim delom svog uspeha smatra i implementaciju uspešnog sistema upravljanja performansama zaposlenih. U toku 80-tih godina prošlog veka, predvođena Jackom Welchom kao generalnim direktorom, kompanija je razvila sistem rangiranja zaposlenih i kreiranjem grupa top, srednjih i zaposlenih sa lošim učinkom, sa materijalnom motivacijom za najbolje performere i otpuštanjem za grupu loših performerera. Evaluacija zaposlenih vršila se na polugodišnjem i godišnjem nivou kao i rangiranje zaposlenih. Od 2016.godine razvija novu platformu za upravljanje performansama zaposlenih, baziranoj na kontinuiranim povratnim informacijama, i upotrebi android platforme za prikupljanje podataka [7]

Kompanije Microsoft, Adobe, Accenture i Deloitte takođe su u procesu promene svojih sistema upravljanja performansama koje uključuju eliminaciju rangiranja zaposlenih i implementaciju kontinuirane komunikacije sa zaposlenima o njihovom učinku, fokusirane na razvoj zaposlenih. Na našim prostorima slične objave mogu se naći i na zvaničnim stranicama kompanija VIP, Delhaize i drugih multinacionalnih kompanija.

U studiji sprovedenoj i sumiranoj u seriji od tri rada [4], autori David Sinclair i Mohamed Zairi pokazali su da kompanije sa implementiranim principima upravljanja kvalitetom postižu bolje efekte prilikom uspostavljanja sistema upravljanjem performansi, uključujući i: upotrebu efikasnijih formalnih tehnika za upravljanje; češće koriste nefinansijske KPI na organizacionom nivou; primenjuju širi opseg merila performansi i koriste ih za veći obim primene.

Generalni je zaključak da je kod kompanija orijentisanih na upravljanje kvalitetom dolazi do veće efektivnosti upravljanja performansama na kompaniju.

ZAKLJUČAK

Značaj upravljanja performansama zaposlenim validiran je samom činjenicom da je predmet stalne evolucije u svim velikim multinacionalnim kompanijama koje su pri tome procesno orijentisane i posvećene kreiranju Kvaliteta za svoje vlasnike, korisnike i svoje zaposlene. U okviru samog procesa upravljanja performansama alati TQM nalaze primenu pre svega u potrebi kontinualnog unapređenja procesa. Pored toga analize slučaja pokazuju i da upravljanje performansama ima veće efekte kod kompanija koje se već zasnivaju na principima upravljanja kvalitetom. Razlog za ovo je svakako procesna orijentisanost, ali i postojanje i širokog korišćenja različitih alata TQM, standardnih procesa i aktivnosti i orijentisanosti prema internim kupcima podjednako kao i prema eksternim.

Posvećenost menadžmenta na svim nivoima ključni je element razvoja i održanja upravljanja performansama. Očekivanje je da menadžeri odvoje minimum polovinu svog vremena na podršku procesu upravljanja performansama, uključujući evaluaciju ključnih indikatora procesa, podršku unapređenju procesa i podjednako bitnu podršku razvojnim planovima zaposlenih, stalnu komunikaciju sa zaposlenima o njihovom napredovanju. Moderni alati na isti način uključuju i evaluaciju menadžera od strane zaposlenih kao podjednako važan deo upravljanja performansama.

Novi trendovi u upravljanju performansama zaposlenih pokazuju da su rangiranje i podela na dobre i loše performere prevaziđeni koncept koji se zamenjuje konceptom kontinuirane evaluacije i orijentacije na razvojne ciljeve i prilike za unapređenje. Naglasak je dat na odvajanje materijalne kompenzacije od upravljanja performansama, i fokusiranje na nematerijalne načine promocije i nagrađivanja zaposlenih, baziranih na njihovom razvoju i zadovoljstvu. U skladu sa razvojem tehnologija razvijaju se aplikacije koje omogućavaju davanje povratne informacije i uopšte prikupljanje podataka o performansama u svakom trenutku, čineći ih delom svakodnevnog zadatka zaposlenih i menadžera i podstičući otvorenost i komunikaciju.

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BUSINESS NEGOTIATING TACTICS: MODERN APPROACHES AND INSPIRATIONAL REVENUE-INCREASING TOOLS

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Abstract: *This chapter analyses and evaluates the current situation during business dealing with customers in order to improve it. Modern approaches and negotiating tactics are used. The analytical part of the chapter defines concepts such as business negotiation, communication process, business negotiator, customer and negotiating tactics. The application part of the chapter interprets results of research on behavior of customers and sale representative. To collect and analyze primary and secondary data, the questionnaire survey, controlled interviews and observing were used including own experience of the author of the chapter in communication with key customer during business negotiation. Proposals, recommendations and measures to improve the current situation were submitted. This was made in order to strengthen the current situation with customers/clients and to support creation of new business partnership which is based on trust, loyalty, satisfaction and interest of newly asked customers/clients who participate in the increase in demand on product/service.*

Keywords: *Business negotiation, business negotiator, communication process, customer, negotiating tactics.*

1. INTRODUCTION

Due to globalization and dynamic development of economic relations, the international trade is developing too. Thanks to the accelerating pace of development of foreign trade, business contacts on international level are founded. Growth of global economies supports the promotion of domestic enterprises in foreign markets where there is a clash and a subsequent convergence of cultures. Enterprises, products and other market segments are suppressed at national level and become part of the global market.

The aim of the chapter is to analyze the current situation during business dealing with customers/clients in chosen analyzed enterprise. Based on studies of primary and secondary resources, modern approaches to customer/client and own experience of the author, the aim is to propose improvement of the current situation in order to strengthen the current situation with customers/clients and to support creation of new business partnership which is based on trust, loyalty, satisfaction and interest of newly asked customers/clients who participate in the increase in demand on product/service.

The purpose of the chapter is to propose alternative ways of behavior and business negotiation which supports customer loyalty to product/service and stimulates mutual relationships and alliances between contract parties (business negotiators/customers).

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In the analytical part of the chapter, there are characterized concepts such as business negotiation, business negotiator, communication process, customer and negotiating tactics.

The application part of the chapter interprets the results of the research on business negotiators and customers/clients. To collect and analyze primary and secondary resources of data, the questionnaire survey and own experience of the author of the chapter in communication process and business negotiation were used. The method of observing and controlled interviews were used to support satisfaction, loyalty and retention of current customers with the accent of getting new, loyal clients/customers addressing the proposals and recommendations of an improved business relationship in accordance with the stated aims of the chapter.

2. LITERATURE REVIEW

Author [5] perceives business negotiation as an interview in which the role of interviewer and interviewed person changes. Through interview, one of the partner parties tries to convince the relevant participant of the dialogue about different forms and ways of behavior in terms of having united interest in products/services with the possibility of exploring or exchanging business offers, claims [11]. Authors [2], [7], [8] and [40] see business negotiation as an interactive communication process which might occur whenever we want something from someone else or when someone wants something from us.

Nowadays, the information is the most demanded article of business negotiation because it significantly influences summary evaluation of facts and enables negotiator and customer to make decision based on obtained facts, factual views and strategic considerations, claim [1], [26]. The main factor of business negotiation is time; argue [21], which are used during planning process, preparation for business negotiation and organization during the negotiation itself, summarize [17] and [37]. Through balanced dialogue time is optimally managed and in the case of unequal dialogue, time is manipulated and pressure options of aggressive and purposeful negotiation are actively used [27]. In the case of gradual or slower pace, participants in the dialogue may consider all available alternatives or seek concessions or acceptable deviations. Slow pace during business negotiation is logically beneficial as it blunts emotions and supports rational, conceptual thinking which avoids rapid reflection and, in most cases, suppresses random, unreasonable, and often squeamish decisions, says [33]. In order to gain customer's/client's confidence, business negotiator uses abilities to persuade, negotiate and realize real ideas and to manage situations and people, as communication is a decision-making power, expresses [7] and [30]. "Those who learn how to effectively use it might change own view on the world and even the view through which the world looks at them" [6]. Authors [25] propose that verbal and non-verbal communication in communication process often leads to discrepancies between words and behavior of participated subjects because speaker's effort is to hide communicated information and to cause listener's embarrassment to statements that can be understood in many ways. Non-verbal communication might be considered as more credible form of communication than verbal, express [35], which were supported by other author's findings [36] and with which the author of the chapter espouses. Non-verbal communication is used through gesticulation, smiling, frowning, moving chair closer to the other, touching the other person, raising voice or on the contrary when no information is shared. The most commonly used signals are e.g. body movements - gestures, illustrators, affective signs (mimic signs, i.e. movements that stimulate the emotional stimuli of body); hand gestures; regulators which monitor, control, coordinate or maintain speech of the other participant; adapters, i.e. gestures that satisfy personal needs [20]; body appearance; mimics; vision; spatial intimate, personal, social and public distances; colors; clothes, ornaments, fragrances; room decoration;

smell; gifts; touches; silence; use of time. The advantage of verbal communication is immediate feedback, flexibility and specification of emotional and non-verbal signals. On the other hand, the disadvantages are influence of communication barriers and noise, degradation of oral speech, especially when mediating or reproducing it, as well as it is time-consuming. The success of verbal communication is a careful consideration of each appropriately chosen word, comment [31]. During business negotiation, negotiator is influenced by his/her skills, e.g. flexibility, creativity, professional and general overview, empathy, team work ability [15] and ability to cope with his/her age, add [48]. The appropriate and competent business negotiator is a person who has great knowledge about discipline, general and professional overview, reasonably argues, negotiates and convinces partner during a common business meeting, acts confidently, responsibly and encouragingly. Self-confident business negotiator believes in himself, accepts opinions of the other partners, behaves credibly, smiles, looks positively, remembers names of people with who he spontaneously converses and then addresses them, say [92] and [19] predicts that successful business negotiator has to have high-level communication skills including stress resistance, ability to assess a business partner and specify his/her real interests and needs. Necessary skills and abilities of a business negotiator include personality intellectual [4], innovative and realistic judgement and perception, planning [23], conceptual and organizational skills [12], flexibility, creativity and objectivity, emotional maturity, e.g. honesty, ambition, discipline, perseverance, result orientation, assertiveness, enthusiasm, but also interpersonal skills, i.e. willingness to persuade, listen and communicate actively and openly. Mutual communication between business negotiator and customer should be equivalent, effective, positive and professional, expresses [10] and [27]. Customer's positive evaluation is achieved when business negotiator asks questions, listens and recommends appropriate solution, add [23]. Author [45] proposes that "people who are in the world of managers, dealers and diplomats say that appealing and persuasive person should have a pleasant smile, nice appearance and self-confidence". Customer is more interested in business negotiation when negotiator is elegantly dressed, observes the rules of social behavior (etiquette) but also entertainingly and pleasantly articulates. The appropriate dress code and nice outer look so-called outfit support "brilliant" image of participated persons in public space whose intent is to gain favor and maintain loyalty of customer/client. Outfit might cause "halo effect" for customer/client because the overall look, hairstyle, cleanliness, body smell and smiling look induce a favorable atmosphere of business negotiation, comment [33]. The author of the chapter agrees with content of a song created by Jan Werich and adds that "clothes make man".

Negotiating technics, so-called tactics, are an important part of business negotiation process. The planning activity includes collecting adequate information, as well as identifying the best alternatives and negotiating tactics which are used secretly, often aggressively and manipulatively during business negotiations. Significant elements of negotiating tactics are the first impression and the final reaction. Through the first impression and the first move, the necessary authority for successful business negotiation or even the superiority over the counterparty might be gained. Author [46] claims that the concept of negotiation always has to be modified according to given situation and stated goal. Based on negotiating tactics and formulated task, business negotiators of consultative as well as of conventional type are selected. Consultative business negotiator prefers to achieve a "win - win" consensus when participated contracting parties are fulfilled and satisfied, comments [14]. The most experienced and successful negotiators try to satisfy counterparty so that it does not leave business negotiation embittered and wounded. Consultative business negotiator has to be considerate to people with who he/she negotiates, because tactics such as threats, extreme or absurd demands, as well as ultimate are almost excluded in business communication. Negotiators have to

dedicate sufficient amount of time to make situation analysis of counterparty. Consultative negotiator has to respect statements of contractor with respect to facts which will follow because they create necessary demands and desires of counterparty. Business negotiator of unfriendly type has all instruments to use counterparty in favor of maximizing personal profit, says [43]. Type of negotiation of this tough business negotiator is so-called “win-defeat” because his/her aim is to have publicity in mass media and high market return, claims [44]. Business transactions are perceived as a one-off activity regardless of future existence. A business partner is seen as an enemy who must be defeated by all available and pressure instruments to achieve desired goal. The losing party tries to withdraw from a disadvantageous agreement, not to accept it or to repay his/her defeat, therefore it does not always bring this style of negotiation a guaranteed success, comment [20].

According to [13], the attitude of counterparties is important within personal sale because attitude and its change are pillars of negotiating whose aim is to influence mental condition of business partner through appropriately chosen form of communication. Author [22] divides business dialogue into introductory, informative, argumentative, presentation and final part. Within the introductory part of business dialogue, business partners are welcomed and business negotiation is started in order to get a customer, express [16]. The first impression, so-called “halo effect”, is decisive. Creating an optimistic atmosphere from the beginning of dialogue is a crucial part of success in business negotiations. During the informative part, the needs of partner are found out and necessary information is provided in order to attract an interest in realizing business activity. The argumentative and presentation parts convince customer that a business contract is convenient, stimulate business talent and affect the self-confidence of interested subjects, claim [42]. The final part creates space for dialogue about contract prices, business margin or traditional habits related to standard purchases. The risk of misgiving and fear of inattention or failure are the most common causes of unsuccessful business negotiation which was influenced by emotions, communicate [39]. In order to increase profits, it is necessary to create a favorable atmosphere, to develop trust and partnership especially for paying customers because people spend money in different ways. Some customers chronically shop. They make up the smallest group of shoppers, about 15%, spend without hindrance and regardless of price because shopping is an attraction for them. It is very easy to sell anything to chronic shopper; their enjoyment is emphasized. Savers occupy 24% of the global market and belong to a population group which does not abuse purchases or spend money for their own pleasure because money is, in their opinion, a non-renewable resource. They almost do not spend money, loss of money is an internal wrong for them because of which they feel remorse before and after purchase, comment [50]. It is really difficult to sell this group anything because in most cases they disagree with purchase and answer in advance that they are not interested in offer. This group of shoppers might be convinced by factual argumentation of graphically presented data and statistical surveys based on e.g. professional comparative study which is focused on rational rather than emotional judgment or it is possible to choose another form of follow-up survey, e.g. best practice that compensates for potential losses. 61% of average purchasing shoppers respond to advertising spots because they spend their leisure time searching for necessary sources of information before making their own purchases. A decisive factor in shopping habits is time which they invest to collect and search for necessary information to make a purchase [49]. Considering these facts, it is appropriate to address this group of shoppers during regular shopping in order to motivate regular shopping habits and support traditions, express [38]. According to above-mentioned definitions, business negotiation is a structured communication which tends to change initial differences in viewpoints (identical or opposing opinions and interests) and to overcome obstacles which might or could make concessions through mutual transfer of information (getting acquainted

with the opinions and requirements of at least two partner entities or groups) with the absence of authoritative authority.

3. METHODOLOGY AND OBJECTIVE

The aim of the chapter is to analyze the current situation during business dealing with customers/clients in chosen analyzed enterprise. Based on studies of primary and secondary resources, own experience of the author and modern approaches to customer/client the aim is to propose improvement of the current situation in order to strengthen the current situation with customers/clients and to support creation of new business partnership which is based on trust, loyalty, satisfaction and interest of newly asked customers/clients who participate in the increase in demand on product/service.

In order to respond to a marketing-oriented survey, research questions were formulated with a methodical support by questionnaire survey and controlled interview with Customer Service Manager. This is followed by a discussion section which includes interpretation of proposals and recommendations based on own experience in dealing with key customers/corporations according to the defined goal of the chapter. Research questions were stated as follows:

Is verbal and non-verbal communication during negotiation a key factor of success in business and sales process?

Do customers perceive the appearance and personality of business negotiators/dealers as a key priority during business negotiation?

To create this chapter, collection and analysis of primary and secondary data of currently offered products/services were realized including studies of professional literature and gathered resources, creation of literature review and formulation of theoretical knowledge from branch of business and sales, analysis of the current situation and adoption of professional themes, formulation of methods of solution, summary of documents intended for the introductory part of the chapter, i.e. production of obtained knowledge from book sources, interpretation and empirical generalization of knowledge and issues of given problematics, preparation and specification of research question and statements according to given aim of this chapter. The analyzed enterprise operating in the tourism industry was selected in locality České Budějovice, Czech Republic. The author examined business methods and offer of products/services of the enterprise, defined specific methods – questionnaire survey, method of observing, controlled interviews – dealing with Customer Service Manager about possibility to realize qualitative and quantitative research – specification of research questions – elaboration on obtained data and available information.

Questionnaire survey was realized to obtain information about business negotiations of business negotiators/dealers. The questionnaire was divided into six circles which were specified by thematic sections. The first section was focused on factors of addressing and selecting a business negotiator - see Questions 1 and 2 and Statement 1 and 2. In the second section, three further statements were made dealing with behavior of business negotiators/dealers towards customers/clients and whether customers agree or disagree with this behavior - more specifically see Statements 3 to 5. Regarding creation of an atmosphere which is suitable for business negotiations the third section was compiled which contains two statements. In the fourth section, there is Statements 8 to 14 which include physical appearance of business negotiators/dealers in conjunction with Question 3. The reason for creating this section was fact

that customers interact with the first impression of person they would be dealing with. In the fifth section, there were created two questions (4 and 5) which are thematically based on non-verbal communication of business negotiators/dealers and observing the intimate distance between participants of negotiation. Only one question related to the respondents' age was assigned in the sixth section. The reason for stylizing this question was to avoid getting answers from people under the age of 18 who do not yet have experience with business negotiators/dealers in a large proportion especially in terms of concluding business contracts as under-age people are ineligible for legal acts according to the Czech Civil Code.

The questionnaire consisted of 6 closed questions and one open question including 14 claims according to Likert scale. Asked respondents chose one from following options, i.e. I absolutely agree, I rather agree, I do not know, I rather disagree, I absolutely disagree. The questionnaire was distributed to respondents personally but also electronically in order to extend the way of communication with possibility to answers for a wider portfolio of target groups in population. Time allocation to fill the questionnaire was 10 days. The questionnaire was distributed to 85 respondents in 20 copies of which 15 fully completed copies were returned, i.e. 100 respondents from the České Budějovice locality in the Czech Republic in April/May, 2018 answered. Results were then graphically displayed in spreadsheet or graphical expressions in Microsoft Excel, interpreting results and discussions in the appropriate chapter.

After processing the data from the questionnaire survey and their interpretation, the controlled interviews with the business negotiator/dealer followed including observing to verify the obtained results and answer the questions perceived by the customer's/client's eyes. Customer Service Manager from the analyzed enterprise located in České Budějovice, Czech Republic was asked to answer controlled interview. The manager was asked due to professional orientation, many years of experience and practical skills in dealing with clients/customers/subordinate employees. The question was formulated: "What do you think about success of negotiations with customers/clients in terms of improving relationship with them?". The questionnaire consisted of three questions focusing on argumentation, communication, negotiation and presentation skills applicable within personal dealing. The last question was open for the purpose of expressing the manager's own opinion aimed at the results of the questionnaire survey. Controlled interviews took place at the Customer Service Centre in České Budějovice in April/May this year. The empirical generalization of the results is commented in the Results and discussion chapter.

The method of observing was applied during statistical survey within qualitative and quantitative research in the same period of this year and its results were also interpreted in the Results and discussion chapter.

4. RESULTS AND DISCUSSION

We were pleasantly surprised with the result of the answers we acquired in the first section of the questions because our assumption was not confirmed. We assumed that people would rather prefer to deal with sellers of older rather than younger age because they prefer professional skills and practical experience in the field with emphasis on social behavior and diplomatic behavior to clients/customers. In the analyzed company, age is not a priority decision magnitude when selecting a consultant so the Customer Centre selects experienced employees of all ages including juvenile communicative individuals with basic experience in business and sales as well as with pleasant appearance and image. The main techniques, tricks, practices and methods of persuasion and argumentation are used by business negotiators/dealers who exploit different

forms of communication to attract clients/customers. Negotiators try to influence and persuade them so they believe in the conveniently presented purchase of product/service. The advantage of a product/service is its effort to point out positive values and advantages and to convince consumers that the product/service is exceptional, unique, and incomparable and does not have any competition in the surrounding environment. Advertisements point out range of attributes of expected values of products/services which are most commonly recommended by well-known people who express their opinions and satisfaction with purchased product/service with possibility to gain discounts, bonuses, gift vouchers as well as different types of rewards such as quantity discounts from the usual price. Technique of using humor is a popular and very common element of business negotiation as it assumes that if a client/customer smiles or laughs he/she will better remember a product/service which he/she will be able to remember with pleasant feelings or enjoyment, communicates [32].

Through argumentation means of effective negotiation, the asked company which operates in the tourism industry appeals for gained results and numerical findings based on graphical and table expressions of analyzed conditions. These conditions are based on professional studies and calculations with numerical data, e.g. cost savings of selected products but also of various researches on advantages of products/services in comparison with competitors who appeal to customer/client and guarantee fidelity to contractual partner with possibility to choose more suitable variant of existing products/services. Prolonged opening hours are one of the key criteria for choosing products/services for new customers as competing companies in the same industry and location have limited opening hours (only to 5 p.m. twice a week from Monday to Friday and there is closed at the weekend). Another argument is to make references to benefits which were interesting for a low percentage of respondents (18%). The Customer Centre Manager estimated a higher percentage value than the one which was found out in the survey. The Customer Centre Manager emphasizes personal experience and positive references in business negotiations as well as examples of practical use of products/services offered in his/her own family which is very satisfied with the portfolio and recommends its further use. One of the respondents said that this argumentation is inappropriate to be included in business negotiation process because, in his opinion, it points to unethical and amoral elements of persuasion which affect behaviors and attitudes of purchasers. In persuading, it is possible to use the fear factor by showing negative consequences of shoppers' actions in case they do not change their opinion/attitude which is advised according to our requirements. Restrictions, threats and any suggestions or recommendations should be appropriately identified for a given group of people.

In today's turbulent, digital age of the 21st century, when preference for purchasing products/services is appeal for rising price levels, it is presumable that business dealers will most likely prefer orders in terms of price as people with lower cognitive capabilities are better influenced. It is necessary to mention that we are surrounded by people who do not consider the price scale as a priority. Authors [2] recommend to actively use the method of social approval in the negotiation process because the more we know people or communities that are satisfied with the offered service/product, the more likely it is to transfer positive recommendations and references to potential customers and new users. Change in behavior, attitude, and persuasions or in the involvement of one or more people affects the mental state of an individual through communication that influences a person's attitudes, thoughts, opinions, or behaviors. Rapid pace of speech points to the fact that it is a sophisticated and self-confident person. On the contrary, slow pace of speech can create the impression of a calm, less confident and uncertain person. Ways to increase credibility of communicator include eye contact, adequate gesture, relaxed and open attitude, volume and pace of speaker's voice but also his/her

outfit. Psychological and social factors or physical attractiveness play an important role in communication as attractive individuals are perceived as more successful, smarter and more convincing. The popularity of communicator also rises by use of sincere compliments and willingness to listen. The main tactics include presentation of arguments - logical justification, explanation and proving, using questions and challenges, expressing agreement or disagreement, appealing for emotions - reason, emotion, not the use of promises or threats, non-verbal communication, i.e. use of tone and body language. If participants in the communication process are perceived as equivalent partners and not as manipulators than ethics of dialogue are spontaneous, non-violent with the absence of manipulation techniques.

Negotiator might be entitled as a person who has excellent knowledge in his/her field. Majority of respondents agree that dealers have to perfectly know products/services offered by them.

Smile is an important part of the negotiator's personality. Also, it is one of the priority habits during business dealings as it creates a sense of confidence and self-confidence, relaxation, personal peace and serenity. Author [6] claims that smile is part of non-verbal communication. According to opinions of analyzed enterprise's employees, smile and nod are prerequisites for successful business dealings and negotiations. 62 respondents approve this statement. 24 respondents are not willing to trust dealer immediately and smile at him/her too because they perceive ironic subtext in non-verbal communication.

Author [22] claims that appearance of dealers is the first step to have successful business negotiation. Dress code is emphasized because clean and undamaged clothes of dealer psychologically causes a pleasant impression in a business relationship with customers and evokes credibility and professional image. What business clothes do customers perceive? Based on the questionnaire survey which included a question about choosing a dress code, the opinions on suitability of clothing vary. Some customers, especially older generation clients, see black outfit of dealer as a suitable one for funeral. It stimulates negative emotions and customers believe that business negotiations will be affected by gloomy atmosphere of sadness, depression, fear or anxiety fear of tragic events in the context of darkness and night. Younger generation of respondents has opposite view which was confirmed by results of Question 10. Younger generation between 15 and 30 years sees black color in the dress as fashionable and symbol of defiance or precursor to search own identity. Increase in the number of inhabitants in given localities is reflected by interaction between number of inhabitants and percentage of black color which grows with density of settlement in urban agglomerations. Middle generation between 45 and 60 years prefer blue color that is more sympathetic to men than women (a symbol of a return to the early-childhood jeans that reminds them of more peaceful lifestyle). Women prefer red color but also purple and pink because these are girls' colors that symbolize brightness, innocence and purity of girls. As age increases, the tendency to re-allocate warm colors increase in favor of cold colors. Red color is associated with happiness, love, romance and even anger. Color saturation becomes a less important factor in comparison with shade as a determinant of color preference.

According to social etiquette, business and diplomatic protocol of business clothing in the analyzed enterprise, women are not required to wear a jacket or blazer in workplace. The internal guidelines of the company are in accordance with dress code does not require or prescribe employees to do so. However, the author of the chapter asked questions: "Do customers/clients require dress code as a necessary part of business negotiation?" "How do they perceive and evaluate willingness of women to stand on social etiquette rules?" Author of many well-known professional books, named Špaček, interested in the area of etiquette rules,

recommends women to use multi-layered social clothing, the last piece of it should be jacket or blazer. According to opinions and answers obtained from the questionnaire survey and the formal interview, customers/clients consider use of dress code for women as optimal in favor of dress, jacket or skirts of average value. The asked Customer Centre Manager said that women should be dressed in dresses or skirts in normal working hours at workplace. The Customer Centre Manager wishes that female workers wear heel shoes however through the questionnaire survey it was found out that almost half of the respondents did not prefer heel shoes. The author of the chapter thinks that client's/customer's opinion is influenced by ignorance of social etiquette of business and diplomatic protocol for sales representatives/negotiators/dealers.

According to etiquette, men also have to wear prescribed clothes, i.e. suit or pants with a jacket from natural material. In the analyzed company, there is not stated what clothes men should wear when doing business but jeans are not tolerated. Tribal employees most commonly choose dark-colored trousers from suits, shirts or social shirts with jacket or sweater. The Customer Centre Manager recommends men to observe rules of dress code because, according to the opinions of professional and laic public, dealer/negotiator or sales representative should be dressed tastefully because they represent company, their position, social rank and authority in accordance with fashion trends. Dark suit with white shirt and tie is the most widespread dress code of representatives of companies and enterprises. Although 2% of respondents think that dealers can wear jerseys during business dealings with clients/customers. This low percentage can be considered as negligible because the "halo effect", i.e. the first impression in the perception of social perception and evaluation of people, is based on external appearance and surface criteria. According to experiment of Edward L. Thorndike, who published in 1920 a study conducted in 1915 which took place in two large industrial enterprises, research in the form of questionnaire and subsequent evaluation of correlations of individual sections confirmed relations between evaluation of physical characteristics, intelligence, leadership skills, personal qualities and general values of individual work. Consequently, author named Salamon Asche made several experiments on "halo effect" by using principle of using identical words in a different order which were ranked in positive - negative scale or by changing one word characterizing personality rather than physical appearance. The results of experiment pointed to fact that simple words that did not relate to physical appearance can affect idea about given individual. In interpersonal relationships in political, judicial, business or pedagogical environment, "halo effect" have a negative impact on subject, e.g. a five-minute delay or inappropriately selected clothing can have an independent effect on failure of output. The atmosphere of work and business environment is perceived as an important part of the initial, preparatory and opening phase of the negotiation process. Based on these facts, it is appealed for cleanliness, hygiene, safety, temperature conditions, but also office facilities. $\frac{3}{4}$ of the respondents perceive nice smell in office as a pleasant addition, because the sense of smell, as one of the human senses, affects the emotional area of brain which is linked to the experiences, situations or specific places of action. With increasing age, smells are enhanced; fragrant associations are more clearly perceived as they are most often related to personal relationships or home. Nice smell of dealer/sales representative or negotiator is evaluated by $\frac{1}{2}$ respondents as an important, decisive factor in choosing a service/product. Surveys at the same time point to fact that distinctive perfume scent negatively affects olfactory sensations of individuals because the over-used perfume dose dampens emotions and emotional experiences. This was confirmed by research which was made at the Faculty of Biology, University of Liverpool, UK in cooperation with the AXE Company. Based on measures of self-confidence and perception of their own attractiveness through filmed short videos with tested men, women said that when using an active spray, men seem to be more attractive compared to the same male object in photo. Men preferred woody, sandalwood, cedar or pink smells enriched with oriental

ingredients, spices, citrus and flowers. Women preferred flower perfumes such as roses, jasmine, magnolia, violet and others. Perfume contained 15 - 30% of fragrance ingredients. It was the most concentrated smell which was produced only by a few renowned brands in a lower volume but a higher intensity that corresponds to price/quality. Both sexes also chose citrus scent consistency with lemon, lime or orange. For the Customer Centre Manager of the analyzed company it was surprising to find out that most respondents did not perceive smell of perfume as a means of inducing a pleasant atmosphere affecting the olfactory perceptions of individuals, they evaluated their opinion without interest and influence on their final decision. More than half of the respondents perceived flowers in corporate spaces, receptions or offices as part of corporate culture, business image and brand of regional market. People who were not interested in placing flowers in interior of office were mostly asthmatics or migraine sufferers because they were allergic to pollen and airborne molds. Therefore, they preferred ionizers or air purifiers to balance ergonomic working factors with respect to internal labor requirements for working environment.

In the theoretical and methodological part of the chapter it was found out that author [40] explains business negotiation as a communication process of communicating, sharing or exchanging information, argumentation, opposition, convincing, presentations and providing feedback that supports development of rhetorical skills with help of training, testing and repetition to achieve better business and personal results. This was most commonly supported by moderated discussion, brainstorming or videotaping method as non-verbal and verbal communication might in many cases represent each other but also contradict each other. During non-verbal communication, individuals are most aware of gestures and mimics of sales representatives/negotiators/dealers. Business negotiators, with regard to ergonomic layout of workplace and size of communicative spaces, often occupy a workplace in office at the desk against another employee. According to prescribed standards, workplace must have minimally 12 m³. Due to limited capacity of leisure time and business area, dealers have insufficient space for business negotiations, expression of movement, application of communication techniques and other inspirational tactics of business transactions during which mimic, fixed view, facial expression, gesticulation but also distance between speakers should be emphasized. Strangers perceive disruption of their intimate space at distance 15-45 centimeters as threatening, unsuitable for business meetings, negotiations with a superior or business negotiator/dealer. They prefer to arrange business meetings in social zone with min. 120 cm - 360 cm from body. Based on personal experience of the author and practical studies of individual distances of zones which are differentiated according to demographic, socio-economic structure of population living in urban agglomerations and villages, the inhabitants of rural areas are used to have more space and larger intimate zone than urban populations that are adapted to narrow spaces e.g. in urban mass facilities or other urban public spaces.

The above-mentioned examined facts are combined in all phases of the communication process and business negotiations. In the first phase of negotiations, the atmosphere of environment and the first impression of a business negotiator are important because each negotiator uses his own style of negotiation, business techniques and tactics to attract customer, gain his trust and convince him about uniqueness and value of product/service. Whole negotiating is based on mutual communication, trust and related models of social and diplomatic behavior which are non-violently applied to the business negotiation process.

During phase of sale, communication and interaction between dealer (negotiator) and customer/client are significantly important. Price for a business contract is increased proportionally to a high-quality product/service. Each customer/client has some concerns, fears

of ignorance or of making a mistake so atmosphere of trust and alliance is very important as it stimulates external conditions, good working and business relationships which persist and, at best, continue to evolve.

Based on professional studies, research reports, statistical survey and own experience of the author of the chapter, who is for a long time interested in issues of communication process and business negotiations, research questions were defined:

Is verbal and non-verbal communication during business negotiations prime factor in success rate of business and sales process?

Process of verbal and non-verbal communication between two or more partner subjects is very important during business and working negotiations with clients. Unfortunately, not all business negotiators/dealers are sufficiently equipped to negotiate at high level and effectively apply business, negotiating and sales tactics and techniques as shy or inappropriately chosen option of verbal and non-verbal expressions reduces value of negotiator's expected outcome. Therefore, it is essential for employees of the analyzed company to control their speech and body movements well and to perceive wishes and requirements of customers/clients which are often not verbally spoken but expected. It can be stated that verbal and non-verbal communication during negotiation is a primary factor in the success rate of business and sales process.

Do customers perceive the appearance and personality of business negotiators/dealers as a key priority during a business negotiation?

Majority of professional and laic public see the first impression of individual as an important factor. Especially those ones, who decide intuitively and perceive business partner visually, are more willing to accept required terms and conditions of business partners. In today's modern, digitized and especially virtual society there are individuals who do not see appearance, personality or smiles of business negotiators/dealers as primary, they do not perceive them as a key advantage of business and sales process of negotiation, they consider these rating criteria as passive. Respondents disagreed on type of social clothing that business negotiators/dealers should wear in work. Nevertheless, the influences of personality, visage and behavior have an impact on assertiveness, creativity, teamwork and participation.

The results of the controlled interviews with the Customer Centre Manager of the selected company based in České Budějovice, Czech Republic in April / May this year highlight following facts:

Demonstration and introduction of a product/service are key arguments which are most frequently communicated during business/customer negotiation. Through own recommendations based on proven experience, applicability in user practice and positive references, the customer/client obtains valuable information that can be more objectively judged and evaluated and customer/client is more easily able to select more appropriate alternative to presented product/service. Personal eye contact, mimics and gesticulation with a business negotiator/dealer is art that supports success rate of business with use of various business and negotiating tactics and techniques, concepts and strategies. A wide range of discounts and benefits can be offered through personal, business or working relationships, such as credit card bonuses and financial and non-financial benefits offered in portfolio of the selected company.

The purpose for using verbal and non-verbal communication in business, working and personal lives of individuals in a socialized society of shared multiculturalism is perceived differently. During non-verbal communication, advantages and benefits of presented products/services are enhanced by a sound record with an authentic, pleasant voice which creates atmosphere suitable for buying. This should be accompanied by loud laughter, nodding and lifting eyebrows, etc. The Customer Centre Manager expressed his opinion that some customers/clients imitate behavioral styles and movements, forms and ways of communication to share the same attributes of non-verbal and verbal expression by so-called mirroring. Signals that influence other people are most often used by older and experienced people who can control and reduce gestures during business, work, and personal meetings. With respect to the above-mentioned facts, an economically mature person (man) was chosen as the Customer Centre Manager according to his skills, knowledge, abilities and experience which he gained by practice in field. He has to be able to manage difficult or extraordinary business, work and personal situations and negotiations with customer/client, to respond to suggestions and factual comments, to reasonably and flexibly argue, to negotiate transparently and to disagree with objections to the presented product/service.

With regard to challenges of digital age and virtual world, competing enterprises in domestic and foreign regional market offer visualization and animation of products/services, simulation and optimization of web design in a digital age-based society with a higher share of applicability, usability, uniqueness and irreplaceability of products/services displayed through interactive televisions, audios and video recordings and advertisements. The analyzed enterprise has not used advantages of these new alternative and innovative possibilities of inspiration yet, although they have been discussed several times during working meetings with management of the company in spring and summer this year but has been postponed. The Customer Centre Manager expressed his attitude: “As the Customer Centre Manager, I would like to appeal for benefits and advantages of innovative ways of attracting and contacting a potential client/customer to increase number of new clients/customers and to maintain credibility and loyalty of existing customers/clients”.

Following question was asked: “With what do you have linked color?”. Respondents answered: Red color - joy, vanity, strawberries, unpleasant, kitchen door, aggression, brilliance, pungency, blood, carnations, luminosity; Grey color - seriousness, balance, moderation, calming color, accessory, shoes, wall, muddy water, house, wildness, nothing; Brown color – calming, seriousness, balance, sculpture, soil, painter, joy, nature, land, tranquility, chocolate; Green color - optimism, tranquility, nature, moderation, spring, cottage, garden, clothing; Yellow color - spring, garishness, vanity, accessories, dandelions, sunflowers, gems, warmth; Black color - peace, seriousness, sadness, funeral, good-bye, celebration, accessories, shoes, hair; White color - universality, indecision, sadness, unnaturalness, popularity, blouses, neutrality, satisfaction, wall, bride, wedding, joyful, purity, doctor, hospital, pigeon; Purple color - autumn, funeral table, uncertainty, nothing, neutrality, rainbow, rainy weather, priestly robe, Easter, church dignitaries, religion; Blue color - calmness, thoughtfulness, water, sky, pleasant color, river, brook, lake, clothes, utility, society, flowers; Pink color – baby, female dress, candy, old age; Orange color – sunny weather, joy, clarity, dandelion, nature, autumn, life, autumn leaves, sun, pleasant, temperament, orange. Colors directly and indirectly affect human psyche depending on age because we are surrounded by them and people of different age integrate into them in terms of experienced memories.

Based on the results of the questionnaire survey, controlled interviews with the Customer Centre Manager and own observation of the author of the chapter, it is stated that the current

situation during negotiations with customer/clients in the Customer Centre of the analyzed company which is located in České Budějovice, Czech Republic is on a very high level. With respect to this finding, I suggest to do appropriate precaution to improve and consolidate the current situation with customers/clients and to support creation of a new business partnership based on trust, loyalty, satisfaction and interest of newly addressed customers/clients who are involved in increasing demand for the product/service.

4.1 IMPROVEMENT OF VERBAL AND NON-VERBAL COMMUNICATION OF CUSTOMER CENTRE'S EMPLOYEES

Thanks to the literature part, I found out that open communication between two and more parties is an essential part of business negotiation but also of the personal life of each individual. It is necessary to articulate well, to use appropriate words and phrases but also to be able to control speech of own body because the ability to communicate has a significant impact on the success rate of negotiation process with partners/employees/customers/clients who are aware of the ways and styles of communication. Unfortunately, everyone does not have rich communication abilities so employees regularly attend training courses to improve their abilities and improvisation skills so that direct and open communication with customers/clients is trained and experienced. One of recommendations to eliminate shyness, to increase confidence of communicator and to support him/her in open communication is to start attending a training module which is aimed at application of communication, presentation and managerial skills to business negotiation through direct, personal contact. Prices of corporate courses, that focused on specific narrow profile topics, range from 3,000 - 5,000 CZK without VAT/participant. These days, a profile education course is not offered in the locality of the analyzed enterprise, the nearest educational institution, Top Vision, which is located in Prague, Czech Republic and offers a wide range of terms according to needs of the client. The course is mainly aimed at speech of body and adoption of techniques of non-verbal communication. Time allocation of the course is set at 4 hours in two working days according to client's choice. Price corresponds to the number of entrants. Due to the limited number of employees in the Customer Centre of the analyzed company, the employees split into two groups and chose two terms. Mainly specialists and assistants from Sales Department and the Customer Centre were chosen to attend the course.

4.2 IMPROVEMENT OF THE INTERNAL ENVIRONMENT OF THE CUSTOMER CENTRE'S BRANCH OFFICE

The first impression when entering the Customer Centre's branch office is one of the most important aspects of customer's/client's decisions about credibility of enterprise. Its environment should always be clean, safe, well-tidy and nice-smelling. The questionnaire survey proved that people like flowers in offices. At the branch office of the analyzed company, flowers are absent. The author of the chapter suggests to purchase flowers of smaller growth and to place them in the entrance areas in front of the Customer Centre. Decoration on walls, with a predominance of green color which stimulates tranquility, health, prestige and a fresh feeling, should be added to get live elements that will intensify moments spent with customers/clients.

Through tastefully selected scent, the olfactory sense can be activated which causes feelings of happiness and higher concentration for customers/clients. By using diffusors, which can be placed on tables, walls, ceilings, shelves or air conditioning units, a pleasant smell of offices can be achieved. Prices of fragrances, which might be placed in air conditioning units, are in a

monetary relation of about 300 CZK/set and can be used approx. for 4 weeks. Fragrances might be purchase via e-shop www.aromag.cz. The first application of fragrance is realized by supplier's service technician who also deals with cleaning and servicing of air-conditioning unit. During following months, scents are changed by maintenance service and service of the analyzed company.

A suitable solution to improve the environment would also be separation of entry zone from the main zone. For capacitive reasons, this branch office cannot be separated, even if it is a reasonable solution according to the author's opinion. If there is more than one customer/client at the same time, a discreet zone is not guaranteed because other customers/clients hear and perceive content of dialogue. A possible alternative to the proposed solution is to remove gifts and promotional items which are located in show-cases and entry area and to reconstruct a new layout including replacement of seats by new ones with modern design and easier handling. Another solution is to relocate the entire Customer Centre branch to other hired spaces that would be larger in size and friendlier to layout.

4.3 CORPORATE UNIFORMS FOR EMPLOYEES

Respondents' opinions on suitability of clothing for business negotiators/dealers differed. They suggested corporate uniforms for employees as an acceptable solution. Business negotiators/dealers will have to comply with dress code created in colors of the employer. The united uniform will help to differentiate from competition, to improve corporate culture and customers/clients will not be distracted by a diverse range of colors, shades, patterns, fashion accessories of randomly selected clothing. Considering fact that a dominant color in the analyzed company is a blue one, the author of the chapter suggests choosing different shades of blue clothing. Men should wear mainly blue trousers, jackets, two long-sleeved blue shirts (in the summer season with a short sleeve), two white shirts and one white shirt with a blue stripe. Women should choose between dark blue trousers, skirts and jackets. Dresses should have a pale blue color; two shirts should have white and a pale blue color. The length of skirt and dress is individual according to height of employee; however, the minimum length is above knees. Women's outerwear should be decorated by embroidered logo of the analyzed enterprise. Color of the font would depend on color of given piece of clothes. On dark blue clothes it is recommended to make a golden, light blue or white-blue sign.

Following Table 1 monitors corporate costs in CZK that were spent on partial pieces of clothes. Men's trousers should be allocated 3 pieces per an employee. Men, unlike women, do not have choice of wider range of clothes so women will get only 1 piece of trousers. The other parts of corporate uniforms for women are dresses and skirts per one piece. An important part of the men's clothing is shirt so the number of 5 pieces per a man is suggested. The other pieces of corporate clothes and their cost in CZK are shown in Table 1 below.

Table 1: Costs of corporate clothes (in CZK), Own creation

| Corporate clothes | Price in CZK/piece | Number of pieces | Total price in CZK |
|---------------------------|--------------------|------------------|--------------------|
| Trousers – Men | 2.400 | 9 | 21.600 |
| Trousers – Women | 2.400 | 4 | 9.600 |
| Dresses | 1.500 | 4 | 6.000 |
| Jacket – Men | 6.500 | 6 | 39.000 |
| Jacket – Women | 4.500 | 4 | 18.000 |
| Shirt – Men | 1.600 | 15 | 24.000 |
| Shirt – Women | 1.600 | 16 | 25.600 |
| Skirts | 1.200 | 4 | 4.800 |
| Total price in CZK | | | 148.600 |

The total price of the company's clothes reached a monetary amount of CZK 148,600. Due to fact that fluctuation of employees and seasonal workers is very low, frequent exchanges of tribal workers are not expected.

Part of corporate uniformity of men is also a tie of dark blue color. For women, I propose to wear trendy fashion scarf with the company logo. The choice of shoes is liberal but both women and men have to choose black shoes. The employer annually contributes 1.000 CZK/employee to buy shoes. For women, shoes with a heel of an ideal size of 5.5 cm are recommended and black shoes are suitable for men.

5. CONCLUSION

Negotiation is a process during which each interested subject has own goal, opinions, tries to find common solution which is acceptable for all participated subjects and leads to double-sided satisfaction. Person, who is professionally interested in negotiating is called negotiator. Good negotiator has to be self-confident and patient, have strong arguments and look at minds of the other partner with an outlook and objective view. He/she has high goals and tries to achieve them, looks for new opportunities but also concessions, continually summarizes key points of a controlled conversation and confirms mutual understanding, leads meetings in a positive spirit with humor and has trust of the other partner because the impact of buying processes on the economic results is direct and well measurable. Business workers are subject to double pressure, on one hand it is pressure of superiors to achieve optimal purchasing conditions, on the other hand they have to face arguments of business negotiators/dealers who are often well-trained experts in interpersonal communication, persuasion and negotiation. The expanding list of premium references, which is a result of long-term and diligent efforts to provide the best counselling and training in the field of business negotiating on the Czech and Slovak markets, guarantees quality, stable partnership, trust and loyalty of client/customer.

The relationship between colors and emotions can be explained by preference of colors and emotions, i.e. the preferred color is associated with a certain emotion and vice versa. Properly chosen colors affect the individual's psyche, they can make environment for business meetings more pleasant. It turned out that the association of colors and emotions is different by age.

Hairstyle should look well and should not give impression that a business negotiator/dealer is enemy of barber or comb. It is important to realize that what we often consider to be original

can be perceived by customer/client in a different way. Women should not wear too visible jewelry. Rather decent and elegant than luxuriant or extravagant jewelry should be selected. Men are not required to be always freshly shaved but three-day beard is not appropriate as it points to neglect of man's hygiene and cleanliness. Some banks, enterprises, insurance companies and authorities are subject to strict clothing regulations which all employees must observe. In some cases, it is required to have precise colors of clothes, in other cases, employees are advised to wear stylish clothes and to be dressed according to the protocol. Basic business clothes for men should consist of a suit that includes trousers and jackets. Classic colors are black, all shades of grey and dark blue. The suit is always worn together with a long sleeve shirt. During day, both colored and patterned shirts can be worn. Currently, tie is no longer part of suit. Laces, moccasins or suede shoes are always worn together with suit which a man can wear even when he has jacket and trousers made from another material. Moccasins are worn without socks. Color of socks has to match with shoes. Overcoat should be in line with clothing, i.e. a sleek coat for a men's suit, a sweatshirt for a sweater. Costume for women is a suitable solution to meet requirement that lady's business clothing always should be layered. Layers begin with underwear; continue with a dress or blouse, jacket, bolero or blazer. The underwear should not be visible, open buttons on blouse should not reveal the bottom layer of clothing. Dresses should have a reasonable length with a decent vent including upper or medium heeled boots. As men have to wear jacket, stockings are prescribed for women. Colors of women's clothes should be chosen conservatively, i.e. black, white, salmon, beige, pale blue, etc. Perfumes should not be heavy as well as makeup which should be less noticeable. Woman should choose decent accessories, i.e. a maximum of one ring, decent watch, discreet earrings and a simple haircut.

Smells affect lives of individuals but each individual can influence his own life. If no one in your immediate neighborhood has recently told you that you smell good, dress appropriately and act comfortably, nice and sympathetically, it's time to make a change, to make the exterior look more attractive, to improve dress code, to adapt to fashion trends, to accept and identify with the rules of social behavior including the rules of ethics.

Success of a soft negotiating strategy consists of creating a friendly atmosphere, sharing a common compromises or eventual concessions according to mutual agreement, supporting trust or threats of confrontation, easily changing position towards promises, etc. Soft negotiating strategy damages the quality of problem solving, leading to a loss. Good relationship is not created! Goodwill is interpreted as a weakness!

A hard-negotiating strategy is based on rivalry, victory, stubbornness, mistrust and confrontation in a way of so-called fortified position, threat and obstinacy in gaining profit which is a condition of success including use of pressure techniques. The hard-negotiating strategy damages mutual relations, encourages one party to win over another.

Barriers to cooperation are negative emotions, prejudice to enterprise, problem, person, situation, group, etc., style of negotiations, distrust of agreement, negotiating power including personal, offensive and irritated reactions. The natural reactions to difficulties during negotiations are accusations, e.g. ("The other party is responsible for everything", "You should be ashamed, ", "Why me, ", "Why it happened to me"), intimidation ("In order to get position in the future...", "If you continue like this, you will see", etc. If you find yourself in a difficult situation, do not think but act because it will often be necessary to behave oppositely than your natural reaction is!

The Czechs prefer type of communication in which they can deepen mutual relationships. They can appreciate sympathy of other people; an important part of interaction is a pleasant atmosphere. The specific features of the Czechs are mainly flexibility, inventiveness and adaptability. They like to improvise in business meetings, they are not limited to one field of activity, and they usually deal with several activities at the same time. Business etiquette is not distinct from European one. Women are usually dressed better than men. Business meeting habits do not show significant differences, they go for business lunches where they can show a sense of humor, and however, it is typical for Czech entrepreneurs that their commitments are slower. The Czech nation is not a nation of patriots, so they often express negatively or critically about the Czech Republic. They prefer personal commitments over general rules to avoid disturbing positive relationships with business partners that have already been created. The intent is not to get into conflict so it is recommended to eliminate or avoid problems. Self-consciousness of the Czechs fluctuates from one extreme to another; they often underestimate or overestimate themselves.

The author of the chapter recommends to have a healthy self-consciousness, to perceive importance of own presentation, professional and communication advantages etc., including weaknesses. Identifying needs of a business partner can be achieved by asking open questions to communicate own opinions, such as "What do you think?", "Why do you think that?" "What would you need?". It is a mistake to assume anything because your prediction may not be correct. Always monitor the partner's benefit, do not offer product parameters but their value. During complex formal negotiations, it is advised to write notes as you will have time to think about further negotiation steps. You should read between lines, keep thinking and promise only what you can accomplish as good and long-term business, working and personal relationships are based on promises which were fulfilled on both sides. If it is possible, you should try to arrange business meetings on your territory because you gain the advantage of home environment where you have things under control and where you are close to all sources of information.

Changing requirements for skills of negotiators, businessmen and dealers are affected by modern trends as range of knowledge and skills that essentially influence sales efficiency, is being transformed. Innovative changes influence modern forms and ways of education designed for corporate business which dynamically develop through meetings, explanations of benefits, discussions, demonstrations of illustrative practice examples, interaction with lecturer/trainer and participants of training where practical experience and training of lecturer/trainer is a necessary knowledge base for expanding and deepening knowledge in the field of education where the art of improvisation and direct response is growing in importance. The most demanded job positions are regional business consultants and representatives for key customers in sales, marketing, media, etc., development specialists, key account managers and other jobs and positions, such as post-marketing manager of progressive sales teams, regardless of recruitment of talents throughout year which, in the context of increasing pressure from dominant global market players, calls for investment in further product development and diversification of value added services that are most often outsourced for potential employer. The better sales team is, the better results are, because need to continuously expand knowledge of business team increases transfer of knowledge especially among new businessmen. It is most often made through individual training during employee's adaptation process as well as through other available forms of meetings, e.g. in thematic workshops, individual training, etc.

Potential for the future, in terms of service quality, is seen in digitization of marketing, e.g. optimizing search engines' websites and advertising campaigns by strengthening mobile

advertising and video, increasing programmatic purchases or special projects by comparing traditional forms of advertising with new innovative features such as native advertising including social network management and on-line communications. These changes bring a challenge to businessmen's thinking within presentations on ad channels and platforms, from printed to marketing ways on social networks, tablets, and mobile apps. For example, banking institutions and insurance enterprises as well as telecommunication and energy enterprises invest in auto insurance through internet sales which has grows by 5% a year. Existing clients/customers, regardless of how they get through distribution channel, automatically get the latest business terms as customer's/client's satisfaction and loyalty is a guarantee of a solid and stable partnership based on fairness. The future of the digital society includes advanced information and communication technologies and business and socially thinking, sophisticated users.

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STRATEGIJSKI MODELI UPRAVLJANJA PERFORMANSAMA PREDUZEĆA

STRATEGIC MODELS OF ENTERPRISES PERFORMANCE MANAGEMENT

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Sadržaj: *Uspešnost realizacije strategije potpomognuta je primenom savremenih koncepata upravljanja troškovima i preduzećem u celini. Razvoj i specifičnosti savremenih modela upravljanja performansama preduzeća praćeni su genezom i usavršavanjem strategijskog upravljačkog računovodstva. S tim u vezi, predmet interesovanja ovog rada su strategijski modeli upravljanja performansama. Cilj rada jeste da predstavi prednosti i slabosti savremenih modela merenja performansi i mogućnost sinergetskog delovanja. Istraživačka pitanja odnose se na integralne modele, koji razvijaju kako kratkoročne, tako i dugoročne pokazatelje kreiranja vrednosti.*

Ključne reči: *Strategijsko upravljačko računovodstvo, upravljanje performansama, strategijski modeli*

Abstract: *The effectiveness of the strategy's implementation has been supported by the application of modern concepts of the cost and enterprise as a whole management. The development and specifics of modern enterprise performance models are followed by genesis and the improvement of strategic management accounting. In this regard, the subject of interest in this paper are strategic performance management models. The aim of the paper is to present the advantages and disadvantages of modern performance measurement models and the possibility of synergistic action. Research issues relate to integral models that develop both short-term and long-term value creation indicators.*

Keywords: *Strategic management accounting, performance management, strategic models*

1. UVOD

U novom proizvodnom i konkurentskom okruženju se mora razviti takav sistem koji jasno povezuje strategijske ciljeve kompanije sa pokazateljima koji se koriste na svim nivoima organizacije. Jedan od sistema upravljanja performansama koji bi se mogao primeniti u okviru strategijskog upravljačkog računovodstva jeste Balanced Scorecard. Ovo inovativno rešenje služi za transformisanje strategijskih ciljeva preduzeća u odgovarajuće pokazatelje performansi. Široka upotreba ovog modela od strane svetskih kompanija nalaže potrebu njegove dublje interpretacije, uz inkorporiranje tzv. strategijske mape. Pored ovog, strategijski pristup upravljanju performansama zahteva upotrebu i drugih modela, poput TQM modela, Prizme performansi, Piramide performansi, Matrice za merenje performansi.

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Ono što je zajedničko svim pomenutim modelima strategijskog upravljanja performansama jeste pokušaj da se merenje poslovnih performansi približi i poveže sa strategijom i dugoročnom orijentacijom preduzeća. Međutim, njihov zajednički nedostatak je neobuhvatanje svih dimenzija poslovanja. Analiziranjem prednosti i slabosti mogu se vršiti poređenja datih modela, pri čemu se, kao rezultat, otvaraju mogućnosti njihovih kombinacija i nastajanja integralnih modela, kao komplementarnih struktura.

Prvi deo rada uključuje relevantnost formulisanja i realizacije konkurentskih strategija u cilju kreiranja i razvoja održive konkurentске prednosti. Uspešnost realizacije strategije potpomognuta je primenom savremenih koncepata upravljanja troškovima i preduzećem u celini. Razvoj i specifičnosti savremenih modela upravljanja performansama preduzeća idu uporedo sa genezom i usavršavanjem strategijskog upravljačkog računovodstva što predstavlja predmet obrade drugog dela rada. Uzimajući u obzir prethodno date činjenice, poluga interesovanja ovog rada jeste isticanje prednosti i slabosti savremenih modela, njihova komparacija i mogućnost sinergetskog delovanja. Cilj rada jeste da na celovit, sažet i razumljiv način predstavi razloge nastanka savremenih modela za merenje performansi, njihove odrednice, relevantne korake u implementaciji i implikacije. Iznošenjem prednosti i nedostataka modela objasniće se osnove formiranja integralnih modela merenja performansi.

2. STRATEGIJSKI PRISTUP UPRAVLJANJU PERFORMANSAMA PREDUZEĆA

Pojavom strategijskog upravljanja preduzećima, koji je u suštini predstavljao odraz povećanog interesovanja za eksternim okruženjem, javila se potreba za razvojem strategijske dimenzije računovodstva. Onog trenutka kada su menadžeri u preduzećima počeli da studioznije prilaze promenama koje se odigravaju u poslovnom okruženju, upravljačke računovođe su bile primorane da fokus interesovanja pomere sa internih aktivnosti na tržište i konkurenciju preduzeća. Takva orijentacija je predstavljala osnovu za razvijanje jednog potpuno novog koncepta informacija pod nazivom strategijsko upravljačko računovodstvo. Strategijsko upravljačko računovodstvo je sastavni deo sistema upravljačkog računovodstva čiji je osnovni zadatak pribavljanje i sjedinjavanje (ne)finansijskih informacija iz eksternog okruženja i onih generisanih u samom preduzeću.

Imperativ savremenih preduzeća je zadržavanje postojećih i osvajanje novih tržišta. Taj imperativ se mora realizovati da bi preduzeća opstala u globalnom, izuzetno turbulentnom okruženju. Sve to implicira potrebu da se u fokusu strategijskog upravljačkog računovodstva nađu glavni elementi strategijskog upravljanja: a) konkurencija, b) kupci i c) vlastiti proizvodi i usluge koji se nude na tržištu.

Strategijsko upravljačko računovodstvo je upravo pozvano da menadžmentu preduzeća obezbedi širok dijapazon informacija o navedenim elementima. Većina tih informacija će biti finansijske prirode tako da one i dalje mogu biti prezentovane u formi tzv. „čvrstih“ računovodstvenih cifara kao što su, na primer, troškovi. Međutim, neke druge informacije koje se odnose, na primer, na nabavku i obim prodaje moraju biti predstavljene u nešto „mekšim“ računovodstvenim ciframa, dok nemali deo preostalih informacija, na primer, raspoloživost, privlačnost proizvoda ili lojalnost kupaca, jednostavno mora biti predstavljen u nefinansijskoj formi. Sve ove grupe informacija su relevantne za uspešno upravljanje savremenim preduzećima, pa zbog toga moraju biti objedinjene u informacionom portfoliju strategijskog upravljačkog računovodstva. To znači da se kroz integrisanje informacija, koje strategijsko upravljačko računovodstvo obezbeđuje iz okruženja i iz samog preduzeća, akumulira

dragoceno znanje koje može pružiti veliki doprinos strategijskom procesu forsiranja održive konkurentske prednosti [1], [2], [3].

Upravljanje preduzećem se u literaturi determiniše kroz tri dimenzije. To su formulisanje strategije, prilagođavanje ili/i kreiranje organizacije i determinisanje sistema mera performansi. Tendencija naučnih krugova uspešno se kreće u smeru pravilnog determinisanja jasnije veze između formulisanja strategije i relevantnog sistema mera performansi.

Nestabilnosti sistema mera performansi znatno doprinosi dinamična priroda faktora i procesa kreiranja vrednosti, odnosno sistema pokretačkih snaga savremenog preduzeća. Tradicionalni sistem pokretačkih snaga preduzeća uglavnom je povezivan sa fizičkom i finansijskom aktivom preduzeća, koja je predmet identifikovanja i merenja računovodstva. Tradicionalne mere performansi predstavljale su i još uvek predstavljaju veoma važno sredstvo u ocenjivanju uspešnosti i kontrole rada preduzeća. Ove mere se odnose na [4]: prodaju i tržišno učešće, prinos na investicije i prinos na imovinu, neto dobitak, prinos po akciji.

Primena ovih tradicionalnih, finansijskih merila performansi u dužem vremenskom roku pokazala je izvesne nedostatke i ograničenja koja se pre svega odnose na neuvažavanje zahteva potrošača, nedostatak strateškog fokusa, nejasnoću veza između strategijskih ciljeva i merila aktivnosti, kao i niz drugih negativnih efekata koji često sugerišu da je operisanje usamljenim finansijskim podacima veoma iscrpljujuće u smislu obrade i korišćenja za preduzeće i njegov top menadžment. Problem tradicionalnih mera koje se baziraju na finansijskim indikatorima je da one ne uzimaju u obzir neopipljivu vrednost sadržanu u znanju koja u velikoj meri može da uveća tržišnu vrednost preduzeća. Takođe, prisutna je prevelika usmerenost na profit kao jedini pokazatelj uspešnosti što top menadžment preduzeća dovodi u položaj neprekidne borbe za povećanje zarade. Tradicionalni (finansijski) modeli merenja, s obzirom da su dominantno okrenuti finansijskoj dimenziji, zapostavljaju nefinansijske dimenzije, kao što je dimenzija potrošača, zaposlenih, poslovnih procesa, društvene odgovornosti i sl. Zbog toga oni ne mogu da daju signale za ostvarivanje svih potrebnih promena u preduzeću. Zbog svoje jednodimenzionalnosti, tradicionalni sistem merenja performansi nije u funkciji strategijskog upravljanja performansama preduzeća u savremenim uslovima poslovanja.

Savremeni poslovni milje nameće potrebu prepoznavanja sistema koji pravi jasnu korelaciju između strategijskih ciljeva kompanije sa pokazateljima prisutnim na svim nivoima organizacije. Neophodno je razviti sistem sa jedinstvenim i konzistentnim karakteristikama koji će definisati sukcesivan trend realizacije strategije. Sistem za merenje i upravljanje performansama mora jasno identifikovati loše periode, neuspehe u sprovođenju strategije i obezbediti metode za njihovo merenje i analizu.

3. INTEGRALNI MODELI MERENJA PERFORMANSI

Ulaganjem napora istraživača osmišljeni su inovativni multidimenzionalni modeli merenja performansi koji danas predstavljaju važan alat upravljanja preduzećem. Hronologija modela merenja performansi, predstavljena u tabeli 1., obezbeđuje nam kratak istorijski razvoj ovih modela.

Tabela 1: Hronologija modela merenja performansi

| Autor/i Model | Opis |
|---|---|
| Epstein and Manzoni (1997) Bourguignon et al., (2004) Pezet, (2009) <i>The Tableau de Bord</i> | Koncept <i>Tableau de Bord</i> u upotrebi je na neki način od kraja 19. veka. Međutim formalizovan je 50-ih godina 20. veka kao sredstvo koje služi korporativnom menadžmentu. Različiti <i>Tableau de Bord</i> nisu ograničeni na finansijske indikatore, nego su razvijeni u kontekstu misije i ciljeva svake jedinice. Ovo uključuje prevođenje vizije i misije jedinica u set ciljeva gde su ključni faktori uspeha identifikovani, zatim transformisani u serije kvantitativnih ključnih indikatora performansi. |
| Keegan et al., (1989) <i>The Performance Measurement Matrix</i> | Matriks merilo kategoriše mere na „troškovne“ ili „netroškovne“ i „interne“ ili „eksterne“. Suština modela je upotreba odgovarajuće metrike kao pristupa i metode „Odredi i Razloži“ („Determine and Decompose“). Ovo uključuje razlaganje departmana na funkcionalne ekvivalente i utvrđivanje kako departmani podržavaju poslovanje. |
| Lynch and Cross, (1991) <i>The Strategic Measurement and Reporting Technique (SMART) Pyramid</i> | Piramida performansi podržava potrebu da se uključe interno i eksterno fokusirane mere performansi i dodaje pojam kaskadnih mera organizacije tako da mere u departmanima i radnim centrima reflektuju korporativnu viziju kao i interne i ekstene poslovne ciljeve. |
| Fitzgerald et al. (1991) <i>The Results and Determinants Framework</i> | Ovaj model klasifikuje mere na dva osnovna tipa: one koje su povezane sa rezultatom (prednosti, finansijske performanse) i one koje se fokusiraju na distorziju ovih rezultata (kvalitet, fleksibilnost, korišćenje resursa i inovacije). Snažan deo rezultata-determinanti okvira je da reflektuje koncept uzroka. |
| Kaplan and Norton, (1992) <i>The Balanced Scorecard</i> | <i>The Balanced Scorecard</i> reflektuje mnoge attribute drugih mernih okvira ali povezuje merenje sa vizijom organizacije. Polazi od toga da nijedan samostalni pokazatelj performansi ne može obuhvatiti punu kompleksnost organizacionih performansi. <i>The Balanced Scorecard</i> prevodi viziju biznisa u ciljeve i mere performansi u četiri perspektive: finansijska, perspektiva potrošača, internih poslovnih procesa i učenje i rast. |
| Brown, (1996) <i>The Input—Process—Output—Outcome Framework</i> | Ovaj makro procesni model kreira vezu između pet faza biznis procesa i mera njihovih performansi. Ove faze su definisane kao inputi, sistem procesa, outputi, izlazi i ciljevi. Model simulira linearni set veza između ovih faza, gde svaki prethodni faktor determiniše naredni. |
| Kaplan and Norton, (1996) <i>The Strategic Balanced Scorecard</i> | Strategijski razvoj <i>balanced scorecard</i> -a nadograđuje se na Kaplanovim i Nortonovim modelom iz 1992. godine ali inkorporira u sebi „lag“ i „lead“ indikatore koji doprinose dvosmernim uzročno-posledičnim lancima. Ovaj proces definiše da je strategija prevedena u set hipoteza uzroka i posledica. <i>The Strategic Balanced Scorecard</i> nije samo |

| | |
|--|---|
| | strategijski sistem merenja već i strategijski sistem kontrole. |
| Neely et al., (2000) Neely et al., (2002) <i>The Performance Prism</i> | Prizma performansi sastoji se od pet integrisanih ravni koje identifikuju područja organizacije: zadovoljstvo stejkholdera, strategije, procesi, mogućnosti i doprinos stejkholdera. Kritički i jedinstven aspekt prizme performansi je reorganizacija recipročnih veza između stejkholdera i organizacije. |

Izvor: [5]

Koncept merenja performansi tradicionalno se zasnivao na finansijskim merilima, ne tangirajući ostale vitalne kompetencije i vrednosti kompanije neophodne u današnjem poslovnom okruženju. Robert Kaplan, profesor računovodstva na Univerzitetu Harvard i konsultant David Norton napravili su značajan pomak u prevazilaženju ograničenja tradicionalnog sistema merenja performansi stavljajući ga u korelaciju sa strategijom. Razvili su sistem pod nazivom *Balanced Scorecard* (BSC) koji je prvi put prezentovan 1992. godine u članku u *Harvard Business Review*, "The Balanced Scorecard - Measures that Drive Performance" [6], [7].

Tokom sledeće četiri godine, veliki broj organizacija je usvojio *Balanced Scorecard* i postigao skoro trenutne rezultate. Kaplan i Norton su otkrili da te organizacije ne koriste *Balanced Scorecard* samo kako bi dopunile finansijske mere pokretačima budućeg učinka, već takođe prenose svoju strategiju kroz mere koje su odabrale za svoj sistem. Kako je Scorecard dobijao na važnosti u organizacijama širom sveta kao ključan alat u sprovođenju strategije, Kaplan i Norton su saželi koncept i učenje u svojoj knjizi 1996., *The Balanced Scorecard*. Od tog vremena, preko polovina svih organizacija sa popisa Fortune 1000 usvojila je *Balanced Scorecard*. Delotvorno se može izvršiti implementacija ovog koncepta u profitnom i neprofitnom sektoru. *Balanced Scorecard* je toliko prihvaćen i delotvoran da ga je *Harvard Business Review* svrstao kao jednu od 75 najuticajnijih ideja dvadesetog veka [8].

Model *Dimenzije uspešnosti* razvili su autori Shenar i Dvir. Ovaj model polazi od sličnih pretpostavki kao i model *Balanced Scorecard* – da postoji više aspekata (perspektiva, dimenzija) uspešnosti i da bez merenja nema upravljanja. Model *Dimenzije uspešnosti* je višedimenzionalni koncept koji uspešnost preduzeća definiše na tri organizaciona nivoa (nivo projekta, poslovne jedinice i preduzeća kao celine) i u četiri vremenska horizonta (veoma kratki, kratki, dugi i veoma dugi). Prema autorima modela, upotreba samo jedne vremenske dimenzije može dati pogrešne signale i navesti na donošenje neispravnih odluka. Tako na primer, kratkoročni pokazatelji finansijskog uspeha preduzeća u celini (prodaja, profit, gotovina) mere se u određenom vremenskom trenutku i menjaju se tokom vremena. S druge strane, što je još važnije, ovi pokazatelji se ne mogu koristiti za ocenu dugoročne perspektive razvoja preduzeća. Nedostatak jasne vizije i sistema vrednosti, tehnološke strategije, investiranja u razvoj kadrova i investiranje u nove poslovne poduhvate, koji su svi važni za dugoročni rast i razvoj preduzeća, ne mogu se sagledati iz kratkoročne perspektive. Njima se mora pristupiti sa stanovišta dugoročnog vremenskog horizonta. Pod veoma dugim vremenskim horizontom autori podrazumevaju vreme u kome je da se „definišu nove potrebe“ pre konkurenata i potrošača, kao ključni pokazatelji uspešnosti preduzeća [9], [10], [11].

Relevantnost ovog modela leži upravo u korpusu ideja koje izlaže i kao takav predstavlja dobru dopunu BSC-u. Model *Dimenzije uspešnosti* u svojoj konstrukciji obraća pažnju na stejkholdere (dobavljači, društvena zajednica) za razliku od BSC-a. Model *Dimenzije uspešnosti* uključuje

analizu podataka u veoma dugom vremenskom horizontu, što mu daje obeležje proaktivnog modela (definišu se „nove potrebe“ potrošača pre ostalih na tržištu). Kao takav, predstavlja idealnu dopunu Balanced Scorecard modela.

Integrisanjem modela *Balanced Scorecard* i modela *Dimenzije uspešnosti* nastao je *Dinamički multidimenzionalni model* (Dynamic Multi-Dimensional Performance Framework - DMP). Težnja je bila da se njihovim kombinovanjem otklone ključni nedostaci. Naime, prema autorima DMP ključni nedostatak BSC jeste nedovoljna naglašenost dimenzije ljudskih resursa i nekih drugih bitnih stejkholdera preduzeća (dobavljača, šire društvene zajednice) [12]. Takođe, model BSC ne daje jasne predloge pokazatelja vezanih za veoma dugu vremensku dimenziju uspešnosti preduzeća. Nedostatak modela *Dimenzije uspešnosti* se ogleda u nekompatibilnosti definisanih pokazatelja po pojedinim vremenskim dimenzijama. Vremenska analiza za veoma kratke, kratke, duge i veoma dugoročne periode dovodi do dispariteta sa računovodstvenim izveštajnim periodima. Korišćenjem jakih strana ova dva modela kreiran je model DMP. Ovaj model posmatra ukupnu uspešnost preduzeća sa stanovišta pet dimenzija uspešnosti - finansijska dimenzija, dimenzija potrošača (tržišta), dimenzija procesa, kadrova i budućeg rasta i razvoja. To je višedimenzionalni model, koji koristi dinamički koncept u proučavanju uspešnosti preduzeća. Model DMP proučava ukupnu uspešnost preduzeća sa stanovišta: pet ključnih dimenzija uspešnosti, određenog broja vremenskih dimenzija i sa stanovišta brojnih stejkholdera preduzeća. Na osnovu istraživanja, autori su identifikovali dvanaest ključnih osnovnih pokazatelja, raspoređenih u okviru navedenih pet dimenzija uspešnosti, koji su od značaja za sve tipove preduzeća. Ovaj model je specifičan po tome što predlaže da različita preduzeća ne treba da koriste isti set pokazatelja, niti da podjednak značaj pridaju različitim, ponuđenim dimenzijama u okviru modela. U skladu sa svojom delatnošću, tehnologijom, strategijom, veličinom i tipom okruženja, preduzeća treba da koriste neke od ponuđenih dimenzija, pridajući im odgovarajući značaj. Takođe, preduzeća treba da ponuđenih dvanaest ključnih pokazatelja iskoriste kao osnovu za dublju analizu i identifikovanje seta pokazatelja koji će najbolje odgovarati specifičnostima preduzeća i potrebama ocene uspeha preduzeća.

4. ZAKLJUČAK

Strategijsko upravljačko računovodstvo polako postaje osovina koja definiše glavne strategijske pakete u kompletiranju nastupa preduzeća u poslovnom okruženju. Jedna od njegovih glavnih tendencija jeste pronalaženje zaokruženog sistema merila performansi za podršku odabranoj strategiji. Napori se sve više usmeravaju ka kreiranju sistema merila performansi adaptivne prirode u odnosu na okruženje i u odnosu na potrebe preduzeća. Strategije se prevode u merljive veličine finansijskog i nefinansijskog karaktera u skladu sa vitalnim poljima poslovanja preduzeća. Objedinjavanjem i uravnoteženjem finansijskih i nefinansijskih mera performansi osvetljavaju se ključne promene koje se sprovode u preduzeću. Savremeni koncepti afirmišu multidimenzionalni pristup merenju performansi uvažavanjem interesa različitih stejkholdera. Zajedničko svim ovim modelima jeste nemogućnost obuhvatanja svih dimenzija poslovanja, pa kao rezultat toga nastaje određeno sažimanje i formiranje komplementarnih modela.

Balanced Scorecard kao strategijski sistem upravljanja performansama, nalazi snažno uporište u praktičnoj primeni dajući odlične rezultate. Razvijajući kompletnu procesnu garnituru preduzeća u četiri perspektive (finansijska perspektiva, perspektiva potrošača, perspektiva internih poslovnih procesa i perspektiva učenja i razvoja), kreira jasnu vezu između ključnih mera performansi u okviru svake perspektive i strategijskih ciljeva. Uz uvažavanje ostalih

modela, smatramo da Balanced Scorecard poseduje punu sistematičnost u razgradnji infrastrukture internog lanca vrednosti jednog preduzeća.

Dimenzije uspešnosti, kao višedimenzionalni koncept, uspešnost preduzeća definiše na tri organizaciona nivoa (nivo projekta, poslovne jedinice i preduzeća kao celine) i u četiri vremenska horizonta (veoma kratki, kratki, dugi i veoma dugi). Visoka vremenska naglašenost u analitici ovog sistema predstavlja medalju sa dve strane. Na jednoj strani visoka vremenska kontrola podataka prouzrokuje ažurne povratne informacije, dok na drugoj strani dolazi do vremenskog dispariteta sa računovodstvenim izveštajnim periodima. Ovo može dovesti do dezorijentisanosti u pojedinim vremenskim periodima.

Na osnovu jakih i slabih svojstava pojedinih modela, otvara se teorijski i praktični prostor za njihovu kombinaciju. *Dinamički Multidimenzionalni Model za Merenje Performansi* je nastao kao „legura“ modela *Balanced Scorecard* i modela *Dimenzije uspešnosti*. Uvažavajući specifikum svakog preduzeća, model DMP formira različite okvire pokazatelja za različita preduzeća. Duboka interpretacija kratkoročnih i dugoročnih performansi, čini ovaj model jednim od najsveobuhvatnijih sistema za merenje performansi.

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OSNOVNI KONCEPT INOVACIONE STRATEGIJE

BASIC CONCEPT OF INNOVATION STRATEGIES

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Apstrakt: *Definisanje strategije inovativnosti predstavlja jedan od ključnih elemenata upravljanja dinamikom tehnoloških inovacija u preduzeću. Strategija za inovacije ima svoju osnovu u globalnoj poslovnoj strategiji, gde ima ulogu posrednika između organizacije i okruženja. Da bi kompanija pravilno definisala i realizovala inovacionu strategiju, ali i uspešno upravljala inovacionim portfoliom, potrebno je da se na nivou kompanije definišu načini upravljanja i razmene znanja, lanci komunikacije i odgovornosti, redovno izdvajaju sredstva za istraživačke i razvojne projekte.*

Ključne reči: *strategija, inovacija, menadžment, okruženje*

Abstract: *Defining the innovation strategy is one of the key elements of managing the dynamics of technological innovations in the company. The Innovation Strategy has its basis in the global business strategy, where it plays the role of an intermediary between the organization and the environment. In order for a company to properly define and implement an innovation strategy, but also successfully manage an innovative portfolio, it is necessary to define methods of management and knowledge management, communication chains and responsibilities at the company level, regularly allocate funds for research and development projects.*

Keywords: *strategy, innovation, management, environment*

UVOD

Inovacije treba da pomeraju granice i njihova implementacija, valorizovana od strane tržišta, uglavnom obezbeđuje povoljniju konkurentsku poziciju u “tržišnoj utakmici”. Kada razmišljamo o inovacijama, nemoguće je ne razmišljati o Apple-u. Apple je stvorio i nastavlja da stvara jedinstvene proizvode sa velikim uspehom. iPhone, iPad i Watch sve su to inovativni proizvodi. Iako manje kompanije možda nemaju Appleov globalni uspeh, neobičnost inovacija je u tome što nikada ne znate šta se može desiti sa proizvodom i uspehom koji vam inovacije mogu doneti.

Strategija inovacija je od suštinskog značaja za kompanije koje žele da steknu konkurentsku prednost. Efikasna strategija inovacija treba da bude inspirativna i kreativna stvarajući nešto jedinstveno za proizvod ili uslugu koju razvija. Kao kompanija, uvek težite da povećate vrednost trenutnog proizvoda ili da kreirate nešto novo što će potrošače opredeliti za izbor vašeg proizvoda ili usluge. Strategija je definisanje osnovnih dugoročnih determinanti, ciljeva

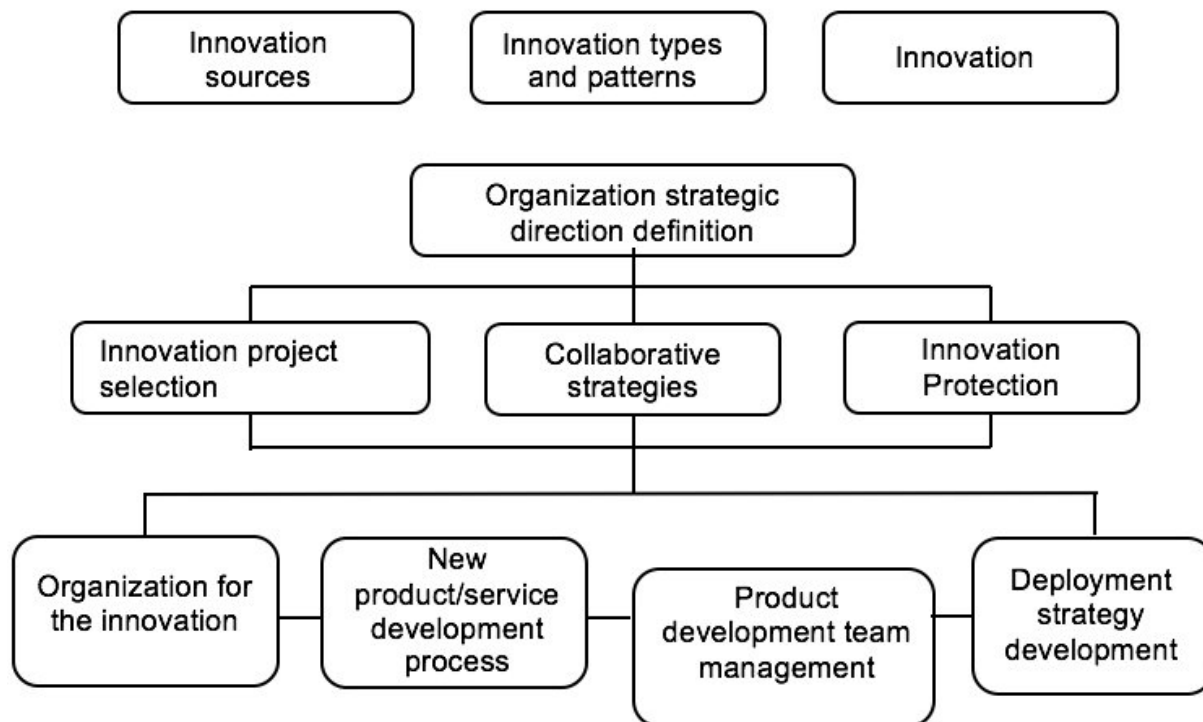
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i zadataka preduzeća, te usvajanje pravaca akcije i alokacije resursa neophodnih da se realizuju ti ciljevi. [1] Strategija je, prema tome, plan igre za ostvarivanje ciljeva.

Inovaciona strategija preduzeća „odnosi se na donošenje strateških odluka iz oblasti razvoja novih proizvoda, usluga, procesa, kojima se usklađuju sposobnosti preduzeća i mogućnosti koje postoje u okruženju, radi ostvarivanja dugoročnih poslovnih ciljeva. [2]

Slika 1. Inovaciona strategija



Izvor : J. W. Zartha : Technological Surveillance for the Identification of Innovations in Leather tanning byproducts, 2018.

Definicija strateškog pravca organizacije obuhvata tri segmenta:

- a) selekciju inovativnih projekata
- b) strategije saradnje i
- c) zaštita inovacije.

Kao što je prikazano na slici 1. strategije saradnje sadrže: inovaciju organizacije, proces razvoja novog proizvoda ili usluge, menadžerski tim za razvoj proizvoda i strateški razvoj.

Osnova za donošenje inovacione strategije je poslovna strategija kompanije i ona ima ulogu posrednika između preduzeća i okruženja u oblasti inovativnosti. Međutim, inovaciona strategija se mora konstantno usklađivati sa tehnološkom, marketing, proizvodnom i drugim funkcionalnim strategijama. Inovaciona strategija se bazira na poslovnom modelu i na tehnologiji preduzeća. Američki profesor Nick Donofrio ističe: „Mi definišemo inovaciju kao svoju sposobnost da kreiramo novu vrednost u preseku poslovanja i tehnologije... ne možemo se osloniti samo na invenciju ili tehnologiju za uspeh. [3]“ Prema tome, uspešna preduzeća u cilju uspešne realizacije inovacija, kombinuju tehnološku promenu sa promenom poslovnog modela.

Postoje tri ključne oblasti u kojima se inovaciona strategija vezuje za promenu poslovnog modela [2] - [1]:

1. **Planirana vrednost** – šta se prodaje i isporučuje tržištu;
2. **Lanac snabdevanja** – kako se kreira i isporučuje tržištu (relacije sa snabdevačima i kupcima, koji mogu biti i izvori ideja);
3. **Ciljni kupci** – kome se isporučuje (uloga marketinga i izbora ciljnog tržišta).

Drugim rečima, najbolje rezultate ostvaruju kompanije u okviru zrelih privrednih grana koje su angažovane na marketinškim ili administrativnim inovacijama a ne kompanije orijentisane na visoku ili novu tehnologiju, koje su glavna tema u razvojnoj strategiji. Međutim, uprkos takvoj konstataciji, usko shvatanje inovacije orijentisano na tehnologiju dominira akademskom i javnom raspravom. Najbolji primer su panevropske ankete o inovaciji (Community Innovation Surveys – CIS) koje su donedavno bile isključivo usmerene na inovaciju proizvoda i procesa i na značajne promene u tehnologiji na kojima se te inovacije zasnivaju.[4]

Naravno da takav pristup nije dovoljno dobar i da će omogućiti samo delimično razumevanje inovacija i inovatora – posebno velikim ograncima sektora malih preduzeća. Možda najviše zabrinjava to što taj pristup gotovo neizbežno navodi na zaključak da uslužne kompanije nisu inovativne. Međutim danas smo svedoci kroz različite primere da postoje značajne inovacije u uslužnom sektoru (naročito organizacione inovacije) i da je usko shvatanje orijentisano na tehnologiju već prevaziđeno. [5]

FAKTORI KOJI UTIČU NA IZBOR INOVACIONE STRATEGIJE

Osnovni elementi strategije preduzeća su: tržište (sastoji se od kupaca, konkurencije i tehnologije, ugrađenih u socijalno, političko, ekonomsko, demografsko i naučno okruženje, čije sile su pokretači promena), stejkholderi, sposobnost preduzeća, kapaciteti preduzeća. Sposobnosti i kapaciteti preduzeća su definisani projektima, resursima i kulturom preduzeća. Inovaciona strategija kao jedna od mogućih strategija razvoja preduzeća zavisi od određenih faktora koji na nju utiču [3] - [1] :

- **Interni**
 - a) tehničke mogućnosti,
 - b) organizacione sposobnosti,
 - c) uspeh tekućeg poslovnog modela,
 - d) finansiranje,
 - e) vizija top menadžmenta,
- **Eksterni**
 - a) mogućnosti eksterne mreže,
 - b) struktura poslovnog područja,
 - c) konkurencija,
 - d) stopa tehnoloških promena

Slika 2. Inovaciona matrica

| | | | |
|-------------|--------------------------|--------------------------|----------------|
| Tehnologija | <i>novo</i> | Polu-radikalne | Radikalne |
| | <i>Blisko postojećem</i> | Inkrementalne | Polu-radikalne |
| | | <i>Blisko postojećem</i> | <i>Novo</i> |
| | | Posloni model | |

Prilikom utvrđivanja inovacione strategije, preduzeće bira segment u gore prikazanoj inovacionoj matrici u koji će usmeriti većinu opredeljenih sredstava za inovacione projekte. Zavisno od pozicije investicija u matrici, moguća su dva tipa inovacionih strategija [3] - [2] :

- „Igrati-da-pobediš” (PTV tj. Playing- to-Win);
- „Igrati-da-ne-izgubiš” (PNTL tj. Playing-Not-to-Lose).

Strategija „**Igrati-da-pobediš**” je strategija inovacionog lidera koja se, pretežno, oslanja na polu-radikalne inovacije - organizacija investira u promene tehnologije i poslovnog modela sa ciljem da bude ispred konkurenata na osnovu radikalne inovacije; alternativno, do leaderske pozicije se dolazi na osnovu ponavljanja različitih tipova inovacija: inkrementalnih, polu-radikalnih i radikalnih. Ovaj tip strategije je tipičan za preduzeća visoke tehnologije koja prvi put počinju sa radom. Za ove kompanije je rizik najveća opasnost, tako da one ostvaruju ili veliki uspeh ili velik neuspeh. Karakterističan primer za ovaj tip strategije je kompanija Amazon.com, koja je inovacijom procesa napravila fantastičan uspeh u e-prodaji knjiga.

Strategija „**Igrati-da-ne-izgubiš**“ je strategija za koju se preduzeća odlučuju u slučajevima kada je konkurentsko okruženje veoma neizvesno ili postoje visoka interna ograničenja. Ova strategija se oslanja na više inkrementalnih inovacija i ima za cilj da se kompanija održi u postojećem okruženju, napredujući postepeno uz mali rizik. Tipičan primer za PNTL strategiju je velika kompanija Johnson&Johnson koja se oslanja na sniženje troškova i akvizicije.

Poznati teoretičari strategijskog menadžmenta Urban i Hauser prave razliku između inovacione strategije lidera (proaktivne strategije) i strategije sledbenika (reaktivne strategije): [6]

- **Proaktivna strategija (strategija lidera)** - Preduzeće koje se opredeli za proaktivnu strategiju je inovacioni lider i bavi se predviđanjem i anticipiranjem promena u okruženju, kako bi ih iskoristilo za svoje pozicioniranje na tržištu. Proaktivna strategija obuhvata:
 - a) **Strategiju baziranu na R&D** – preduzeća se opredeljuju za inovacije koje su rezultat istraživačko-razvojnog rada, što zahteva veliki broj angažovanih kadrova i velika finansijska sredstva, kao i visok rizik; preduzeća prave svojom inovacijom prve prodore na tržištu (primer: Teflon – Dipon, Instant fotografija – Polaroid);
 - b) **Preduzetničku strategiju** - preduzeća imaju inovacione aktivnosti sa visokim rizikom, uz korišćenje uočenih prilika, koje nemaju uvek za rezultat veliki tehnološki napredak; ovu strategiju često karakteriše ideja

čiji je nosilac jedna ličnost (preduzetnik) ili manja grupa ljudi koji se angažuju na realizaciji ideje (primer: Kalašnjikov, Head, Sem Volton, Starbucks, Microsoft, Apple);

- c) **Strategiju nabavke (akvizicionu strategiju)** – inovaciona strategija u kojoj preduzeće ostvaruje inovaciju kupovinom (akvizicijom) druge kompanije u cilju obezbeđenja novog proizvoda, tj. inovacija se obezbeđuje akvizicijom preduzeća koje je prethodno sopstvenim razvojem proizvelo novi proizvod - difuzija, horizontalni transfer (primer: kupovina Compaq-a od strane HP);
 - d) **Strategiju baziranu na marketingu** – preduzeće ostvaruje inovacije na osnovu inicijative marketing funkcije i najčešće to znači konkurentnu, agresivnu inovaciju proizvoda (primer: Sigurnosno staklo - 3M, Registracija internet domena – GoDaddy).
- **Za reaktivnu strategiju (strategiju sledbenika)** se opredeljuju preduzeća koja prihvataju ulogu inovacionog sledbenika, tj. odgovaraju na zahteve i potrebe kupaca i aktivnosti konkurencije. Ova strategija obuhvata:
 - a) **Reponzivnu strategiju** – preduzeće direktno reaguje na zahteve kupaca za inovacijom;
 - b) **Imitativnu strategiju** – preduzeće nema sopstvenih istraživanja, ostvaruje inovaciju tako što nakon uvođenja novog proizvoda od konkurencije nastoji da ga imitira, licencirana proizvodnja, niska cena proizvodnje, usmerenost na lokalna tržišta;
 - c) **Drugi bolji** – preduzeće ostvaruje inovaciju tako što nakon uvođenja novog proizvoda od strane konkurencije, nastoji da proizvod modifikuje i unapredi;
 - d) **Defanzivnu strategiju** – preduzeće razvija inovaciju tako što nakon inovacije proizvoda od strane konkurencije vrši modifikaciju i usavršavanje svog postojećeg proizvoda i na taj način nastoji da spreči negativan uticaj uvođenja novog proizvoda konkurencije na tržište.

Inovativne strategije, nakon što su dobro osmišljene i planirane, moraju se adekvatno implementirati u samu organizaciju, odnosno kada im se dodeli mesto u upravljanju poslovanjem i razvoju organizacije. Implementacija inovativnih strategija je odluka top menadžmenta, i uglavnom se vrši putem već nekog ustaljenog i sertifikovanog sistema kvaliteta, kao što je npr. TQM - Total Quality Management, odnosno sistem upravljanja celokupnim kvalitetom.

Kompanija mora da prilikom odabira inovacione strategije uzme u obzir različite faktore koji imaju opredeljujući uticaj na definisanje ciljeva, misije i vizije tj. elemenata koji su temelj svake strategije. Najuspešnije kompanije dosledno pristupaju sledećim elementima efikasne strategije inoviranja kao idealni tok ili proces razmišljanja kako bi top menadžment rukovodeće timove usmerio prema realizaciji inovacione strategije:

- **ciljevi i uloga** - navedite ciljeve razvoja novih proizvoda i ulogu inovativnih proizvoda koje će pomoći u ostvarivanju poslovnih ciljeva kompanije.
- **tržište i strateški potezi** - fokusiranje je ključ za efikasnu strategiju inovacija. Navedite gde ćete napadati konkurenciju. Koncept strateških tržišnih niša je u srcu strategije inovacija - tržišta, industrijski sektori, aplikacije, tipovi proizvoda ili tehnologije su oblasti u kojima će preduzeće usredsrediti svoje napore.

- **Strategija pristupa tržištu** - Kako planirate napadati svaku stratešku nišu ? Možete odabrati da budete agresivni i da budete industrijski inovator (prvi na tržištu); ili brzi pratilac, čekajući i gledajući, i brzim kopiranjem i poboljšavanjem sopstvenog proizvoda u odnosu na konkurente. Druge strategije se fokusiraju na niske troškove i na diferencijaciju. Globalna dimenzija je takođe deo plana napada: da li usvojiti globalni, lokalni ili regionalni strateški pristup razvoju proizvoda.
- **Raspoređivanje - sredstava, prioriteta i strateške odluke** - Veoma je važno koliko trošimo na razvoj novog proizvoda i naglasak koji stavljamo na svaku stratešku odluku. To prirodno dovodi do sledećeg koraka, a to je odluka o visini resursa za svaku tržišnu nišu. Dodeljivanje resursa pomaže da se osigura razvoj novog proizvoda strateški usklađen sa ukupnim poslovnim ciljevima kompanije.
- **Vremenski okvir** – Ponekad je od presudnog značaja vreme za implementaciju inovacije odnosno uvođenje novog proizvoda ili usluge. Svako kašnjenje sa uvođenjem novog proizvoda ili preuranjenim uvođenjem novog proizvoda može prouzrokovati izostanak pozitivnih efekata inovacije.

ZAKLJUČAK

Inovativna strategija kao odlika savremene organizacije koja je u svoje poslovanje implementirala inovativan pristup, može biti usmerena na kupca, konkurenciju, tehnologiju, ka stakeholderima, projektima i resursima i organizacionoj kulturi. Neophodno je sve ove oblasti integrisati u jednu celinu da bi se ostvarila konkurentna prednost na tržištu, odnosno potrebno je uvesti inovacije u sve segmente poslovanja. Šanse i pretnje se na tržištu, kao i želje stakeholdera menjaju i rastu progresivno. Zbog toga je neophodno implementirati miks strategija, koje su podložne promenama i prigrđavanju novonastalim tržišnim uslovima. Prema tome, inovativna strategija u savremenoj organizaciji mora biti izbalansirana i dinamična.

Jedno od centralnih pitanja menadžmenta inovacija odnosi se na donošenje strateških odluka iz oblasti razvoja novih proizvoda, usluga, procesa, kojima se usklađuju sposobnosti organizacije i mogućnosti koje postoje u okruženju, radi ostvarivanja dugoročnih poslovnih ciljeva. Definisane inovacione strategije je ključni element uspešnog menadžmenta inovacija u organizaciji. Inovaciona strategija ima svoju osnovu u poslovnoj strategiji, tj. mora biti podrška poslovne strategije, gde ima ulogu posrednika između organizacije i okruženja kada je u pitanju inovativnost. Organizacije su stalno u situaciji da donose strateške odluke u okviru inovacionog portfolija, pre svega u smislu definisanja prioriteta inovacionih projekata, te uspostavljanja inovacionih kompetentnosti. Stoga se inovaciona strategija mora usklađivati i sa tehnološkom, marketing, proizvodnom i drugim funkcionalnim strategijama, kao i sa strategijom intelektualne svojine. Inovaciona strategija je često ključni korak za ulazak nove organizacije na postojeće tržište. Isto tako, postojeće organizacije koriste inovacionu strategiju kao prednost, ukoliko imaju sposobnost da tu prednost prepoznaju.

Karakteristike uspešnih inovativnih strategija možemo svesti na usmerenost ka dugoročnim ciljevima, razumevanje spoljašnjeg okruženja, dobro poznavanje sopstvenih organizacionih sposobnosti, kao i koordinaciju i efektivnu integraciju poslovnih aktivnosti. Jako je bitna i organizaciona klima i kultura, odnosno motivacija, podsticaj, obuka i usavršavanje zaposlenih na svim nivoima, radi uspešnog sprovođenja inovativne strategije.

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DIMENZIJE ORGANIZACIJE I NJIHOV UTJECAJ NA ORGANIZACIJSKU STRUKTURU

ORGANIZATIONAL DIMENSIONS AND THEIR IMPACT ON THE ORGANIZATIONAL STRUCTURE

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Sadržaj: *U vremenu sve turbulentnijih promjena u poslovanju i sve složenije strukture navedenoga organizacijske strukture poduzeća više nisu „kruti” elementi koji se ne mijenjaju i nisu podložni promjenama, negoli se konstantno moraju prilagođavati složenom tržištu, bilo ono lokalno, regionalno, ili međunarodno. U skladu sa navedenim organizacija se mora konstantno prilagođavati u svim svojim elementima i osobitostima kako bi se njome uspješno upravljalo. Dimenzije organiziranja ovdje imaju ključnu ulogu u svrhu stvaranja adaptibilnih, tzv. organskih struktura koje se lakše prilagođavaju unutar sebe i na taj način prema samome okruženju i postaju proaktivne u poslovnom razmišljanju. U ovome radu će se prikazati utjecaj dimenzija organizacije na njezine strukture kroz teorijski prikaz elemenata organizacijske strukture kao i važnije organizacijske strukture i kako navedeno utječe u praksi na uspješno poslovno rukovođenje. U radu će se koristiti deskriptivna metoda, metoda analize, sinteze, indukcije i dedukcije. Na kraju rada dati će se preporuke vezano uz suvremene organizacijske trendove pomoću kojih se lakše posluje u sve konkurentnijem poslovnom okruženju.*

Ključne reči: *Dimenzije organizacije, elementi organizacijske strukture, organizacijska struktura, rukovođenje, suvremeni organizacijski trendovi.*

Abstract: *In the era of increasingly turbulent changes in business and more complex organizational structure of enterprises, enterprises are no longer “rigid” elements that are not changing and that are not subjects of changes, but must constantly adapt to a complex marketplace, whether local, regional or global. In accordance with mentioned, organization must constantly adapt in all of its elements and features for successful management. Here, organizational dimensions play a key role in creating adaptable, so – called organic structures that are more easily adapting within themselves, and thus to the environment, to be more proactive in business thinking. This paper will show the impact of the organization’s dimensions on its structure through theoretical view of the elements of organizational structure, as well as important organizational structures and how it is influenced in practice for success business management. The paper will use descriptive method, method of analysis, synthesis, induction and deduction. At the end of the paper, recommendations will be given regarding contemporary organizational trends that will make it easier to operate in more competitive business environment.*

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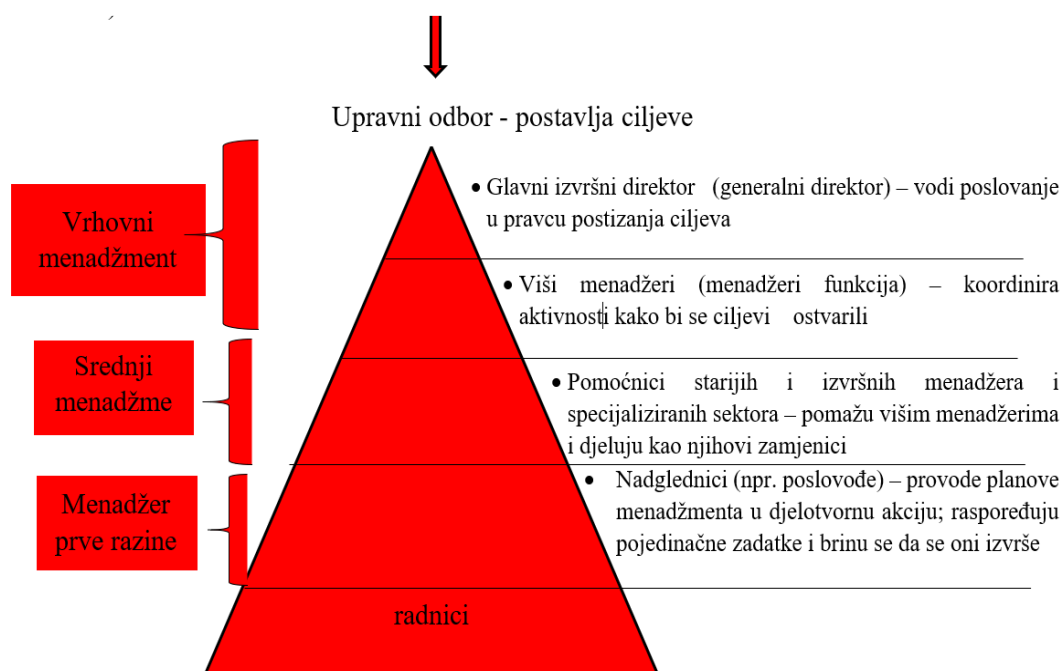
⁸⁵ Veleučilište u Rijeci, Vukovarska 57, Rijeka, Hrvatska

Keywords: *Organizational dimensions, elements of organizational structure, organizational structure, leadership, contemporary organizational trends.*

1. KLASIČNE TEORIJE ORGANIZACIJE I NJEZINE TEMELJNE ODREDNICE

Klasične teorije organizacije u osnovi bi se mogle podijeliti na dva osnovna pristupa, organski koji danas uvriježen, te mehanicistički koji je bio aktualan u vrijeme dok je svjetska proizvodnja bila gotovo jednaka potražnji, i kad je se cijena dobara i usluga primarno kreirala dogovorno između dviju navedenih strana u skladu sa pregovaračkom moći subjekata na tržištu, u vremenskom periodu od početka industrijske revolucije do otprilike 1930.g. prošloga stoljeća u vrijeme masovne proizvodnje. Mehanicistički, tvrdi, rigidni pristup prema organizaciji je u tom smislu bio stabilan, sa dubokom podjelom rada i specijaliziranošću radnih mjesta i radnika. Struktura rukovođenja je bila klasično autokratska sa dosta visokom razinom vertikalne diferencijacije, organizacije formalizirane i nefleksibilne, što poradi same strukture poslova i poslovanja, što poradi nepostojanja potreba za stvaranjem fleksibilnih organizacijskih struktura jer sama poduzeća to nisu niti zahtijevala jer se nisu morale konstantno prilagođavati potrebama tržišta uslijed toga što je proizvodnja bila izvedena iz same potražnje, što se može vidjeti na slijedećem prikazu.

Slika 1. Organizacijska piramida



Izvor: izrada autora prema Sikavica, Bahtijarević – Šiber, Pološki Vokić, (2008), *Temelji menadžmenta*, Školska knjiga, Zagreb, str.39.

Nadalje, razvojem ostalih poslovnih orijentacija poput prodajne (proizvođač – prodaja – tržište gdje povećan broj proizvođača i potreba, ukazuje na potrebu uvođenja funkcije prodaje u poduzeće), marketinške (uvođenje koncepta 4P jer se shvaća kako je potrošač u središtu interesa), te orijentacije na kvalitetu (složenost i preciznost proizvoda, prijatna zdravlju, ljudima i okolini, državna regulacija kvalitete, pokreti za zaštitu potrošača, razvoj znanosti, tehnologije i znanstvenoistraživačkog rada), razvojem samog rada i ljudske djelatnosti, osobito

nakon 2. svjetskog rata kad se ponovno trebalo prebaciti na mirnodopski način proizvodnje, te oko 1970 – ih godina prošlog stoljeća kad je kvaliteta prilično evoluirala temeljena osobito na japanskom proizvodnom konceptu, došlo je do shvaćanja kako se izraženu konkurenciju može popratiti samo neprijepornim svakodnevnim naporima u svim fazama poslovnih procesa temeljeno na permanentnom obrazovanju. U tomu smislu razvio se sasvim jedan novi koncept, koncept TQM – a (*Total Quality Management*) koji predstavlja način upravljanja organizacijom usredotočen na kvalitetu, utemeljen na sudjelovanju svih članova organizacije koji zadovoljavanjem želja kupaca teže dugoročnom uspjehu organizacije, temeljem sustavnog pristupa menadžmentu čiji je cilj kontinuirano povećanje vrijednosti za kupca oblikovanjem i unapređivanjem organizacijskih sustava i procesa, integrirano i konzistentno. [1] Kako bi koncept bio što kvalitetnije proveden on se danas u svim svojim aktivnostima prenosi i u interorganizacijsku mrežu poduzeća.

U suprotnosti sa mehanicističkom teorijom organizacije, javlja se organski pristup koji je temeljen na prirodnim znanostima, posebice biologiji i fizici koji organizaciju promatra kao biološku jedinku i potkrepljuje organizacijski darvinizam koji opstanak vrsta na Zemlji uspoređuje sa opstankom društvenih organizacija. Darwin govori kako opstanak organizacije ovisi o sposobnosti prilagodbe i provođenja promjena i uspoređuje navedeno sa prilagodbom životinjskih i biljnih vrsta na Zemlji. Nadalje u sklopu navednoga se govori o nestanku određenih biljnih i životinjskih vrsta na Zemlji na način da neke nestaju, a neke se stapaju sa okolinom promjenom svojih temeljnih karakteristika, primjerice bojom krzna. Isto tako se prilagođavaju i organizacije i njihove strukture, dakle organske kojima je prilagodba i promjena u središtu pozornosti. [2]

DINAMIČKA STABILNOST ORGANIZACIJE U KONTEKSTU PODUZEĆA KOJE UČI

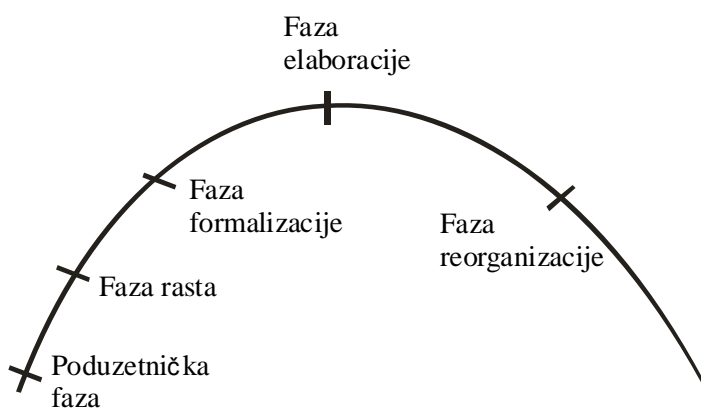
Vezano za progresivno i turbulentno tržišno okruženje koje je sve složenije u strukturi problema organizacije bi trebale biti dovoljno stabilne kako se ne bi nepromišljeno otvorile prema tržištu, a opet imati dovoljnu sposobnost prilagodbe vanjskih utjecajima proaktivnim razmišljanjem kako bi se mogle prilagoditi novonastalim promjenama.

Sama dinamička stabilnost organizacije bi se mogla potkrijepiti primjerice i letom aviona od polazišta do odredišta. Kad bi primjerice let od Zagreba do Londona trajao u 10 vremenskih faza, pod pretpostavkom kako je avion ispravan za letenje, piloti odmorni, a avion logistički opskrbljen informacijama, energijom i dobrima i kako avion kada polijeće na uzletno - sletnoj stazi se nalazi u fazi 1 pod kontrolom pilota i ostalim fazama (primjerice 2 i 3) dok ne dođe na krstareću visinu kad je na autopilotu, tada bi mogli reći kako je avion u fazi dinamičke stabilnosti (jer avioni naravno ponajviše padaju pri slijetanju i polijetanju). Pod pretpostavkom kako avion leti prema Londonu na autopilotu u fazama 4, 5 i 6, a slijeće u fazi 6,5, fazama 7,8, 9 i 10 gdje faza 10 predstavlja siguran izlazak putnika na terminal, mogli bi smo reći kao se avion opet nalazi u fazi dinamičke stabilnosti, osobito od faze 7 koja predstavlja slijetanje na uzlijetno – sletnu stazu, do pravilnog slijetanja na stazu pod idealnim kutem, izvlačenjem zakrilaca, stvaranjem obrnutog potiska poradi lakšeg zaustavljanja i stiskanja eventualno papučice kočnice.

Navedeno bi se moglo potkrijepiti i životnim ciklusom organizacije, primjerice u poduzetničkoj fazi, ili fazi izgradnje poduzeća gdje je glavni cilj poduzeća se identificirati na tržištu, primjerice programom tipa A. Razvoj je temeljen na mnogo rada, glavni cilj poduzeća je opstanak i preživljavanje na tržištu u smislu identifikacije, vlasnik poduzeća obavlja kontrolu osobno,

imao on menadžerske vještine ili ne, poslovi se što manje birokratiziraju. Ono što je potrebno učiniti je platiti sva davanja prema državi i dobavljačima kako bi poslovanje imalo nesmetan i kontinuiran tijek. Kada bi identifikacija uspjela došlo bi do rasta potražnje za proizvodima programa tipa A, te bi navedeno zahtijevalo više inputa. Logično, stvari koje se tu događaju su da se zarađeni novac ulaže u razvoj poslovanja, bilo vlastiti kapital, bilo zaduživanjem kod strane banaka na temelju financijske likvidnosti i solventnosti, emisijom dionica, ili prijavom na razne fondove domaćih i inozemnih subjekata kao i na natječaje za dodatan kapital, kako bi poduzeće lakše ušlo u fazu rasta, ili kolektivnog duha. Međutim pravilnim rukovođenjem poduzeće bi trebala razvijati programe tipa A1, A2, A3... i slično jer je struktura samih inputa u smislu proizvodno tehnoloških troškova ista, te ne bi došlo do razlaganja kapitala na program tipa B, ili primjerice C jer bi to naravno uvjetovalo sasvim drugačiju strukturu inputa i proizvodno tehnoloških troškova, te bi se zbog toga poduzeće moglo vratiti u prijašnje stanje ravnoteže, dakle opasti u fazi životnog ciklusa, otići u stečaj, ili čak likvidaciju. U smislu razvijanja novih programa, kad se poslovanje širi javlja se potreba uvođenja profesionalnog menadžmenta koji ima stručan autoritet koji bi vodio tvrtku u smjeru rasta. Kada bi poduzeće ušlo u fazu formalizacije i razvijalo programe A, B, C, D i E vertikalna diferencijacija postaje veća zbog opsega poslova, različitih pogleda vezano za politike prodaje i nabave, veličine tržišta, različite segmentacije kupaca, a samim time vjerojatno i veličinom poduzeća, a organizacija se sve više birokratizira i formalizira. *Top* menadžment se ovdje fokusira na strateška pitanja, planiranje i vođenje poslova na strateškoj razini dok se *middle* menadžment više fokusira na vođenje i organizaciju operativnog poslovanja koordinirajući između sve 3 razine menadžmenta.

Slika 2. Životni ciklus poduzeća



Izvor: izrada autora

Oba navedena primjera se mogu uspješno integrirati Lewinovim modelom upravljanja promjenama koji govori kako postoji 2 stanja organizacije prilikom provođenja promjene, te da proces promjena traje duže, ili kraće ovisno o složenosti i vrsti organizacijske promjene. Tako postoji prvo, sadašnje stanje organizacije koje ukazuje na to kako je organizacija funkcionirala prije provođenja promjene i drugo, buduće, željeno stanje organizacije koje opisuje kako će organizacija funkcionirati nakon promjene. [3] Između 2 navedene faze postoji i faza kretanja, tj. uspostavljanja novih odnosa. U sve tri faze organizacija se nalazi u fazi dinamičke stabilnosti, osobito u fazi kretanja.

Kako bi organizacije bile prilagodljive potrebama suvremenoga tržišta (znači dinamički stabilne), one moraju imati proaktivna poslovna razmišljanja temeljena na upravljanju pomoću ciljeva, transparentnoj organizaciji i stvaranju jednog dugoročnog korporativnog identiteta kako bi se takvom vrstom standardizacije olakšala fleksibilizacija prema sve složenijim i bržim promjenama u strukturi njihova problema, te da bi se otpor na promjene smanjio, ili u potpunosti uklonio. U tomu smislu se javlja potpuno jedan novi koncept, koncept “Poduzeća koje uči” koje se definira kao prihvaćanje promjena koje dolaze iz okruženja na način da se transformira organizacija, rukovoditelji, znanje i ponašanje svih suradnika u poduzeću. Promjene su ponajprije individualne, proaktivne, te su trajan proces i nisu jednokratne prirode. Pokreti i akcije “Poduzeća koje uči” svakako su odraz želje da poduzeće preživi i da se razvija, te da je konkurentno na međunarodnom tržištu. [4]

2. STILOVI RUKOVOĐENJA

Stilovi rukovođenja koji se navode u daljnjem tekstu se odnose na gospodarske organizacije, državnu upravu i na sve ostale vrste organizacija. Tako postoje tri temeljna stila:

Autokratski koji se usredotočuje na moć menadžera gdje se svi međusobni odnosi u poduzeću okreću prema rukovoditelju koji sam odlučuje i provodi odluke, određuje politiku firme, postupke, radne zadatke, odnose, nagrade i kazne.

Demokratičan stil gdje se naglašava uloga grupe zaposlenih u poduzeću i značajnija interakcija između članova grupe. Rukovodne funkcije podijeljene su između menadžera i grupe radnika. Ovdje radnici sudjeluju u donošenju odluka, pomažu menadžeru u formuliranju razvojne politike poduzeća i dogovaraju postupke za njihovo provođenje.

Laissez – faire (slobodan stil) podrazumijeva samostalnost radnika koji pri upravljanju trebaju minimalnu menadžerovu pomoć. Rukovoditelj ovdje svjesno određuje mogućnost slobode akcija radnika, slabije se upliće u takve akcije, ali je uvijek “prisutan” i spreman pomoći. [5]

Isto tako treba naglasiti kako postoje i drugi stilovi rukovođenja i poput diktatorskog, birokratskog, karizmatskog, konzultativnog i parcipativnog.

Također, Sikavica i Bahtijarević – Šiber još navode vezano za stilove vodstva da postoji teorija “X” i teorija “Y”, kontinuum vođenja, odnosi i strukture, teorija životnog ciklusa vođenja, menadžerska mreža, Fiedlerova situacijska teorija vođenja, teorija “Put do cilja” i Vroom – Yettonov model odlučivanja. [6]

Slika 3. Bihevioristički stilovi vodstva (Izvor: izrada autora)

| AUTOKRATSKI STIL | DEMOKRATSKI STIL | LAISSEZ-FAIR STIL |
|--|--|--|
| <ul style="list-style-type: none"> - vođa donosi odluke - sva moć pripada vođi - tijek komunikacije je odozgo prema dolje - vođa raspoređuje ljude na jasno definirane zadatke | <ul style="list-style-type: none"> - moć i odgovornost podijeljene između vođe i njegovih suradnika - prije donošenja odluke vođa se konzultira sa suradnicima - tijek komunikacija je dvosmjernan – odozgo prema dolje i odozdo prema gore | <ul style="list-style-type: none"> - vođa daje najviše slobode suradnicima - članovi grupe se upućuju da sami biraju zadatke i rade ono što najbolje mogu - tijek komunikacije je primarno horizontalan između ravnopravnih članova grupe |

3. DIMENZIJE ORGANIZIRANJA

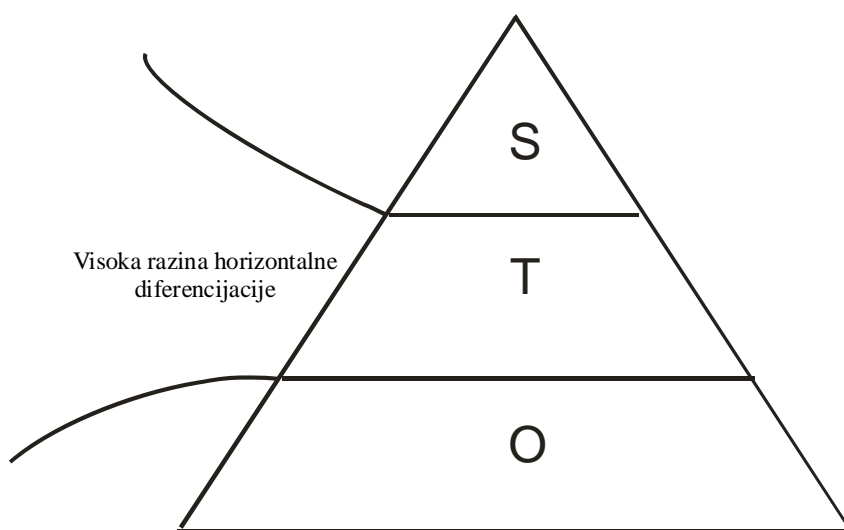
Moglo bi se reći kako organizacijsku strukturu svakog poduzeća determiniraju tri ključne funkcije organizacije, ili organiziranja, a to su složenost, formalizacija i centralizacija. Pere Sikavica u svojoj knjizi Organizacija iz 2011. spominje i podjelu rada i specijalizaciju, hijerarhiju, raspon kontrole, ovlast i odgovornost, delegiranje i koordinaciju, međutim sve navedene dimenzije su sadržane i u knjizi Poslovna organizacija u koautorstvu sa Mijom Novaku u njezinom 3. izmijenjenom i dopunjenom izdanju, samo su u novijoj knjizi detaljnije razložene.

Razina složenosti, formalizacije i centralizacije organizacije opredjeljuje izbor odgovarajuće organizacijske strukture, a time i načina funkcioniranja organizacije, te njezina lakšeg, ili težeg prilagođavanja utjecajnim čimbenicima organizacije koji opredjeljuju stupanj složenosti, formalizacije i centralizacije. Navedeno znači kako će organizacijska struktura poduzeća, u zavisnosti od utjecajnih čimbenika biti manje, ili više složena, formalizirana i centralizirana. [7] Tako će klasične, odnosno birokratske strukture biti u značajnoj mjeri složene, formalizirane i centralizirane, za razliku od organskih struktura koje će karakterizirati neznatna složenost, formalizacija i centralizacija. Drugim riječima, organske strukture su jednostavne, decentralizirane i neznatno formalizirane strukture. [8] Govoreći o konkretnim dimenzijama u nastavku će biti detaljnije obrazložene.

- Složenost organizacije podrazumijeva razinu horizontalne i vertikalne diferencijacije organizacije.

Horizontalna diferencijacija u biti predstavlja podjelu zadataka u organizaciji na različite podzadatke na istoj razini organizacije, tj. podjelu zadataka po širini organizacije, kada bi gledali organizaciju klasično piramidalno sa svojom strateškom, taktičkom i operativnom razinom. Horizontalna diferencijacija može biti uža, ili šira u ovisnosti o broju organizacijskih jedinica na jednoj od hijerarhijskih ljestvica menadžmenta. Što je horizontalna diferencijacija veća na jednoj razini organizacija je složenija i obrnuto, premda to nužno ne mora značiti, ako je razina vertikalne diferencijacije niska, poduzeće je manje i obavlja manji obim poslova, ali je horizontalna složenost veća, ili manja poradi specifičnosti poslova koji se obavljaju, i ljudi koji obavljaju takve poslove. U takvim organizacijama pojačana je *razina know – how – a*, podjela rada i specijalizacija je plitka, premda to nužno ne mora značiti jer ovisi o opsegu opsegu i strukturi poslova koje pojedinci obavljaju. Hijerarhije kod horizontalne diferencijacije nema, ili gotovo ne postoje kao i raspon kontrole jer je naglasak na komunikaciji, ovlasti i odgovornosti su spuštene na niže razine jer su pojedinci više formalno i neformalno obrazovaniji, kao i delegiranje zadataka. Koordinacija se uglavnom nalazi na nekim “srednjim” razinama. Kao što je već naglašeno visoka razina horizontalne diferencijacije se ostvaruje u onim organizacijama koji imaju kvalitetan ljudski resurs koji je determiniran njihovim formalnim, neformalnim i informalnim znanjima, sposobnostima, vještinama i iskustvima. Jedan od primjera za prihvaćanje šireg opsega poslovnog zadatka na horizontalnoj razini može biti i dijagonalno napredovanje na hijerarhijskoj ljestvici menadžmenta, primjerice ako radnik radi u poslovnoj organizacijskoj jedinici nabave, a kasnije prelazi u prodaju. Poslovanje vezano za dvije navedene funkcije je dosta slično, te se prilikom formiranja organskih struktura takvi radnici bolje prilagođavaju i mogu obavljati veći obim poslova. Horizontalno diferencirane organizacije su najčešće timske i procesne.

Slika 4. Primjer visoke horizontalne diferencijacije

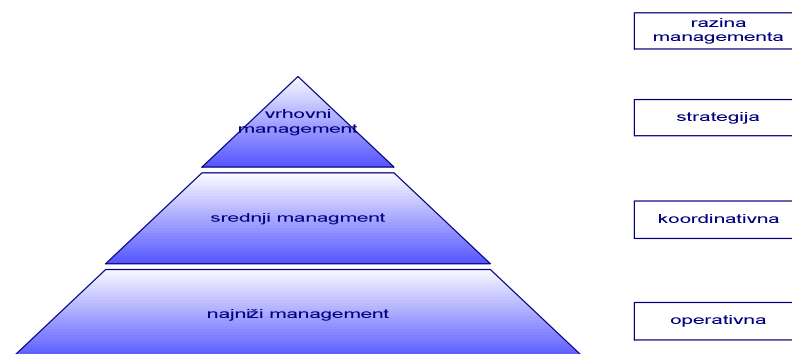


izrada autora

Izvor:

Vertikalna diferencijacija predstavlja podjelu zadataka po dubini organizacije, tj. klasične menadžerske hijerarhijske strukture. Kada je poduzeće “veliko”, bavi se različitim proizvodnim programima za koje je potrebno obavljati mnogo složenih aktivnosti, operacija i postupaka, razina vertikalna diferencijacija će biti veća, primjerice kod velikih međunarodnih korporacija. Sama veličina organizacije uvjetuje relativno veću podjelu rada i specijalizaciju osim ako se ne radi o matičnim kao i hipertekst organizacijskim strukturama. Organizacije su u ovom smislu znatnije formalizirane sa većim naglaskom na hijerarhije i koordinaciju, ovlast i odgovornost su jasnije precizirane, a delegiranje je dosta široko s obzirom na veličinu organizacije. Tipičan primjer tvrtki koje imaju visoku razinu vertikalne diferencijacije su tvrtke koje se nalaze između faze visokog rasta i faze elaboracije u životnom ciklusu poduzeća.

Slika 5. Razine menadžmenta u organizaciji



Izvor: izrada autora

• Govoreći o formalizaciji organizacije treba istaknuti kako je to ona “prava” organizacija i organizacijska struktura propisana organizacijskim aktima poput statuta, pravilnika i sl. gdje se nalaze jasno precizirane upute i procedure o hijerarhijskoj strukturi, radnim mjestima, nosiocima zadataka, sredstvima za ispunjenje zadataka i vremenom kako bi se ostvarili zacrtani organizacijski ciljevi. Potrebno je istaknuti kako su formalizirane organizacije u znatnoj mjeri složene pretpostavljajući pod tim njihovu veličinu, i nefleksibilne na promjene u okolini jer se manji sustavi uglavnom lakše i brže preorijentiraju novom načinu poslovanja. U tom smislu se pojavljuje i pojam formalne i neformalne organizacije. Formalne organizacije su svjesno postavljene gdje je organizacija i njezina struktura rasčlanjena temeljem načela i osnova organizacije i organiziranja, dok neformalnu organizaciju čine ostale sekundarne grupe unutar formalne organizacije sačinjene od najmanje 2 do 10 članova, može i više ovisno o veličini poduzeća i temeljima povezanosti između članova. Takve neformalne organizacije nastaju na osnovu stvaranja zajedničkog identiteta, uvjerenja, mišljenja, stavova, filozofije, rituala i ceremonija i obično više doprinose stvaranju korporativnog identiteta i kulture koji danas diverzificira slične tvrtke na tržištu i čini ih konkurentnim u smislu održivog razvitka. Neformalne organizacije su u neznatno složene i formalizirane, a primjer takve vrste organizacijske strukture bi bila timska i projektna organizacijska struktura.

• Govoreći o centralizaciji organizacije možemo reći kako ona predstavlja pravo na upravljanje, delegiranje prava, ovlasti, obveza i odgovornosti iz jednog centralnog mjesta odlučivanja, bila to uprava na temelju stručnog autoriteta, ili na temelju udjela koje ima u kompaniji, bio to centralni izvršni direktor koji uglavnom provodi odluke uprave. Centralizirano se upravlja u malim i srednjim poduzećima, ili iznimno u velikim koja obično proizvode 1 proizvod, a podjela rada u poduzeću, grupiranje i povezivanje poslova, kao i formiranje organizacijskih jedinica se provodi prema poslovnim funkcijama, gdje je broj poslovnih funkcija uglavnom jednak broju funkcionalnih jedinica (odjela, odsjeka i sl.). Veliku pomoć centraliziranom načinu upravljanja se može pripisati i objedinjavanje srodnih i sličnih poslova. Karakteričan centraliziran način upravljanja se još danas relativno dosljedno provodi u funkcijskoj, ili funkcionalnoj organizacijskoj strukturi u stabilnim uvjetima poslovanja i u fazi izgradnje životnog ciklusa poduzeća što možemo vidjeti na slijedećem prikazu.

Slika 6. Funkcionalna organizacijska struktura



Izvor: Horvat, Đ, Perkov, D., Kovačić, M., Trojak, N., Krajnović, A. (2015) *Temeljne funkcije upravljanja, 2. dopunjeno i prošireno izdanje*, Visoko učilište EFFECTUS – Visoka škola za financije i pravo, Zagreb, str.103.

3.1. ELEMENTI ORGANIZACIJSKE STRUKTURE

Oblikovanje organizacijske strukture bitno je radi provođenja zadataka i jasnoga definiranja odgovornosti za rezultate gospodarskih subjekata. Njegovo besprijekorno funkcioniranje podrazumijeva odlučivanje, koordinaciju na svim razinama te apsolutnu uspostavu mreža komuniciranja koje održavaju i podržavaju ostvarenje planiranih ciljeva. Organizacijska struktura treba biti oblikovana tako da razjasni tko će obavljati zadatke i tko je odgovoran za rezultate, da ukloni prepreke te dovede do odlučivanja i mreža komuniciranja koji odražavaju i podržavaju ciljeve gospodarskog subjekta. [9] Također, organizacijska struktura predstavlja sustav zadataka, odnosa nadređenosti i podređenosti i komunikacijskih veza kao okvir uz pomoću kojega organizacija definira kao su podijeljeni zadaci, korišteni resursi i koordinirane organizacijske jedinice, predstavlja anatomiju organizacije, te je izuzetno važno naglasiti kako je to dinamičan element organizacije. Organizacijsku strukturu čine slijedeći elementi:

organizacija materijalnih čimbenika - obuhvaća organizaciju materijalnih inputa (sirovina i materijala) kao i opreme (organizaciju kapitalnih dobara).

organizacija ljudskog čimbenika – obuhvaća sve probleme vezano za organizaciju ljudi, odabir i popunjavanje radnih mjesta, te integraciju i socijalizaciju ljudi u radnoj sredini.

rasčlanjivanje zadataka – obuhvaća podjelu ukupnog zadatka poduzeća na posebne i pojedinačne poslove.

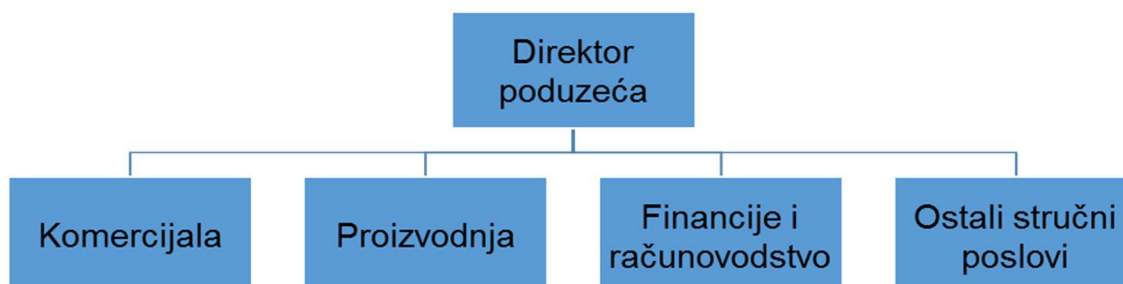
organizacija upravljanja i managementa – obuhvaća problematiku organizacije i upravljanja i organizacije managementa kao i ostalih međusobnih odnosa.

organizacija vremenskog redoslijeda poslova – obuhvaća istraživanje vremenske usklađenosti svih činitelja proizvodnje i čitavog tijeka proizvodnje i poslovanja. [10]

Prije svega bitno je shvatiti kako navedeni elementi organizacijske strukture moraju djelovati u optimalnom kombinacijsko – koordinacijskom međudonosu, tj. moraju biti harmonizirani, s obzirom na promjenu unutarnjih činitelja poduzeća i dinamiku koju uvjetuju vanjski činitelji oblikovanja poduzeća.

3.2. UTJECAJ DIMENZIJA ORGANIZIRANJA NA KLASIČAN ORGANIZACIJSKI DIZAJN

Slika 7. Funkcionalna organizacijska struktura, klasičan organizacijski dizajn



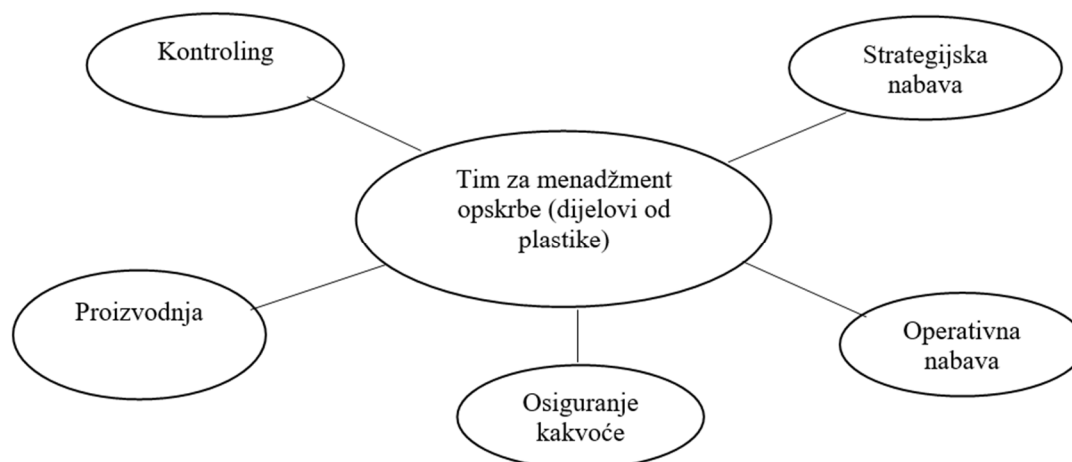
Izvor: izrada autora

Na slici 7. prikazana je funkcionalna organizacijska struktura koja bi se prema mišljenjima autora još jedina kao takva mogla nazvati klasičnom, te je temeljena na autokratskom načinu upravljanja. Vezano za razinu složenosti organizacije moglo bi se reći kako je organizacija složena s obzirom na razinu vertikalne diferencijacije koja je visoka, a manje složena s obzirom na razinu horizontalne diferencijacije koja je niska jer su radnici usko specijalizirani za

obavljanje svojih funkcija, primjerice u poslovnoj organizacijskoj jedinici Financije i računovodstvo. Gledajući funkciju Komercijale koja obuhvaća nabavne, prodajne i marketinške poslove moglo bi se reći kako je razina horizontalne diferencijacije široka vezano za sličnosti obavljanja poslova. Kada bi poduzeće podijelilo poslovni organizacijski odjel Komercijale na odjele Nabave, Prodaje i Marketinga uslijed primjerice širenja proizvodnog programa i povećanja obima poslovanja u primjerice fazi rasta sa A, na A1, A2 i A3 moglo bi se reći kako je razina horizontalne diferencijacije široka, međutim s obzirom kako se podjela rada, grupiranje i povezivanje poslova u poduzeću obavlja prema poslovnim funkcijama prikladan način upravljanja bi i dalje bio autokratski sa malo manjom razinom centralizacije i dosta izraženom formalizacijom zbog obima samih poslova i faze životnog ciklusa u kojoj se poduzeće nalazi. Nedostatak ovakve vrste rukovođenja su slabi odgovori na izazove iz okoline, jednosmjerna komunikacija, ali izvrsna koordinacija unutar funkcija.

3.3.UTJECAJ DIMENZIJA ORGANIZIRANJA NA ORGANSKI ORGANIZACIJSKI DIZAJN

Slika 8. Timska organizacijska struktura



(Izvor: izrada autora)

Na prethodnom slici prikazana je timska organizacijska struktura poslovne organizacijske jedinice nabave. Radom tima koordinira centralni rukovodni tim, tim za menadžment opskrbe dijelova od plastike. Ovakva organizacijska struktura nema hijerarhiju, ili je vrlo plitka zbog postojanja navedenoga tima. Vezano za specifičnosti poslova kako bi se poduzeće opskrblilo plastikom potrebno je podijeliti poslove u timove. U timu Strateška nabava se istražuju dobavljači, proizvodi, konkurencija, tehničke karakteristike proizvoda i sl. U njemu se nalaze stručnjaci različitih profila od ekonomista, do primjerice inženjera strojarstva, elektrotehnike i softver inženjera ako je proizvod izrazito visokih funkcionalno tehničkih karakteristika. Nakon što se odredi koji proizvodi će se nabavljati od određenih dobavljača Operativna nabava preuzima svoj dio posla, od slanja upita, prijama, ispitivanja i vrednovanja ponuda do zaključivanja ugovora o nabavi. Kako je rečeno, ako je riječ o proizvodu izrazito visoke tehničke kvalitete u timu se mogu nalaziti inženjeri zaduženi za različita proizvodna područja. Nakon što se kupoprodajni ugovor sklopi roba se transportira putem vozara na dobavno skladište poduzeća gdje tim Osiguranje kakvoće vrši kvantitativnu i kvalitativnu kontrolu dobara koja može biti stopostotna, ili na temelju uzorka. Ako je sve u redu tim zaprima robu i šalje dokumente u službu Nabave koje dalje nakon detaljnog provjeravanja svih dokumenata

šalje dokumente na plaćanje u službu Računovodstva i financija. Ako postoji otklon od tolerantne kakvoće, ili kvantitete uzrokovano primjerice osnovnim i dopunskim prijevoznim rizicima dobavljačima se šalje reklamacija da izvrše popravke na robi, ili ih se obično penalizira politikom kazni vezano za politike plaćanja roba i usluga jer je riječ o robi koja nema karakteristike potpisane ugovorom. Također, ako su potrebne hitne narudžbe, ili narudžbe supstituta dobavljač se penalizira kako bi se poduzeću nadoknadilo izgubljeni dobitak.

U procesu proizvodnje roba se raznim procesima pretvara u manje, ili veće jedinice količine. Sve navedeno sa strateškog nivoa prati služba Kontrolinga gdje se mogu nalaziti ekonomisti i stručnjaci za različita proizvodna područja koji sa strateškog nivoa pružaju podršku glavnome timu i na taj način uvjetuju dinamiku tekućeg i budućeg poslovanja.

Svi navedeni timovi su specijalizirani za obavljanje specifičnih vrsta poslova, zapravo fraktalizirani, ovlaštenje odlučivanja nemaju pojedinci, negoli se odluke donose suradnjom članova u timu te samim time svaki tim nema hijerarhiju i povećava se motivacija između članova tima, neformaliziran je, a čitava organizacijska struktura decentralizirana pa se omogućuje demokratičan način rukovođenja.

Sinergijom i harmonizacijom svih timova ostvaruje se optimalan poslovni učinak.

4. SUVREMENI ORGANIZACIJSKI DIZAJN I SUVREMENI ORGANIZACIJSKI TRENDVI

Govoreći o suvremenom poslovanju u vremenu hiperkonkurencije kada je ponuda dobara na većini tržišta i sektora veća negoli potražnja organizacije se neprijeporno moraju prilagođavati novonastalim promjenama. Prilagođavanje je moguće jedino konstantnim unaprijeđivačkim naporima temeljenim na znanju. S obzirom na složenost poslovanja, sve veću ekspanziju tržišta na globalnom nivou, eksternalizacije aktivnosti i orijentiranje na sržne programe, prebacivanje proizvodnje sa visoko razvijenih i razvijenih na srednje i nerazvijena tržišta, tako se širi i znanje. Konkurentnije kompanije i konkurentnija gospodarstva u tom smislu konstantno moraju razvijati sposobnost prilagodbe u općem kaosu koji vlada na tržištu, a jedini dogovor na to je samoorganizacija temeljena na inoviranju, otvorenosti, receptivnosti, prilagodljivosti i spremnosti na učenje kako bi se stvorila nova specijalizirana znanja, a opet interdisciplinarna kako bi radnici znali u kojem kontekstu djeluju i na taj način održala konkurentna sposobnost i prednost. Kod takvih organizacija njihova sama struktura nalaže primjenu demokratskog, ili *laisses faire* stila rukovođenja, premda niti klasično autokratski stilovi rukovođenja danas nisu loši. Organizacije u tom smislu postaju sve manje složene, formalizirane i centralizirane, iako se prava istina nalazi zapravo u “sredini” poradi sve promjenljivijih okolnosti u poslovanju. Iako je težište suvremenog poslovanja vezano za navedene dimenzije usmjereno organskim strukturama, manjoj složenosti, formalizaciji i centralizaciji, ne stvaraju se neka nova načela organizacije, negoli se poradi njene dinamičke stabilnosti težište stalno pomiče između njezinih dimenzija i uvjetuje slijedeće navedeno:

- manju, ili veću razinu centralizacije i decentralizacije,
- dublju, ili pliću podjelu rada,
- užu, ili širi raspon kontrole i komunikacija,
- statičnu birokratsku organizaciju, ili inovativnu organsku,
- autoritet pojedinca, ili timski rad,
- poštovanje, ili nepoštovanje ljudi u organizaciji,
- upravljanje ljudima, ili upravljanje stvarima i procesima,
- postojanje, ili nepostojanje kulture organizacije,
- nespremnost, ili spremnost na stvaranje promjena u organizaciji.

Vežano za sve dosada navedeno u ovome radu i sve složenije i brže promjene teško je odrediti u kojem će se smjeru organizacijski dizajn razvijati, međutim sa sigurnošću se može reći kako će se umreženost povećati, kao stvaranje supstrukture, nadstrukture unutar mreže. U tome smjeru će biti i orijentirana buduća istraživanja autora ovoga rada.

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PROCESNI PRISTUP U ORGANIZACIJI I PROJEKTNI MENADŽMENT

PROCESS APPROACH IN AN ORGANIZATION AND PROJECT MANAGEMENT

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Sadržaj: *Primena procesnog pristupa i formiranje procesno orijentisane organizacije podrazumeva potpuno korišćenje svih vrednosti menadžmenta poslovnih procesa, kao i organizovanje na drugačiji način, drugačiji pristup rešavanju ključnih pitanja. Suština procesnog pristupa jeste u načinu obavljanja rada u okviru organizacije i održavanja uravnoteženih odnosa između investiranja u proizvode i investiranja u procese sa posebnim osvrtom na radne aktivnosti u svim sektorima. Procesna organizacija se posmatra kroz vrednost troškova, potrošeno vreme i zadovoljenje korisnikovih potreba. Ključnu funkciju u sprovođenju strategija upravljanja i organizovanja u organizaciji ima menadžment. Primenom profesionalnog menadžmenta, vođenjem računa o resursima i modernim trendovima u sistemu globalizacije koja se nameće i procesnim pristupima u organizovanju, svaki organizacioni sistem postiže veću efikasnost i efektivnost. Brzinu promena u organizaciji u današnjem poslovnom svetu određuje praćenje tehnoloških trendova i zahteva globalne ekonomije, kao i primena informacionih tehnologija. U današnjem vremenu, moderne organizacije zasnivaju svoju poslovnu aktivnost na realizovanju projektnih formi i primeni projektnog menadžmenta. Projektni menadžment se uveliko primenjuje u svim poslovnim delatnostima, a naročito u oblasti investiranja, istraživanja, raznim ispitivanjima u okviru vojno – bezbednosnih struktura, u oblasti medija i marketinških organizacija. Projektni način poslovanja podrazumeva rad u timovima koji su sastavljeni od ljudi koji ranije nisu radili zajedno, pa je iz tog razloga neophodno raditi na tome da se što bolje oformi radni tim i smanji rizik uspešnosti. Kako bi se dobila procesno orijentisana organizacija neophodno je proći nekoliko faza, inicijalizacija projekta, analiziranje okruženja unutar i spolja, da se predoče strategije i postavi cilj, da se izvrši projektovanje modela i primena istog, kao i mogućnost promene u smislu usavršavanja i modernizacije.*

Ključne reči: *proces, organizacija, menadžment, projekat, promene*

Content: *Application of the process approach and creation of a process-oriented organization imply the use of all the values of business process management, as well as setting the organization in a different manner and taking a different approach to solving key issues. The essence of the process approach is the manner of performing activities in the organization and maintaining a balance between investing in products and investing in processes, with a particular emphasis on work-related activities in all sectors. The process organization is*

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evaluated through the amount of expenditure, the time spent and customer satisfaction. The management has the key role in the implementation of management and organization strategies. Each organizational system achieves greater efficiency and effectiveness through applying professional management, taking resources and modern trends of globalization into account, as well as through the process approach in organization. The rate of change in the organization in today's business world is determined by keeping up with technology trends and demands of the global economy, as well as the application of information technology. Nowadays, business activities of modern organizations are based on the implementation of projects and application of project management. Project management is widely applied in all business activities, especially in the field of investment, research, various studies within military and security structures, in the field of media and marketing organizations. The project business method involves working in teams composed of people who have not worked together before, and consequently it is necessary to set up the best possible teams and reduce the risk of failure. In order to create a process-oriented organization it is necessary to go through several stages – to initialize the project, analyze the environment both inside and outside, present strategies and set the goal, design and apply the model and be able to change in terms of development and modernization.

Keywords: *process, organization, management, project, change*

1. UVOD

Svetsko tržište zahteva brze promene i kontinuitet u promeni organizacione strukture. Kako bi organizacija uspešno poslovala neophodno je da unutrašnji i spoljašnji činioци budu zadovoljeni. Spoljašnji činioци su orijentisani na kupce i njihove potrebe uz obavezan nivo kvaliteta. Unutrašnji činioци su orijentisani na uspešnost poslovanja, proizvodnju, marketing i ostale troškove koji prate proizvodnju a sve u cilju smanjenja istih.

Projekti skoro uvek podrazumevaju suočavanje s problemima koji se logički ne uklapaju u organizaciju. Projekti se pojavljuju na raznim mestima i u svim mogućim organizacijama. Upravljanje projektima primenjuje se u svim situacijama jer bez obzira na tehničke i poslovne oblasti kojima pripadaju, svi imaju potrebu za strukturom.

Da bi mogli upravljati moramo uvek učiti. Najbolje se uči iz iskustva. Zapravo, učimo jesti, puzati, hodati i komunicirati stalnim pokušajima i pogreškama - preduzimanjem akcije i sagledavanjem posledica te akcije. Nakon toga preduzimamo novu i drukčiju akciju. Svako od nas, ima „horizont učenja“, opseg vizije u prostoru i vremenu, unutar kojega procenjujemo svoju sposobnost. Ali šta se događa ako su primarne posledice naših akcija u dalekoj budućnosti ili u dalekom delu većeg sistema unutar kojega delujemo. Kad naše akcije imaju posledice izvan našeg horizonta učenja, postaje nemoguće učiti iz sopstvenog iskustva. U tome je srž, dileme učenja s kojom se suočavaju organizacije: najbolje učimo iz iskustva ali nikad kontinuirano ne osećamo posledice mnogih svojih važnih odluka. Najvažnije odluke donesene u organizacijama imaju uticaj u celom sistemu, koje se osećaju godinama. Imenovanje pravih ljudi na rukovodeće položaje, godinama oblikuje organizacionu klimu i strategiju.

2. PROCESNO ORIJENTISANA ORGANIZACIJA

Razvoj novih procesa i tehnologija doveo je do toga da veliki organizacioni sistemi promene koncepte poslovanja. Svakom promenom klasičnog modela organizovanja stvaraju se novi modeli koji funkcionišu na nivou strategije poslovne jedinice. Ovom promenom nastao je i projektni način organizovanja.

Primenom ovih modela decentralizovani su poslovni sistemi i organizacija se lakše uklapa u promene u okruženju. Uvođenjem procesne – horizontalne organizacije analiza poslovanja je postala konstantnija i kontrola troškova je efikasnija. Menadžeri u organizaciji dobijaju drugu ulogu, manji je broj nivoa menadžmenta, fleksibilnost je na većem nivou i komunikacija je rasterećenija. Menadžeri prelaskom na ovaj vid poslovanja gube deo kontrolne funkcije ali su ovim promenama postali uticajni.

U literaturi se nailazi na više poslovnih procesa koji se mogu okarakterisati kao procesi podrške i svaki od njih sadrži u sebi veliki broj aktivnosti.

Najvažnije karakteristike procesno orijentisane organizacije su:[1]

- U svakom procesu imamo svog korisnika, i samim tim što smo svu pažnju usredsredili na proces tim smo više usredsređeni na korisnika.
- Kreiranje vrednosti koja se izražavaju kroz finalni proizvod odvijaju se u horizontalnim procesima u organizaciji.
- Ukoliko se definišu pojmovi okruženje, korisnik i isporučioći procesa postiže se bolja komunikacija i kvalitetniji odgovor na postavljene zahteve i ciljeve.
- Upravljanjem procesom kroz sektore postiže se više nego upravljanjem pojedinačnim sektorima.
- Vlasnik procesa je određen i odgovoran za sve u procesu i nema dotadašnjeg izbegavanja odgovornosti.

Upravljanje procesima daje veće mogućnosti za upravljanje vremenom i svim ostalim resursima. U procesnoj organizaciji imamo izostanak vertikalne (hijerarhijske) strukture ali takva organizacija u praksi se retko sreće.

Procesno orijentisana organizacija poseduje svoju dinamiku odnosno jednostavnije menja načine organizovanja realizujući ciljeve vezane za korisnike i proizvode. Klasičnu hijerarhijsku strukturu nije tako jednostavno unapređivati i meriti dok procesno orijentisanu organizaciju odlikuje stalno analiziranje naročito njenih osnovnih parametara – vreme, kvalitet, troškovi, zadovoljstvo korisnika, kvalitet proizvoda, itd.

2.1. KONCEPT PROCESNO ORIJENTISANE ORGANIZACIJE

Da bi se kreirala procesna organizacija važno je definisati primarne procese i analizirati ključne aktivnosti koje su potrebne. To je osnova kako bi se krenulo sa kreiranjem organizacione strukture. Međutim, menjanje organizacione strukture iz funkcionalne u procesnu ne znači i efikasnije poslovanje.

Po ovoj ideji imamo dva pristupa. Prvi da se organizacija odmah usredsredi na poslovne procese i korisnike, a drugi insistira da se postepeno dodaju poslovni procesi dok se organizacija u potpunosti ne reorganizuje na nov način poslovanja. [2]

Po saznanja Frenka Ostroffua osnovna operativna jedinica jeste menadžment tim sa osnovnim fokusom na korisnike dok se primenom internih mera ne poboljšava proporcionalna vrednost koja bi se isporučila potrošaču. Glavni koncept horizontalne organizacije je da se nefleksibilnost može jednostavno prevazići stvaranjem i organizovanjem timova u kojima su uključeni timovi prvog reda (prve linije) i zaposlenih koji su vezani za problem. Da bi se mogla formirati horizontalna (procesna) organizacija potrebno je imati u vidu 12 osnovnih principa od kojih se 5 odnosi na dizajn a 7 na institucionalne promene.

Principi koji se odnose na dizajn zahtevaju:

- organizovanje oko bazičnih kros-funkcionalnih procesa;
- definisanje vlasnika procesa;
- formiranje timova kao temelja organizacionog dizajna;
- integrisanje sa korisnicima i dobavljačima;
- smanjenje hijerarhije na način da se eliminiše posao koji ne doprinosi povećanju vrednosti i po dodeli posla timskim igračima koji imaju autoritet da donesu odluke.

Principi koji se odnose na institucionalizaciju promena obuhvataju:

- Rad na unapređivanju kulturne otvorenosti i kolaborativne saradnje, kooperativnog delovanja, kao i odgovorno delovanje na kooperativnost i ovlašćenja koja treba da budu prenesena na ovlašćena lica u timu a sve u cilju ostvarivanja strategije blagostanja.
- Raspedela poslova na ovlašćena lica kojima se daju instrukcije da putem obrazovanja veštinama, motivacionim tehnikama i autoritativnim sugestijama obezbede sigurno sprovođenje promena.
- Upotrebom najsavremenijih informativnih tehnologija stvara se tržišna utakmica u okruženju i obezbeđuje se adekvatna konkurencija.
- Merenjem ostvarenosti ciljeva treba imati u vidu da li je postignut nivo zadovoljenja kupaca, zaposlenih i da li je dobit dostigla zacrtani nivo.
- Učešće u redizajniranju preuzimaju partnerske firme u zajedništvu sa osnovnim grupama koje učestvuju od samog početka u procesnom timu.
- Stavljanje akcenta na kompetentnosti i obuku ljudi koji moraju biti obučeni i vešti da rade i rešavaju nastale probleme i one koji eventualno mogu nastati u budućnosti.
- Rad na promociji veština i kreativnih sposobnosti.

Dessler smatra da je za kreiranje horizontalne korporacije najvažnije uraditi:

- odrediti strateške ciljeve,
- analizirati ključne kompetitivne prednosti za ostvarivanje cilja,
- definisati ključne, suštinske procese za postizanje ciljeva,
- organizovanje procesa a ne funkcija,
- eliminisanje svih aktivnosti koje ne povećavaju vrednost ili ne doprinose ključnim ciljevima,
- smanjivanje funkcije i personala po odeljenjima na minimum, čuvajući ključna stručna znanja,
- zapošljavanje menadžera ili tima kao vlasnika svakog ključnog procesa,
- kreiranje multidisciplinarnih timova za svaki proces,
- određivanje posebne karakteristike ciljeva,
- dodeliti zaposlenima autoritet i dati im informacije potrebne za postizanje ciljeva,

- rad na obučavanju, nagrađivanju, povećanju nagrada, povećanju budžeta i novih kvalitetnih tehnika koje bi doprinele zadovoljenju kupčevih zadovoljstava i njihovih potreba.

Uzimajući u obzir performanse za kvalitetno dizajniranje svaka procesna organizacija putem primene klasičnog procesa organizovanja može svoju strategiju poslovanja dovesti do cilja ako: [1]

- Shvati da je dizajniranje u organizaciji jedan od osnovnih planova u poslu i razvoju i sprovođenju strategije u poslovnom i razvojnom smislu.
- Rad na primeni različitih metodologija izvođenja projektnih koncepata na osnovama naučnog istraživanja.
- Sprovođenjem i razradom planskih aktivnosti usmerenih za ostvarivanje projektnih zadataka.
- Uspostavljanjem dobre klime pre samog početka realizacije projekta u smislu dobrih kadrova, obezbeđenje sredstava u budžetu i slično.
- Dobro odrađen pripremni period za sprovođenje organizacionih promena rezultiraće u dobrom psihološkom pristupu i obrazovanju osoba izabranih u tim.

3. PROJEKTNİ MENADŽMENT

Projektni menadžment je područje u okviru organizacione teorije i prakse koje je u konstantnom razvoju. Iako je projektni menadžment dugo prisutan u ekonomskoj praksi, tek u nekoliko poslednjih decenija dobio je zaslužen mesto u teoriji, kao i u praksi modernih organizacija („Nema ništa snažnije od ideje čije je vreme došlo.“) a samim tim ni jedna organizacija koja je primenila projektni menadžment nije od njega odustala.

U teoriji su poznata dva osnovna pristupa koja se koriste za projektovanje organizacije i upravljanje projektom. Jedan od njih je klasičan pristup koji organizaciju vidi kroz funkcionalnu, projektnu i matičnu formu. U odnosu na klasični pristup kontingencijski pristup je savremeniji i moderniji a savremena organizaciona učenja predlažu kombinovanje ovih pristupa. [3]

U poslovnoj praksi, svakodnevno je susretanje sa projektima, pa se u ekonomskom smislu redovno koriste za ostvarivanje poslovnih ciljeva kojima su ograničeni resursi i kritični rokovi. Promene na tržištu traže od modernih organizacija zaokret od 180° i podsticanje kreativnih pojedinaca koji prihvataju promene kao način života i vuku napred stvarajući dodatnu vrednost celog društva. Promene koje se događaju svakog dana moraju se početi gledati kao prilike i šanse koje nam se nude, a ne kao pretnja (Drucker: Postoje dve vrste menadžera – brzi i mrtvi) te se orijentisati na ljude kao temeljnu konkurentsku prednost. [2] Ostvarivanje čovekove ideje kroz radne aktivnosti može se nazvati imenom projekat.

Projekat je skup aktivnosti koje su u međusobnoj zavisnosti i objedinjene kroz vreme i novac. Projekat ima sve elemente poslovnog procesa i predstavlja poduhvat koji se odvija u budućnosti sa odgovarajućim rizikom i neizvesnošću a u većini slučajeva ga rade projektni timovi. Projekat sadrži konačne ciljeve koje treba postići u čijoj realizaciji učestvuju ograničeni resursi. Projekat zahteva koordinaciju u realizaciji i tom prilikom koristi tehnike mrežnog planiranja.

Upravljanje projektima nije jednostavan proces, jer zahteva izračunavanje vremena realizacije i sa tim i utrošak finansijskih sredstava. Sve ostale aktivnosti koje se rešavaju u procesu projekta su lako rešive (alat, mašina – sredstvo, korišćenje energije i drugo). U upravljanju projektima

učestvuju nauka i ljudski resursi. Ljudski resursi su neminovnost svake realizacije proizvoda sem automatskog postupka gde je čovek kontrolor tehnološkog postupka proizvodnje. U toku realizacije projekta najveću odgovornost snosi projektni tim i menadžment.

Poslovne organizacije, uklapajući se u globalno tržište, se moraju puno brže prilagođavati izazovima iz okoline uz konstantne probleme kao i upravljanju poslovima u kojima su oskudni resursi. Situacija je teška jer većina organizacija ima klasične organizacione oblike koji se temelje na centralizaciji u donošenju odluka, sa naglaskom na formalizaciji procedura i relativnoj vertikalnoj i horizontalnoj složenosti gde informacije idu bez ikakvog pravila. Informacija koja nije stigla na vreme najčešće vodi ka lošoj poslovnoj odluci. Organizacije postaju simbioza stabilnosti i haosa. Projektni menadžment omogućuje kontinuirano prilagođavanje tržištu u skladu s vizijom i misijom organizacije. Organizacije koje koriste načela projektnog menadžmenta u stanju su ne samo da smanje troškove već i da na najbolji mogući način reaguju na trendove i izazove tržišta na koja su usmerene i okruženje u kojem se nalaze. Proces prilagođavanja u modernom biznisu i savremenoj ekonomiji nije nikakva novina ali su danas te promene intenzivnije. Uspeh promena će zavisiti od spremnosti i pripreme ljudi, od vođa, kulture i institucija, informatičke tehnologije i komunikacija pri radu. Organizaciju čine grupe ljudi koji se bave različitim stvarima koji se mogu svrstati u projekte i procese. Pod procese spadaju aktivnosti koje se kontinuirano obavljaju ili u kojima je poznat sled operacija koje se ponavljaju kad god je to potrebno i koje treba prilagoditi.

Projekat je skup procesa i poslova koji zahtevaju da se za te potrebe napravi i organizuje način izvođenja, omogući realizacija, izvrši kontrola i moguća korekcija plana. [3] Primena projekata koristi se u raznim područjima: ekonomiji, proizvodnim procesima, u naučnim istraživanjima u privredi, istraživanju, kod vojske, u finansijskim i drugim organizacijama.

Znanje stečeno na nekom projektu može se primeniti i u organizaciji i može se primeniti u svim sektorima poslovanja. Suština svih projekata je njihova kratkotrajnost i mali broj učesnika i oni ne zahtevaju velike i dugotrajne pripreme.

4. ZAKLJUČAK

Da bi dobili procesno orijentisanu organizaciju neophodno je proći kroz nekoliko razvojnih faza. Različiti modeli zahtevaju da se inicijalizuje projekat, izvrši analiza okruženja unutar i spolja, da se predoče strategije i postavi cilj, da se izvrši projektovanje modela i primena istog kao i mogućnosti promena u smislu usavršavanja i modernizacije. Organizacija se posmatra kao zajednički skup procesa koji će dovesti do krajnje zacrtanog cilja kao što je nov proizvod, nova usluga ili podrška koja je potrebna organizaciji da bi bila konkurentna na tržištu cena i novih informacionih tehnologija.

Organizacije koje rade i opstaju u sadašnjim turbulentnim vremenima u okviru svog upravljačkog tima moraju imati i strukture koje upravljaju procesima i promenama koji te promene prate. Uz promene u organizaciju potrebno je menjati i ljude zaposlene u istoj kao i uspostavljati odnose koji deluju inovativno i efikasno. Najvažnija promena je menjati se u skladu sa promenama koje diktira okruženje da bi bili efikasni i efektivni u koraku sa modernim vremenom.

Organizacija će rasti i biti uspešna ukoliko se suočava sa promenama. Da bi našla odgovor na tržišno okruženje potrebno je da inicira promene. Sredstvo za uvođenje promena su projekti. Njima se završavaju poslovi koji nisu deo svakodnevnih aktivnosti i oni su ključni za određenu

organizaciju i njenu budućnost. Ono što je najvažnije jeste odrediti, odabrati i na efikasan način ostvariti prave projekte.

Najvažniji deo ovog procesa su menadžeri. Organizacija zavisi od njih od momenta šta će biti urađeno, preko odabira i ostvarivanja projekta koji će doneti korist veću od planirane i gde će stečena iskustva biti prihvaćena. Od menadžera projekta zavisi da li će promena da postane korisno oružje.

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HUMAN RESOURCE MANAGEMENT & DEVELOPMENT (HRM-HRD) AND ADMINISTRATIVE CAPACITY IN THE PUBLIC SECTOR: INTERNATIONAL TRENDS AND STAKES

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Abstract:⁹⁰ *The paper focuses on the role of HRM and (mainly) HRD in Public Administration. It emphasizes the current international trends concerning civil servants' capacity building-reskilling and the role of the above mentioned in the administrative capacity and subsequently in the development of effective daily practice in Public Administration (PA). It initially raises definitional issues concerning the relationship among governance quality, public sector efficiency, HRM and HRD and capacity building in PA, taking into account cross country analysis and comparative studies' findings. It focuses on the Competency Management (CM), in order to present and analyze the new trends towards the competence-based HRM & HRD approach (within the context of NPM), which is developing worldwide, due to the transition from the rather legalistic administrative tradition ending in the "classical career model" to more flexible modes of administration responding to the increased complexity of institutions and ending in "hybrid" (in terms of Demmke, Henökl, and Moilanen) models and patterns of HR Systems in PA. Within this context, it synthesizes the requirements and determinants of this approach. Issues of centralization/decentralization, training modularization and impact assessment, training plans' development, capacity building's relation to the overlapping perspectives in Public Administration are raised and analyzed.*

Keywords: *Public Sector Capacity, HRD, Competency Framework, Public Administration, Civil Servants' competence-based capacity building*

1. Preliminary remarks.

Issues of civil servants' capacity building and reskilling are of vital importance for an effective Public Administration (PA). Emphasis is gradually laid on civil servants' training. According to F. Cardona (2009), one of the main common characteristics of civil service in EU Member States is that "predictable career paths exist and civil servants receive appropriate training during their career" (Cardona, 2009: 2). Public Administration (PA) and subsequently public organizations "are professional organizations providing public services. These public services are multiple (they must do justice to different values) and are rendered in co-production (in cooperation with third parties)" (Bruijn, 2002: 3). Undoubtedly, good and

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⁹⁰ The present paper is mainly based in the following, which is further developing and arranging:

- Papadakis, N. (2018), "Capacity Building and Human Resource Development (HRD) in Public Administration: International Trends and Challenges", Invited Lecture at the *School of Public Administration of the Zhengzhou University (ZZU)*. Zhengzhou, China: 15 June 2018.
- Papadakis, N. (2015), Human Resource Development within Public Administration: Civil Servants' Capacity Building-Reskilling towards an Ethical Behavior and an Effective Daily Practice in PA, in *Asian Journal of Humanities and Social Sciences*, Volume 3, Issue-3, December 2015, pp. 502- 514

effective governance is directly aligned with efficient and effective patterns of HRM and HRD. Administrative reforms' success is related (even more depended on) the human resource policy, for the Public Administration Human Resources are any reform's potential mainstreamers. Quality and effectiveness of Human Resource Development (HRD) is a critical determinant for viable structural and institutional changes.

Given the critical role of the degree of (de)centralization of HR systems to national HR policies and reforms and their overall relation to governmentality, the key question arising is how a capacity-building framework could contribute to ethical behavior and effective daily practice in PA. Even though there is a clear tendency, internationally, towards the shift from the old PA approach-paradigm (the more bureaucratic one) to a new one, based on NPM (New Public Management), Public Administration Reform (PAR) is "not a simple story" (see Demmke et al., 2008: 16). Modernization of PA as such is quite an ambiguous notion, since "much depends on which meaning of "modernization" is at issue" (Hood, 1998: 195). Taking that into consideration, we should focus on what PA capacity is and what it consists of. Via a cross-country analysis, Hwang and Akdede (2011) traced a "*positive relationship between a country's governance quality and public sector efficiency in policy areas of administration, infrastructure, and stability*" (Hwang and Akdede, 2011: 738).

According to Charles Polidano (2000), Public Sector Capacity is the combination of three substantial elements:

- "policy capacity (the ability to structure the decision-making process, coordinate it throughout government, and feed informed analysis into it),
- ...implementation authority (the ability to carry out decisions and enforce rules, within the public sector itself and the wider society).
- Operational efficiency, referring to the cost-effectiveness of the internal operations of the public sector and the quality of the services it provides to the public" (Polidano, 2000: 810).

Capacity building towards Public Sector Capacity is of vital importance within the abovementioned context. In addition, it cannot ignore either the fact that Public Organizations are Learning Organizations. They "*create knowledge on their own or as part of a network of similar organizations but they can also use knowledge created by consultants or academic researchers*" (Van Helden et al., 2010: 83-84), or the active and substantial relationship between institutional building and capacity building. This awareness calls for attention in the the management of civil service reforms. This precise management process "*requires a balance between stability and adaptability or, in other words, a sound combination of job security and internal mobility around administrative settings, a traditional feature of career-based systems. It is more difficult to find such a combination in traditional position-based systems* (OECD & EU/SIGMA, 2010: 7). Within this context, upgrading the skill profile of civil servants has a critical role to play in rejuvenating public administrations (OECD & EU/SIGMA, 2010: 6).

A comparative study of the UNDP/RCPAR (2011) on the "Economic Crisis Responses from a Governance Perspective in Eastern Europe and Central Asia", concludes in that "*institutional capacities in the public sector and civil service professionalism must be strengthened in order to provide the support governments require in crises such as this*" (UNDP/RCPAR, 2011: 28). This is even more important in cases such as the one of Kazakhstan, where the role of the State has been increased aligned with the strengthening of the regulatory framework and the increase of social spending (aiming at supporting the anti-crisis plan), within the economic crisis period (see UNDP/RCPAR, 2011: 4, 7, 9, 26).

2. HRD IN PUBLIC ADMINISTRATION: THE TREND TOWARDS COMPETENCE-BASED CAPACITY BUILDING IN PUBLIC ADMINISTRATION

Institutional capacity is substantially aligned with human resource development and capacity building, since “*the practice of HRD is about agency in a pluralistic, relativistic and interpretative world*” (Lee, 2004: 21). We should take into account, at this point, that the development of effective training systems of civil servants is one of the five key determinants of the administrative capacity as such (see Adomonis, 2009: 3). HRD in PA should be based on and further enhance the four administrative principles that “...*are widely recognized as of fundamental value for building modern public administrations and professional civil services... (namely)... a) Rule of law, ... b) Openness and transparency, ... c) Accountability, ... d) Efficiency and effectiveness*” (Cardona, 2009: 1-2).

According to EU 2020 strategy the objective regarding competences⁹¹ is “*a more productive and efficient pattern of human resources’ up-dating of job-related skills combined with the development of new competences in order to be able to adapt to changes*” (Papadakis, 2010). At the end of 2006, the European Parliament and the Council adopted a European Framework for Key Competences for Lifelong Learning (see European Parliament and Council of the European Union, 2006: 11-18). The competence approach in learning and training, within the new LLL paradigm, “*does not replace educational content. It is a way of working which deepens learners’ capacity to apply knowledge in meaningful situations in their daily and working lives. Most or even all of the key competences can be developed in most or all areas of any traditional curriculum. Developing competence occurs not only through the medium of educational content, but also, through the methodologies devised to address that content*” (E.C. KCs Cluster, Prague PLA, 2009). At this point it is worth mentioning some of the major stakes concerning civil servants’ capacity building and reskilling, which could be summarized as follows:

- ✓ The achievement of a targeted Capacity building framework, in order to facilitate the transition from traditional performance and career systems to more objective- based ones.
- ✓ The training outcomes’ contribution to the reform of the existing qualifications and job profiles, in order to make the learning outcomes and the skills developed fit the Public Administration needs.
- ✓ Improvement of the civil servants’ career prospects and satisfaction at work, to relieve the labour shortages and to raise the performance and efficiency rates.
- ✓ Increase of the social partners’ participation in tripartite agencies/councils entrusted with the development of human resources (see analytically Moustakatou, 2008).

Regarding trends in HRM and HRD within PA, a UNDP/RCPAR (2010) comparative study in 10 different countries in the region of Central and Eastern Europe, titled “Challenges for Public Sector Human Resources Management in the Recent Economic Downturn”, has highlighted several common trends concerning HRM and HRD in PA, including significant changes in the the level of politicization of the civil service, low levels of decentralization of policy planning in the field of HRM, low impact of the social partners (even though they are “*have in many cases been more active during the crisis*”), low integration of research data in HRM policy planning (thus, lack of evidence-based approach), under-development of “*the culture and practice of communication... both internally in the public sector, between management and*

⁹¹ A competence “*is more than just knowledge and skills. It involves the ability to meet complex demands, by drawing on and mobilizing psychosocial resources (including skills and attitudes) in a particular context*” (OECD, 2005: 4).

staff, and externally, towards the public”, lack of significant innovation in HRM (UNDP/RCPAR-Vintisa, 2010: 34). On the other hand, remarkable developments towards the modernization of HRD and training in PA are taking place in transition countries. I.e, in the case of the Republic of Kazakhstan, a comparative study conducted by N. Papadakis and N. Rava for the Academy of Public Administration of the Republic of Kazakhstan, titled “*Comparative Review on International Trends. Recommendations for Capacity Building for the Academy of Public Administration of Kazakhstan*” (2012), ascertained that: “i. *The objectives of the retraining and advance training of civil servants derive from broader strategic documents (such as the Strategy 2030) as well as from the recent Conception of the Academy for Public Administration. Overall, there is a general intention to ensure new competencies (knowledge, skills, abilities, behavior) of civil servants across administrative levels and sectors for dealing with more complex and demanding tasks in the context of systemic transformation and development in Kazakhstan. Retraining and advance training is understood as an integral part of the work of civil servants and is considered as a main precondition for institutional performance.* ii. *The approach is very systemic and all-encompassing – namely, there are well elaborated and learning-intensive programmes which target the whole of the civil service.* iii. *There are specific requirements in both the Law on Civil Service, Rules of retraining and advance training of civil servants and related normative acts which provide a solid.... Framework for retraining and advance training*” (Papadakis & Rava, 2012: 16). It is evident that the Academy of Public Administration of the Republic of Kazakhstan moves in the right path. The impact of the mega project, titled “Civil Service Reform and Modernisation of the Government of Kazakhstan (CSR)” was very positive, as well as constructive, enhancing the capacity of the Academy and further enabling it to cope with the challenges, set by the overall Civil Service Reform.

In terms of competences’ needs identification & forecasting, existing new models and trends on skills’ and point out that the needs-in skills assessment is essential for an effective HRD and training. Early identification of skill needs (aligned with CEDEFOP’s SKILLNET approach to skills development – see CEDEFOP 2006) to provide the ability to investigate: a) whether new skills required are durable or not; b) whether they cover a broad field the public agency; c) whether the Agency itself requires completely new skills, further development or enhancement of existing skills or a combination of different skills. Moreover, anticipation of skill needs refers to forecasting skill needs (i.e. the expected future tasks and domains in the Public administration, and “their particular skill or qualification requirements”- CEDEFOP 2008:3). Skills’ forecasts “are carried out in several countries at national or regional levels or both (focusing on different levels- domains of the economy and the labor market, including the public sector). They are mostly based on macroeconomic projections of sectoral production, productivity and employment (jobs), broken down by occupations and/or skills/qualifications, using advanced methodologies. Often several variants or scenarios are calculated, which – based on alternative assumptions – provide a range of the number of future jobs and their particular skill requirements” (CEDEFOP 2008: 3).

All the above mentioned document that future-oriented policies should be based on the following recommended seminal steps: a) defining and validating skills, knowledge and competences, b) implementing them in curricula, training regulations, qualification standards, c) using them for vocational guidance of the civil servants and d) involving policy-makers, social partners, public administration staff, practitioners and researchers in the discussion of research methods and civil servants’ training outcomes.

3. CURRENT TRENDS AND STAKES CONCERNING HRD IN PA.

3.1 THE CASE OF THE COMPETENCY FRAMEWORK

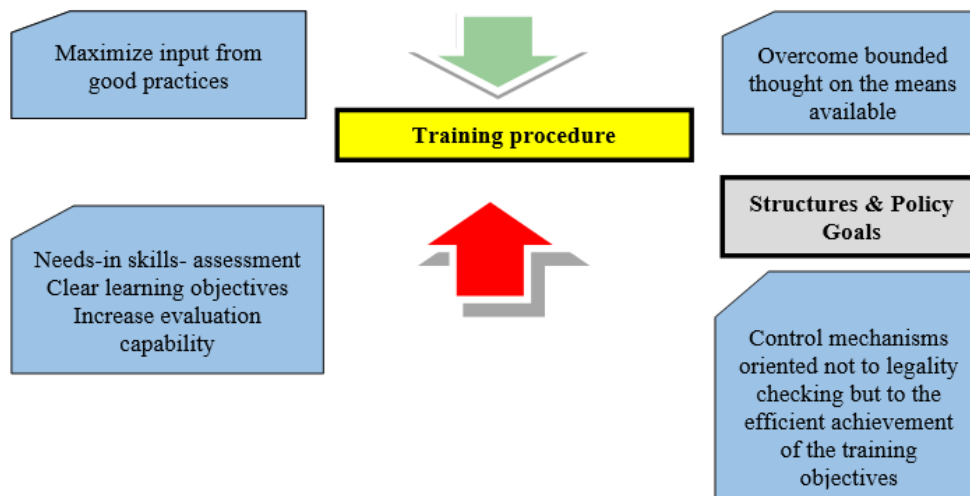
Competency Management (CM) is gradually becoming an international trend in Public Administration, at a worldwide level. CM was originated in the 80s in the private sector of the US and the UK and got introduced in the public sector (mostly position systems) since the early 90s (see Bossaert, 2010: 3). Its role was highlighted, during the 00's, for CM was correlated to the general EU trend towards LLL and Key-Competences based learning and work. The general trend is in front of the transition from the status-based management to management based on performance, competencies, target-setting such as is the case in the private sector (see Bossaert, 2010: 3). A Competency Framework is correlated with the development of a culture of common government and corporate identity (see Limbach-Pirn, 2010: 6). The focal point of the competence- based approach on HR is the extent of target group's commitment (see Limbach-Pirn, 2010: 6).

Within the context of “performance and strategic management”, a competence-based HRM & HRD approach is developing worldwide (Bossaert, 2010: 3). This international trend is not developing in a restraints-free context. At 2010 and 2011, the UNDP/ RCPAR conducted (in close cooperation with members of the Western Balkans Community of Practitioners), a research ending in a report, titled “The use of competencies in job design and recruitment” (see Rava, 2011a). Among the other findings there are several ones related to the restraints against competence- based HRM & HRD at least in the case of the Western Balkans. Such constraints can be summarized as follows: *Low degree of internalization and sophistication/ Deficits in terms of understanding the use of competency/ Lack of performance orientation/ Prevailing legalistic approach/ Reforms may be centralized but not transformative and comprehensive (formal qualifications still dominant; job descriptions still broad and not operationalized etc.)/ Lack of assessment tools (evidence)”* (Rava, 2010: 7, see analytically Rava, 2011a: 13 & 31- 32 and Rava, 2011b: 11 & 33, as well). These types of restraints, forming a reform- resistant context, are not equally met in every national case. Hence, several of them are still present in many different cases and prevent (even undermine) effective policy implementation in HRM and HRD.

3.2 KEY DETERMINANTS OF A COMPETENCE-BASED APPROACH IN HRD.

In order to tackle with the effects of the legalistic administrative traditions or trends, a competence- based HRD and subsequently training perspective should focus on the establishment of concrete criteria to choose among options in the PA daily life-efficiency and flexibility. Therefore:

Figure 1: Substantial Determinants of an Effective HRD in Public Administration



Source: Papadakis & Pechlivanides, 2010: 16.

Given the abovementioned, the major determinants of the paradigm shift requested towards a competence- based HRD in PA are the following:

- ✓ To define the problem space (definitional issues), develop a mutual zone of understanding and operationalize the new conceptual framework.
- ✓ To define:
 - the strategy,
 - the model,
 - the correlation between the implementation and the exact target-group.
- ✓ To correlate from the very first step (recruitment process) Human Recourses Management & Development with both job profiles and career paths (taking into consideration the relevant career system indicators).

As highlighted by an EIPA survey on Civil servants' career system indicators and performance in different administration traditions, competences are related both to HR management and civil servants' performance (see EIPA, 2007 cited in Prohl, 2008). According to EIPA (2009) there are certain strengths and weaknesses at both decentralized and centralized approaches to HRM & HRD (see Bossaert, 2010: 10 & 18). In fact, what is at actual stake is the effective check-n-balances between a) the two abovementioned approaches and b) broader issues. National cases provide food for thought, best practices as well. I.e. the Estonian approach in competence development and assessment is a quite innovative one, combining innovative competences' assessment tools with workshops and targeted training programmes, as well as individual feedback meetings with superiors, in a rotation-driven perspective (see analytically The Estonian Government-Office proposed Flow Chart on Competences development & assessment cited in Limbach-Pirn, 2010: 9 & 11). Belgium, implementing CM as well, emphasizes competences' analytical Clustering, integrated in the broader CM context of HRM & HRD in PA (see analytically EIPA 2009 cited in Bossaert, 2010: 13).

There are several typologies of Civil Servants' Competences that could end in a contextually embedded CM via clustering. Two are the most usual ones. Both are tripartite: a) Generic/ Specific/ Horizontal and b) Core organizational/ generic behavioral/ technical-functional.

4. TOWARDS A COMPREHENSIVE METHODOLOGICAL STRATEGY FOR COMPETENCE- BASED TRAINING OF CIVIL SERVANTS

The challenges rising from the operational interface between HRM and HRD, could be clustered as following (see Papadakis & Pechlivanidis, 2010: 23 as well):

a) Generic

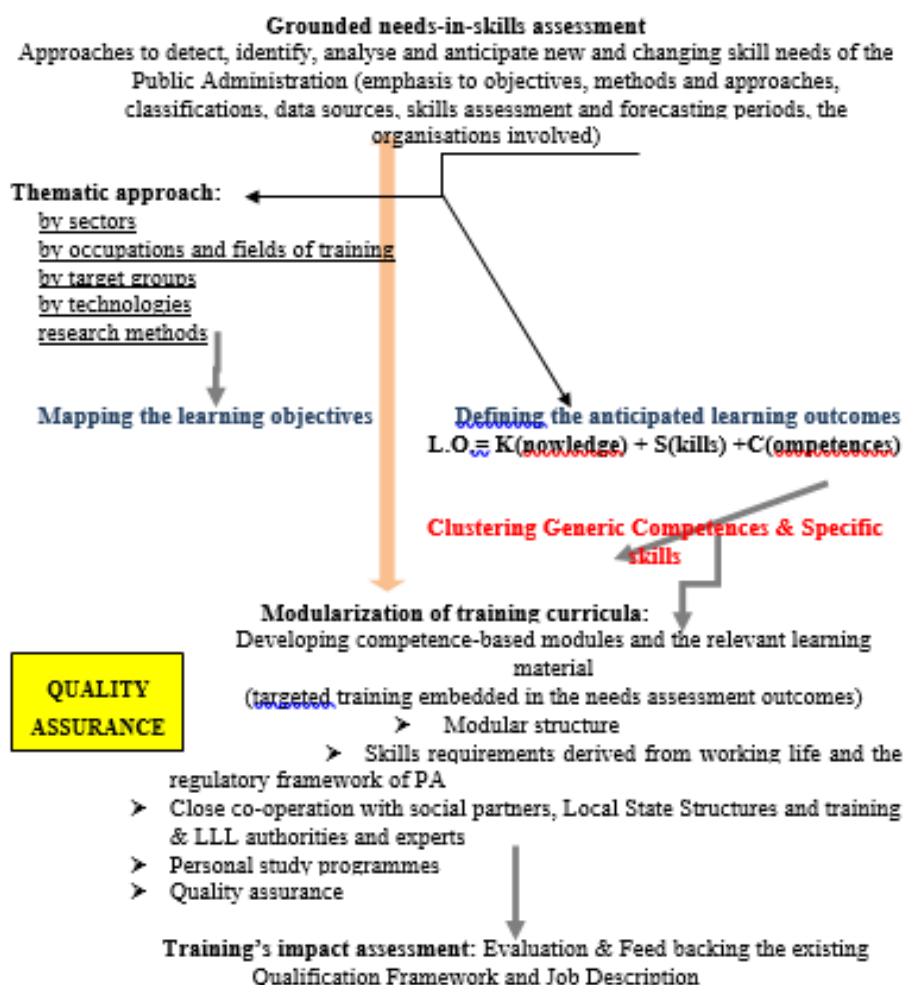
- Mixture of centralization and decentralization (based on good governance & better regulation principles).
- Creation of a transparency (see Rava, 2011a: 25) & evaluation culture combined with culture of LLL in civil service.
- Awareness of the need for a culture of contextually-embedded governmentality.
- Development of a “mutual zone of understanding” (“common language”) among the top executives, the different types and levels of personnel, the social partners, the stakeholders and the State on competences and Human resources in order to facilitate their application and implementation at legal, administrative, operational and practical level.

b) Specific

- Use Competency Frameworks and Operational Assessment Tools for the personnel, in order to increase the individual added values and the organizational capacity (see Rava, 2011a: 8, 9, 11, 22, 31 and Rava, 2011b: 28).
- Develop HR linkages with the real organizational goals, culture and structure (linking job profiles of CM and both of them to generic organizational goals- see Bossaert, 2010: 23).
- Determine the competences-verification level and set-up professional HR departments (see Bossaert, 2010: 23).
- Promote patterns and techniques capable to make horizontal implementation systems, vertical enough to work efficiently (i.e. implement pilot projects on HRM & HRD issues and facets before proceed in overall implementation- see Bossaert, 2010: 23).
- Enhance executives’ commitment and involve stakeholders (and their know-how) in all the abovementioned tasks.

Taken all the abovementioned into account, we can attempt to develop a methodological strategy, aiming at the development of a Competence-based HRD & Training in the public sector.

Figure 2: A competence-based HRD framework (see additionally Papadakis, 2008: 23 and Papadakis, 2010: 17)



It becomes crystal clear that such an approach requires a Needs-in-Skills & Competences Assessment. Its aim is to identify the main deficiencies in knowledge and skills that inhibit the development of administrative capacity and legalize administrative burden while simultaneously they might undermine a prospective administrative reform. Flexibility in “training needs’ scanning mechanisms” is of vital importance (see Moustakatou, 2008: 2). Defining and even more measuring the educational- training needs of the target group (in the public administration Unit where the training intervention is designed for) enables the new training programmes (based on specific training plans- as explained in the next chapter) to adapt to actual needs as well as to changes in the broader context (i.e. policy improvement, simplification of the procedures, better regulation etc.). Within this context, a *Step by step Development of Training Plans*, includes the following (see analytically Papadakis & Pechlivanides, 2010 31 & 33):

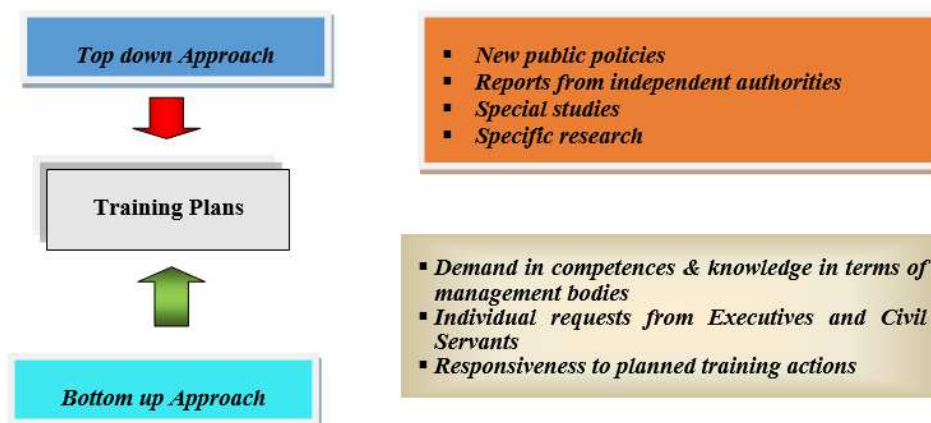
1. Defining a Training Plan (TP): An organized, multi-dimensional re-skilling framework, the set of the required training actions for an Entity of the public administration within a specific time horizon, which occurs as a result (output) of the identification of its training needs, in order to compensate for the lack of knowledge,

attitudes and skills of the human resources, so that it can meet its actual and future operational requirements of the Entity.

2. Developing a TP: TPs should a) include measurable *indicators* at the level of the objectives of human resources development and of their achievement, b) be associated with a *particular timeframe* in which they might need updating – reviewing and c) have sufficient documentation as to *why* each training action provided is necessary, what either specific or generic competence and *whom* it concerns (see Papadakis & Pechlivanides, 2010: 31).
3. Facilitating the implementation of a training plan: Modulization of training, use of e-learning, individual training passport, accreditation process ending in certifications and ex-ante evaluation of the training process can significantly contribute (see analytically Papadakis & Pechlivanides, 2010 and Moustakatou, 2008: 11).

Training plans’ development requires a holistic and balanced approach to training. A bottom up feedback is required, **while** the public policy complex, the existing regulatory framework, the general training paths and the State priorities on Public Administration ensure the check and balances on the training procedure, providing Civil Servants’ Training Institutes and Units with the necessary top-down institutional knowledge, **in order** the combination between bottom up and top down to provide the HRD Units and Training Organizations **with the requested middle out approach to civil servants reskilling.**

Figure 3: Tools & Determinants for Each Approach-Towards the Middle-Out Outcome



Source: Papadakis & Pechlivanides, 2010: 33.

5. DISCUSSION AND CONCLUSIONS: ON THE CAREER/ POSITION DIVIDE AND THE STAKE OF AN EFFECTIVE AND ETHICAL BEHAVIOR IN PA

As Demmke, Henökl and Moilanen point out “at the beginning of the 21st century, (there is) no longer a civil service model that could be described as a ‘classical career model’. Today, pure career or position models simply no longer exist. Instead of clear-cut categories, there seems to be a trend towards hybrid systems that combine elements of both pure systems” (Demmke, Henökl, and Moilanen, 2008: 10). The classification of the EU Countries’ HR systems in PA, “using a 60% mark of all career-system indicators in order to draw the line between career-based and position-based systems” (Demmke, Henökl, and Moilanen, 2008: 10), ended in the finding that the vast majority of EU countries have rather career-based HR

systems. Just 10 out of the 27⁹² tend towards a position-based system (see Demmke, Henökl, and Moilanen, 2008: 11). The career/ position divide is related to the transition from the traditional approach in HR to the modern era of PA. The (traditional) perception of civil servants as agents, supposed to uphold the Rule of the Law in order to implement public policies.

That was the main hypothesis for many decades, substantially affecting the perception of ethical behavior, namely as a “*result of specific organisational features*” (Demmke, Henökl and Moilanen, 2008: 23). That choice had a certain impact on HR systems, resulting in quite hierarchical and centralized organizational structure, while “*clear and rigid career paths, lifetime tenure, seniority, etc were introduced in order to reduce as far as possible the danger of too much political influence, corruption, misconduct, the exercise of private interests and instability of government*” (Demmke, Henökl and Moilanen, 2008: 23). Is that enough to prevent corruption and ensure an effective and ethical behaviour in PA and civil service? Let us take into consideration that civil servants are primarily “managers” rather than “executors”, operating in a multi-tasking way within the context of working for the common good-public interest. In our times, things have changed: “*Public servants are more accessible, more transparent, accountable and assume more responsibilities than ever before*” (Demmke, Henökl, and Moilanen, 2008: 23). This is undoubtedly a chance and a challenge towards the promotion and enhancement of ethical behaviour in daily practice. According to Merton, there is a strong connection between organizational structures in PA and behaviour (Merton, 1987: 112). In fact behaviour was considered directly influenced by the organizational structures. But later on, several researchers put the traditional view of the typical bureaucrat into question (see Allinson, 1984. It is obvious that, contrary to Merton’s perception, the traditional bureaucrat is out of the (rapidly change) PA context.

In order to take advantage of that “window of opportunity” and use efficiently the (already analyzed in this paper) new trends and tools in HRM and capacity building, aiming at further promoting- building an ethical and effective behavior in PA, we have to contextualize these objectives in their broader context of values and objectives in PA.

Table 1: Key objectives and civil servants’ values. A taxonomy

| KEY OBJECTIVES | CIVIL SERVICE VALUES |
|-----------------------------|----------------------------------|
| goal achievement | fair and standardized treatment, |
| fulfillment of duties | neutrality |
| working for the common good | stability |
| | hierarchy & impartiality |
| NEW OBJECTIVES | |
| flexibility & innovation | morality & ethical standards |

Civil servants ex definitio serve the public good-interest and subsequently exercise important societal functions, while “they appear to be catalysts for the building of social capital in society at large” (Brewer, 2003: 5), since their behavior and performance affects the public/ citizens’ trust to the institutions. Such tasks require ethical behavior and integrity as a consitute a conditio sine qua non, while they raise public/ citizens’ expectations on civil servants’ behavior, performance and operation. This expectation depends not just from the code of practice/ ethics. Integrity cannot be taken for granted. Ethics is always a complicated and multiparametric issue, influenced by many factors (such as type of work, motivation, organizational culture,

⁹² The research was conducted before Croatia entering-accessing the EU.

personality, trust and social capital, civic attitudes etc.). In fact it requires the constant development of the relevant competences and skills.

An HRD framework aiming at capacity building and competences' development against corruption and towards ethical behaviour, making rational use of the already analyzed notions, trends and tools (CM, competence-based training, modularization of training curricula and training plans, needs-in-skills assessment, etc.) can provide such a balance. Within this a context, such a capacity building can support and facilitate institutional building, while increasing the overall Public Sector (Administrative) Capacity. Let us not forget that in nowadays a better balance is needed between rules and standards on the one hand and contextually- embed flexibility on the other.

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HUMAN RESOURCE MANAGEMENT IN THE CENTERS FOR DEVELOPMENT OF THE PLANNING REGIONS IN THE REPUBLIC OF MACEDONIA

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Abstract: *The centers for development of the eight planning regions have been established under the Law on Balanced Regional Development which was adopted in 2007 with the main goal to strengthen the capacity of networks and stimulating the development on regional level. In order to achieve effective and efficient operation of the centers, the management of human resources in these organizations becomes a matter of high priority because human resources are the agents of the important developmental activities in the region. This paper explores human resource management policies and practices that are adopted in the centers aiming to improve the capacity and competences of the employees, and enable them to perform effectively. Using qualitative research strategy, inductive content analysis of the documents was apply, and semi-structured interviews were conducted with eight executive directors who represent and manage the centers. Research results reveal the need for improvement in the way that human resources are managed and lack of appropriate financial support from local and national authorities and institutions. Also, the findings point to the need of increasing the number of employees in the centers, considering the scope of work and the real opportunities to apply for more developmental projects that are financially supported by the EU pre-accession funds as well as available funds of other foreign and international organizations and donors.*

Keywords: *Human resource management practices, employee competencies, centers for development of the planning regions, qualitative study.*

1. INTRODUCTION

The centres for development of the planning regions are part of the integral institutional framework on regional development in the Republic of Macedonia. In addition to the Bureau for Regional Development and the local self-government units, the centres are among the main conveyors of the planning and implementation of the region development program.

After the Law on Balanced Regional Development [1] was adopted in May 2007, during 2008 and 2009 the municipalities commenced the establishment of the centres in the eight planning regions in Macedonia. The Decisions of Incorporation regulate their competences, obligations and responsibilities. The centres act as professional and administrative-technical bodies to the councils of the eight regions. As operating bodies, their responsibility is to prepare and implement planning documents and related region development action plans. Their tasks include preparing and submitting project applications; project implementation; public procurement required for the realization of the project activities; providing professional and technical assistance to the local self-government units; cooperation with the business sector and

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the non-governmental organizations in the preparation of development projects for all concerned parties.

The necessity for building the centres' institutional and human resource (HR) capacities as a requirement for achieving more intensive regional development was determined with the 2009-2019 Strategy on Regional Development of the Republic of Macedonia, Strategic Goal 2, and Priority 2.7. "Enhancing the planning and realization capacities for the development of the planning regions," [2] with an accent on the need for a systematic approach toward:

- Building the centres' capacities;
- Appropriate quantitative and qualitative staffing of the centres;
- Continuous improvement of HR through training.

The Strategy on Regional Development of the Republic of Macedonia was adopted in 2009, covering the period until 2019. Considering the 9-year time frame, the following question arises: "How many strategic priorities and measures referring to the centre capacity building are being implemented, and in what manner?"; "What are the weaknesses in the implementation process and future challenges?". Consequently, in this study, the following specific research goals were defined:

- Determining the centres' capacity and potential for expansion;
- Establishing the HR competencies; and
- Building the organizational capacity and competencies.

The empirical research was conducted with the application of a qualitative method. The collection of the primary empirical data was carried out with semi-structured interviews. The managers of all eight centres for development of the planning regions in the Republic of Macedonia were interviewed. In order to obtain additional data, the method of a qualitative (inductive) content analysis was applied. The analysis encompassed documents, laws, strategies, action plans, programs, as well as data from the centres' websites.

2. INSTITUTIONAL CAPACITY AND SIZE OF THE CENTRES

In order to examine the centres' current institutional weaknesses, the respondents were asked the following question: "*How is the institutional capacity of the Centre, the need for professional staff and their profile determined?*"

The organization, work and financing of the centres are determined with the Articles of Incorporation. The centres have the right to employ not more than five full-time employees, with a permanent contract and salaries covered by the Ministry. The five employees are deployed in work positions according to the work requirements, and are the following: head of the centre, project coordinators covering different areas in the regional development and an administrator or advisor for legal matters and public procurement. Each of the centres hosts an additional regional business centre with a temporary contract employee in charge of offering support and consultation services to small and medium-sized enterprises in the region. Expanding the centres with an additional employee proved to be a positive step in the capacity building of the centres. However, experiences from some centres reveal that a temporary contract employment simultaneously creates, on the one hand, lack of job security, and on the other hand, unstable income due to the late payments from the Ministry competent to provide the employee's salary.

Due to the nature of working with projects and the changing scope of activities, the centres are given the opportunity of employing temporarily engaged workers, provided the centre itself is able to secure the salary. Building HR capacities with additional work force by temporarily employing staff is a frequent practice. The compensation for these employees is provided from the projects' budget or the centre's finances. Towards providing the necessary HR capacity for the long-term, there is a tendency to offer permanent contracts of such employees once their temporary engagement expires due to the knowledge, skills and abilities as well as experience they have gained by working on projects (for instance the Centre for Development of the Vardar Planning Region). The heads of the centres should recognize the importance of retaining employees to the overall performance results of the centres. Such a HRM practice is justified from at least two aspects: firstly, this profile of workers ranks highly on the labour market in Macedonia and is scarce, and secondly, considering the time and means invested in qualifying such staff, additional investment in orientation and training is quite insignificant and would burden the centre less financially since this employees have already been qualified to work on such work positions. This HR practice should be adopted, particularly for workers who, despite possessing the key competences, have also already been introduced with the working organization and fit well in the organizational culture.

Regarding the size of the centres⁹⁴ and how much it corresponds with the current working requirements, opinions among the heads of the centres differ. The Head of the Centre for Development of the Skopje Planning Region believes that the current level of staff satisfies the centre's needs. The Centre for Development of the Pelagonia Planning Region reports that *"generally, the current number of employees work efficiently, however considering the importance of the centres and their role in the regional development, the institutional and staffing capacity should be increased."* However, on the other hand, some of the heads of the centres emphasize that the current number of employees fails to satisfy the needs for efficient and effective working in increased work load periods (for instance, the Centre for Development of the Southeast Planning Region worked simultaneously on eleven projects at one time).

The idea for enlarging the centres by introducing new work positions is related with the expected increase of the development projects' budget on a national level. This would result with increased work load at the centres, which, in turn, would be unable to efficiently and effectively respond to the new work responsibilities and tasks with the current organizational and staff capacities.

The increase of staff members might be justified, however it should not result with unnecessary and unjustified investment and additional strain to the state and the municipal budget, in circumstances of "... widely accepted perception that the public service system provides a safe haven for lazy and incompetent employees..." [3]. New, unproductive employment and the accumulation of public servants could create overemployment and their potential incompetency could expose the centres to additional expenses for education and training, and furthermore, it might create an additional barrier to the organizational flexibility and efficiency of the working system. Consequently, the requests for expanding and reinforcing the centres with new employees should be generally based on: 1) future projections on the work volume, content and scope at the centres; 2) a valid analysis and assessment of the future work force requirements pursuant the projections and 3) strong justification for each new work position. Employee selection should consistently and rigorously follow the principles of expertise and competency for every work position.

⁹⁴ The number of employees is used as an indicator of the organization's size.

3. EMPLOYEE COMPETENCIES

The term employee competencies denotes the employee's capability to perform their job, hence competent employees are those who meet their work position requirements. The concept of competencies refers to the knowledge, skills and abilities that increase the employees' working performance and productivity and are important factors for the organizational success [3], [4]. Maximum level of performance is achieved when the person's capability or talent is consistent with the needs of the job demands and the organizational environment. Boyatzis suggests three threshold clusters of competencies: 1) expertise and experience; 2) knowledge and 3) basic cognitive competencies. Additionally, he identifies three clusters of competencies as important factors for individual performance [4]:

- Cognitive competencies (systems thinking and pattern recognition);
- Emotional intelligence competencies (self-awareness; self-management competencies which include emotional self-awareness and emotional self-control);
- Social intelligence competencies (social awareness and relationship management competencies, such as empathy and teamwork).

In order to examine the level of competencies required to perform the tasks, the interviewed heads of the centres were asked to answer the following question and explain: *“To what degree do HR capacities satisfy the demands for efficient and effective work of the Centre? List which competencies do the employees possess and which are the competencies missing?”*

According to the act on systematization of work positions at the centres, the head and coordinators are required to have a higher education degree, without specifying the study field. Employees at the centres have different higher educational profiles and tasks are distributed equally among the employees qualified to perform several different ones. The head of the Centre for Development of the Southeast Planning Region thinks that: *“In addition to a faculty degree, which is mandatory, trainings and working experience are also important for working on projects. Professional improvement is in fact necessary, completed higher education is not sufficient.”* In this centre, the head explained the HR practices of work organization by stating the following: *“Employees are appointed to work assignments according to the areas required by the project and in accordance with their education, experience, but also the employees' affinities.”* The head knows the employee that would be the most productive for a certain task and the employees are guided towards tasks for which they are experienced. In most centres, the tasks are performed efficiently and head of the Centre for Development of the Southeast Planning Region stressed that: *“employees are qualified to prepare project applications and, more importantly, for the implementation of projects where work is more difficult due to the numerous problems they face during the implementation”*. Job-specific knowledge and skills are gained with experience and on-the-job training by more experienced colleagues. Regarding the lack of competencies, several of the centres stressed the need of employing an economist (accountant). Moreover, the heads inform that the infrastructural projects, of priority for the regions, impose the need of a civil engineer. The lack of such staff at the Centre for Development of the East Planning Region is dealt with by hiring engineers from the municipalities: *“infrastructural projects are mostly done by signing a cooperation contract with the municipalities, which results with exploiting the municipality's human resources. We usually ask the mayor for a civil engineer employed at the municipality, who is then hired at the centre, for the requirements of internal construction monitoring in order to prevent monitoring linked somehow to the contractor.”*

In addition to the mentioned professional and technical competencies, the centres also lack organizational knowledge, skills and abilities, among which strategic management. Such competencies are particularly important for the management staff (heads, supervisors, coordinators etc.), [3]. These are listed below in Table 1.

Table 1: Competencies of employed civil servants

| | |
|-------------------------|--------------------------|
| Achievement orientation | Personal effectiveness |
| Analytical thinking | Persuasion |
| Building relationships | Problem resolution |
| Communication | Project management |
| Decision making | Resource management |
| Employee development | Strategic planning |
| Innovation | Teamwork |
| Integrity | Values diversity |
| Performance management | Business system thinking |

To the above-listed competencies, Klingner and Nalbandian also add conflict resolution skills and working in a diverse demographic environment [3]. The heads of the centres articulated the necessity for project cycle management training, stressing as particularly important networking and lobbying training. The listed competencies refer mostly to maintaining the social and psychological surrounding in which the organization's technical core operates. Such social skills, in addition to the employee's knowledge, are an important predictor of job performance.

4. DEALING WITH THE LACK OF PROFESSIONAL, TECHNICAL AND OTHER COMPETENCIES OF THE EMPLOYEES

Public institutions need to respond to current and future challenges by building competencies in the following way: hiring new workers, signing temporary services contracts with organizations or individuals or training the current employees. Any lack of competencies can gravely disturb the work at the centres and decrease their efficiency. On the one hand, the legally prescribed maximum of five employees financed by the competent ministry and the centres' inability to cover the salaries of new employees on their own, often hinders the functioning of the organization. On the other hand, technical and technological innovations bring about changes in the work organization, which require a different type of competencies. Such fluctuating circumstances force the centres to adjust and deal with new challenges on a daily level by applying different work practices. Considering this, the heads of the centres were asked to answer the following question: *“Could you tell us more about the activities for employees capacity building and the implementation of training and development programs?”*.

Employees' competencies building is achieved through training and development processes, which implies identifying, planning and budgeting the training and development needs. The heads of the centres recognize the need for training and the importance of continuous learning, but their answers reveal almost complete lack of investment in trainings and lack of formally adopted training and development program. Instead, trainings are rather ad hoc activities, systematically not planned or projected beforehand. The reason lies in the absence of finances allocated to fund such needs. The only practice reinforced is staff training funded by donors from different projects, i.e. training budget exists only when it is included within the expenses of a specific project or program. The centres regularly allocate finances from their own budget, however, only for the purpose of training activities related to public procurement and archive work. A positive example in HRM is the head of the Centre for Development of the Southeast

Planning Region, whose master's degree in local and regional development provided her with the expertise for working on project applications for EU funds. She is also engaged as a trainer of the municipality staff and a mentor of her own employees within the centre.

The centres need to create a training and development policies and practices that would reflect a strategic HR approach. Their sustainability has to be grounded on maximizing the staff's competencies [5]. Considering the needs for building the competencies of employees, additional efforts are required towards time and financial investment for staff development, such as: designing orientation programs for new employees; on-the job training and off-the-job training; skills development through specialization or other additional education activities in the formal educational system, as well as applying the methods of mentoring and coaching [6], [7].

5. CONCLUSION

The general conclusion is that HRM in public institutions should rely on human resource practices which provide efficient and effective working. The organizational success and overall work performance depend on employee engagement and discretionary effort. The employees are the most productive when they possess competencies, have access to available resources, proper organizational conditions and opportunities for career development.

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- <http://www.skopjeregion.gov.mk/mk/>
- <http://pelagonijaregion.mk/>
- <http://www.rdc.mk/southeastregion/index.php/mk/centarot/za-centarot>

STRATEGIJSKO UPRAVLJANJE LJUDSKIM RESURSIMA UZ PODRŠKU SISTEMA POSLOVNE INTELIGENCIJE

STRATEGIC HUMAN RESOURCES MANAGEMENT WITH SUPPORT OF THE BUSINESS INTELLIGENCE

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Apstrakt: *Kontekst istraživanja bilo kojeg aspekta ljudskih resursa treba uvijek da bude strategijsko upravljanje i upravljanje performansom. Inovacija i razvoj proizvoda, usluga i poslovnih procesa mogu se postići unapređenim znanjima i umjećima zaposlenih, nadmoćnom informacionom tehnologijom i uređenim procesima organizacije. Interesantna su saznanja do kojih se dolazi ovim istraživanjem i preispitivanjem načina upravljanja ljudskih resursa u većim gradovima u Republici Srpskoj. Upravljanje ljudskim resursima u svakom poslovnom sistemu postaje potpuno različito od dosadašnjeg. Nema efikasnog strategijskog upravljanja ljudskim resursima bez podrške informacionih tehnologija i informacionih sistema. Razvoj informacionih tehnologija i informacionih sistema dramatično mijenja upravljanje ljudskim resursima. Strategijska spremnost informacionog kapitala (IT i sistema) je najsmislenija mjera vrijednosti informacionog kapitala organizacije. Najviše se raspoloživost informacionog kapitala u upravljanju ljudskim resursima mjeri nivoom razvijenosti onlajn sistema transakcione obrade, bilo da je riječ o modulu nekog ERP sistema, ili da je riječ o HRIS-u (engl. Human Resources Information Systems). Druga tehnologija, koja ima još veći strategijski značaj, je BI (Business Intelligence) tehnologija i BI sistemi podrške odlučivanja. Poseban izazov je da se ispita stanje i mogućnosti razvoja ljudskih resursa u profitnim i neprofitnim institucijama u Republici Srpskoj. Ovim naučnim radom pokušaće se steći nedostajuće informacije o sadržaju i načinu upravljanja ljudskim resursima, u profitnom i neprofitnom sektoru, posmatranom u kontekstu informacionih sistema.*

Ključne riječi: *Poslovna inteligencija, informacioni sistemi, sistemi za upravljanje ljudskim resursima, HRIS, upravljanje ljudskim resursima*

Abstract: *The context of research on any aspect of human resources should always be strategic management and performance management. Innovation and development of products, services and business processes can be achieved by enhanced knowledge and skills of employees, superior information technology and organized processes of the organization. Interesting knowledge is gained by researching and re-examining how human resources management works in major cities in the Republic of Srpska. Human resource management in every business system becomes completely different from what it has been. There is no efficient strategic management of human resources without the support of information technologies and information systems. The development of information technologies and information systems dramatically changes the management of human resources. The strategic readiness of information capital (IT and systems) is the most meaningful measure of the value of the information capital of the organization. The greatest availability of information capital in human resources management is measured by the level of development of online transaction*

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processing systems, whether it is a module of an ERP system, or that it is HRIS (Human Resources Information Systems). Another technology that has even more strategic significance is BI (Business Intelligence) technology and BI decision support systems. A particular challenge is to examine the state of and opportunities for the development of human resources in profit and non-profit institutions in Republic of Srpska. This scientific work will attempt to obtain the missing information on the content and method of human resources management in the profit and non-profit sector, observed in the context of information systems.

Keywords: *Business intelligence, Information systems, Human resources information systems, HRIS, Human resources management*

UVOD, METODOLOGIJA, HIPOTEZE I CILJEVI ISTRAŽIVANJA

Kontekst istraživanja bilo kojeg aspekta ljudskih resursa treba uvijek da bude strategijsko upravljanje i upravljanje performansom. Inovacija i razvoj proizvoda, usluga i poslovnih procesa mogu se postići unapređenim znanjima i umjećima zaposlenih, nadmoćnom informacionom tehnologijom i uređenim procesima organizacije. U perspektivi učenja i razvoja četiri glavne kategorije su bitne: (a) moći zaposlenih, (b) istraživanje i razvoj, (c) motivisanost i zajedničko pregnuće i (d) moći informacionog sistema. [5], [6].

Ovaj naučni rad se sa stanovišta predmeta istraživanja bavi istraživanjem problema rasprostranjenosti, zastupljenosti modernih procesa upravljanja ljudskim resursima u praksi, podržanih savremenim informacionim tehnologijama i sistemima. Savremene organizacije sve jasnije shvataju da im valjano upravljanje ljudskim resursima može značajno doprinijeti sticanju održivih kompetitivnih prednosti. Značaj konceptata i pristupa upravljanja ljudskim resursima, a prema tome i vrednovanja i ocjenjivanja ljudskog kapitala, sa podrškom informacionih sistema, prema svemu sudeći, zasniva se na tome što zahvaljujući njima biva promijenjeno doskorašnje shvatanje i razumijevanje doprinosa ljudskih resursa performansi organizacije. Jedna od vodilja u izboru istraživačkih pitanja i hipoteza bila je zamisao da se istraživanjem steknu nedostajuće informacije o načinu upravljanja ljudskim resursima u organizacijama u regiji nekoliko gradova u Republici Srpskoj. Problemi istraživanja u ovom empirijskom istraživanju izraženi su skupom istraživačkih pitanja na koja je istraživanje dalo odgovarajuće odgovore. Cilj i generalni inicijalni povod bilo je nastojanje da se stekne ocjena aktuelnog stanja u profitnom i neprofitnom sektoru, odnosno zamisao da se istraživanjem steknu nedostajuće informacije o sadržaju i načinu upravljanja ljudskim resursima, posmatranom u kontekstu informacionih sistema.

Istraživačka pitanja i problemi istraživanja glase: P1: Da li u organizacijama postoji poseban odjel/služba zadužen za upravljanje ljudskim resursima? P2: Da li je i koliko upravljanje ljudskim resursima podržavano informacionim sistemom upravljanja ljudskim resursima?

Cilj empirijskog istraživanja jeste sticanje informacija o načinu upravljanja ljudskim resursima odnosno implementaciji informacionih sistema u tom procesu.

Postavljene su slijedeće istraživačke hipoteze: H1: U skupu organizacija iz kojih je uzet prigodni uzorak nije dovoljno rasprostranjena primjena savremenog upravljanja ljudskim resursima. H2: U skupu organizacija iz kojih je uzet prigodni uzorak nije dovoljno rasprostranjena primjena upravljačkog informacionog sistema ljudskih resursa.

STRATEGIJSKO UPRAVLJANJE LJUDSKIM RESURSIMA

Ako ljudski kapital organizacije nije podešen prema strategiji organizacije, onda izostaje jedan od neophodnih uslova uspješne implementacije strategije [1], [2]. Nema efikasnog strategijskog upravljanja ljudskim resursima bez podrške informacionih tehnologija i informacionih sistema. Razvoj informacionih tehnologija i informacionih sistema dramatično mijenja upravljanje ljudskim resursima; transformiše tradicionalne pristupe u digitalizovane onlajn procese u internet okruženju i vrši podršku svim podprocesima i aktivnostima i obezbjeđuje informacije HR osoblju, operativnom, taktičkom i strategijskom menadžmentu [4]. Dakle, drugi važan kapital organizacije, posmatran u kontekstu strategijskog upravljanja i upravljanja ljudskim resursima, jeste informacioni kapital. Postoji uvjerenje da informacioni kapital (informacioni sistem) treba da bude ocjenjivan i razvijan tako da bude podešen zahtjevima strategije organizacije; odnosno zahtjevima razvoja najznačajnijeg kapitala organizacije, a to su ljudski resursi.

Nema nijedne IT ili vrste informacionog sistema koji ne doprinese upravljanju ljudskim resursima. Neki sistemi to čine u jednom domenu više i bolje, a u drugom manje i slabije, dok drugi sistemi daju sasvim obrnut benefit i uticaj. Najviše se raspoloživost informacionog kapitala u upravljanju ljudskim resursima mjeri nivoom razvijenosti onlajn sistema transakcione obrade, bilo da je riječ o modulu nekog ERP sistema, ili da je riječ o HRIS-u (engl. Human Resources Information Systems). Druga tehnologija, koja ima još veći strategijski značaj, je BI (Business Intelligence) tehnologija i BI sistemi podrške odlučivanja.

SISTEMI POSLOVNE INTELIGENCIJE- ZNAČENJE ULOGA I KONCEPT U KONTEKSTU UPRAVLJANJA LJUDSKIM RESURSIMA

Poslovna inteligencija je veoma široko i multidisciplinarno polje koje sinergijski i složeno kombinuje poslovne procese, ekspertsku znanja, tehnologije i aplikacije da bismo donosili bolje strategijske i taktičke poslovne odluke u HRM.

Poslovna inteligencija omogućava odjeljenjima za upravljanje ljudskim resursima da postanu strateško sredstvo unutar organizacije. Ona kreativno, a i krajnje produktivno, pomaže u jačanju efikasnosti, kako unutar odjeljenja upravljanja ljudskim resursima, tako i u strategijskom domenu organizacije u cjelini, prije svega u donošenju ključnih odluka u vezi sa zapošljavanjem, planiranjem i izradom proračuna za podršku strategijskim ciljevima. Ništa manja uloga poslovne inteligencije nije u podršci donošenja taktičkih i operativnih odluka. Sintetizovani stav o ulozi poslovne inteligencije u procesu upravljanja ljudskim resursima mogao bi se izreći jednom rečenicom – od mnogobrojnih i raznolikih podataka do integrisane informacije. Iz raznovrsnih podataka mogu se derivirati integrisane informacije pomoću odgovarajućih mjerila, analiza, metoda i tehnika poslovne inteligencije [7]. Rješenja poslovne inteligencije mogu omogućiti odjeljenju za upravljanje ljudskim resursima da: (1) podrži njihove odluke, a i drugih menadžera u iznalaženju odgovora koji se tiču strategijskih ciljeva i strategija organizacije, (2) donosi i realizuje neke strategijske odluke koje se tiču konkretno upravljanja ljudskim resursima.

U mnogim slučajevima, podaci o ljudskim resursima su haotični, što dovodi do nesistematičnog zapošljavanja, obuke, učinkovitosti menadžmenta i procesa kompenzacije. Organizacije moraju prikupiti i uskladištiti velike količine podataka o njihovim zaposlenima, kojim treba upravljati i koje treba obrađivati. Volumen takvih podataka iz godine u godinu raste i u velikim organizacijama doseže visok nivo. U prošlosti, skladišta podataka su bila prevashodno

dizajnirana za onlajn analitičke obrade podataka, a ne i za istraživanje. Danas su, međutim, dio DSS poslovne inteligencije Data mining tehnike i zahtjevi pristupa podacima na jednom detaljnijem, dubljem istraživačkom nivou; što obezbjeđuju samo Data mining tehnike za koje se podaci priređuju i DW. Upravljanje informacijama je, pojednostavljeno govoreći, proces (podržan DSS) planiranja, organizovanja, koordinisanja i kontrolisanja aktivnosti: ispitivanja i identifikovanja korisničkih potreba za informacijama, pronalaženja i ocjenjivanja izvora potrebnih informacija, akvizicije informacija, organizovanje i skladištenje podataka neophodnih za procesiranje izvještaja koji će zadovoljiti informacione potrebe korisnika i samih informacija, sintetizovanja informacija u željene informacione proizvode/usluge, obučavanja korisnika za efektivno i efikasno korištenje informacionih proizvoda/usluga i sistema, određivanja najpodesnije vizualizacije i prezentacije informacija, distribucije informacija i adekvatnog korištenja informacija.

DIGITALIZOVANO, SAVREMENO UPRAVLJANJE LJUDSKIM RESURSIMA - PRESJEK STANJA U ORGANIZACIJAMA REGIJE GRADA BANJA LUKA

Struktura, mnoštvo programskih rješenja, funkcionalnosti i svojstava iz perspektive HRM i IT, su transkribovani u istraživačke instrumente i na taj način će biti mjereni i verifikovani u istraživanju prakse organizacionih sistema u nekoliko većih gradova Republike Srpske: Banja Luka, Prijedor, Doboj, Prnjavor i Gradiška. Problemi istraživanja u ovom empirijskom istraživanju izraženi su skupom istraživačkih pitanja i hipoteza na koja je istraživanje dalo odgovarajuće odgovore. Cilj i generalni inicijalni povod bilo je nastojanje da se stekne ocjena aktuelnog stanja u profitnom i neprofitnom sektoru, odnosno zamisao da se istraživanjem steknu nedostajuće informacije o sadržaju i načinu upravljanja ljudskim resursima, posmatranom u kontekstu informacionih sistema.

Istraživačka pitanja i problemi istraživanja glase: **P1:** Da li u organizacijama postoji poseban odjel/služba zadužen za upravljanje ljudskim resursima? **P2:** Da li je i koliko upravljanje ljudskim resursima podržavano informacionim sistemom upravljanja ljudskim resursima? **Cilj empirijskog istraživanja** jeste sticanje informacija o načinu upravljanja ljudskim resursima i implementaciji informacionih sistema u tom procesu.

Postavljene su sljedeće istraživačke hipoteze: **H1:** U skupu organizacija iz kojih je uzet prigodni uzorak nije dovoljno rasprostranjena primjena savremenog upravljanja ljudskim resursima. **H2:** U skupu organizacija iz kojih je uzet prigodni uzorak nije dovoljno rasprostranjena primjena upravljačkog informacionog sistema ljudskih resursa.

Način istraživanja. Populacija i uzorak: Uzorak nije mogao biti slučajan iz više razloga. Organizacije su veoma promjenljive, njihovo okruženje još promjenljivije, nerado podržavaju istraživanja i dosta se teško dolazi do potrebnih podataka. Mnogi nisu voljni da prihvate istraživačku inicijativu i da daju tražene podatke. Stoga se pribjegli prigodnom uzorku organizacija i u ovaj uzorak je ušlo 30 organizacija različitih djelatnosti, profitnog i neprofitnog sektora i različite veličine, koje posluju u gradu Banja Luka, Prijedoru, Doboju, Prnjavoru i Gradiškoj. U cilju pridobijanja što objektivnijih rezultata i realnije slike u nekim organizacijama je ispitano po nekoliko zaposlenih - ispitanika. Presjek stanja primjene pojedinih funkcionalnosti informacionog sistema se radio uzevši u obzir ukupan broj organizacija, a ne samo one koje posjeduju IS, iz razloga pridobijanja podatka o primjeni pojedine funkcionalnosti u odnosu na ukupan broj organizacija. U istraživanju je učestvovalo 67 ispitanika (uzorak ispitanika).

Instrumenti istraživanja: U ovom empirijskom istraživanju korišten je istraživački instrument - ček lista. Ček lista sadrži pitanje o postojanju odjela, službe za HRM i pitanje o postojanju informacionog sistema u organizaciji kao i 16 stavki o funkcionalnostima softvera za podršku upravljanja ljudskim resursima. Ispitanici su odgovorili zaokružujući odgovor 1 (DA) ukoliko softver koji koriste u njihovoj organizaciji ima takvu funkcionalnost, odnosno zaokružujući 0 (NE) ukoliko je nema.

Stavke ček liste:

– *Da li u organizacijama postoji poseban odjel/služba zadužen za upravljanje ljudskim resursima?*

– *Da li organizacija posjeduje informacioni sistem za upravljanje ljudskim resursima?*

Funkcionalnost softvera za:

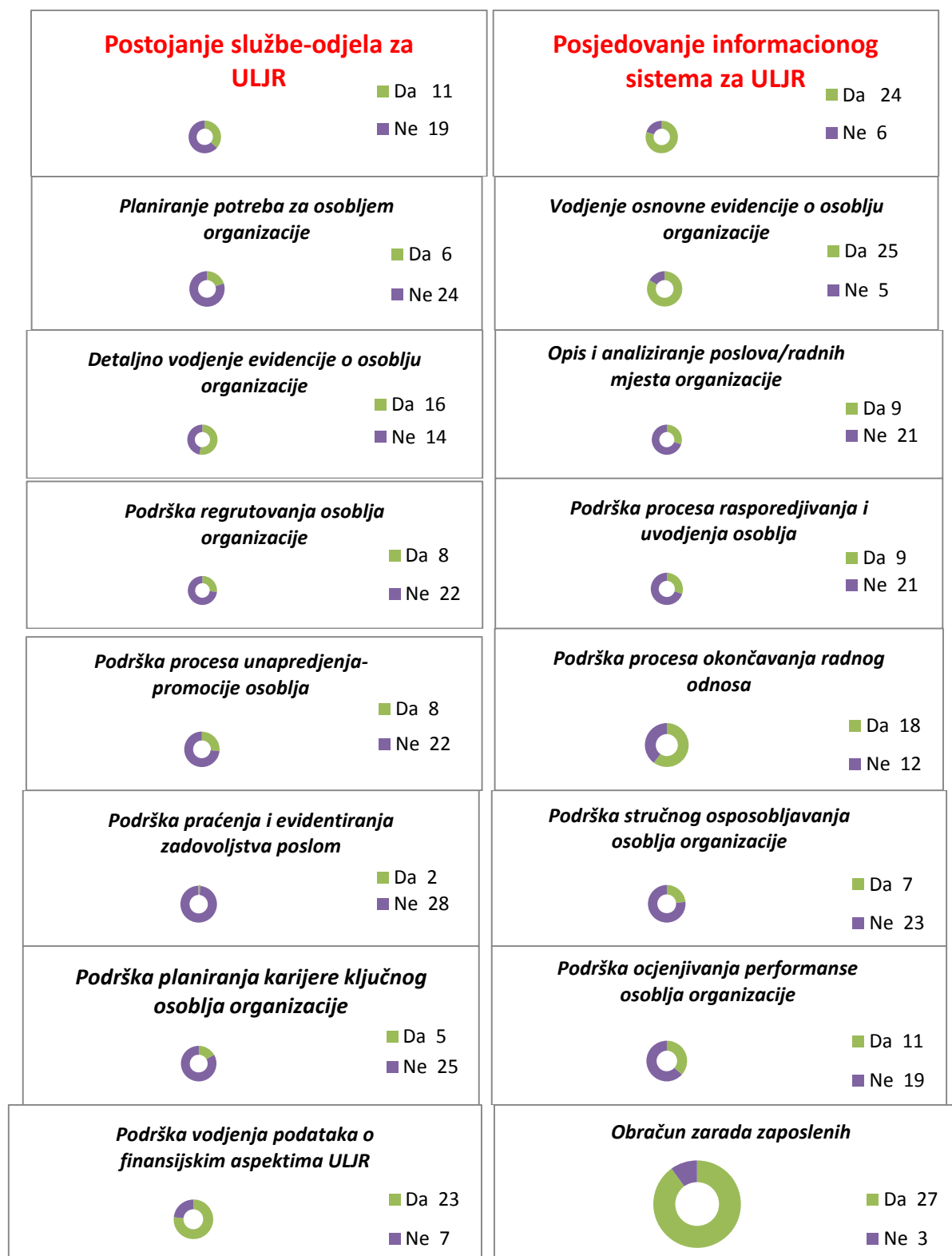
- Planiranje potreba za osobljem organizacije.
- Vođenje osnovne evidencije o osoblju organizacije.
- Detaljno vođenje evidencije o osoblju organizacije.
- Opis i analiziranje poslova / radnih mjesta organizacije.
- Podršku regrutovanja osoblja organizacije.
- Podršku procesa raspoređivanja i uvođenje osoblja.
- Podršku procesa unapređenja-promocije osoblja.
- Podršku procesa okončavanja radnog odnosa.
- Podrška praćenja i evidentiranja zadovoljstva poslom.
- Podršku stručnog osposobljavanja osoblja organizacije.
- Podršku planiranja karijere ključnog osoblja organizacije.
- Podršku ocjenjivanja performanse osoblja organizacije.
- Podršku vođenja podataka o finansijskim aspektima ULJR.
- Obračun zarada.
- Podršku realizacije E-učenja.
- Podršku E-regrutovanja.

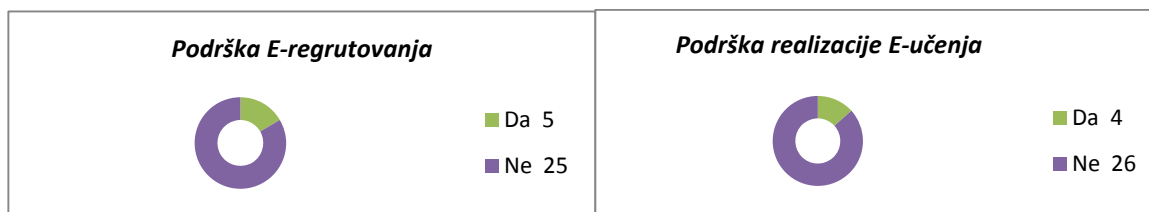
Podaci dobijeni istraživanjem: Podaci prikupljeni ispitivanjem ispitanika prikazani su u Prilogu 1. Grafikonu obrađenih podataka - Obrađeni podaci dobijeni ček listom funkcionalnosti upravljačkog IS ljudskih resursa.

Tumačenje obrađenih podataka - rezultata istraživanja: Dobijeni podaci predstavljeni grafikonima, jasno i nedvosmisleno ukazuju na to da se u organizacijama u gradovima Banja Luka, Prijedor, Doboj, Prnjavor i Gradiška vrlo pojednostavljeno primjenjuje savremeno upravljanje ljudskim resursima. Ako imamo u vidu činjenicu da su ljudski resursi ključ kompetitivne prednosti i značajan faktor društveno-ekonomskog napretka i razvoja, onda se nameće zaključak da je ovaj segment poslovanja značajno zapostavljen i da se njime upravlja na zastarjeli način. Podaci pridobiveni istraživanjem u prvi mah daju optimističan podatak da čak 24 od 30 organizacija posjeduje neki od informacionih sistema koji podržavaju njihovo poslovanje. Međutim, dalja detaljnija analiza stanja, dovodi do saznanja da se informacione tehnologije i sistemi skoro isključivo koriste za obračun plata zaposlenih i ostalih finansijskih nadoknada kao i za vođenje osnovne evidencije zaposlenih. Najčešće ih koriste službe računovodstva ili pravna služba, a ne odjeli za upravljanje ljudskim resursima, koje mali broj organizacija uopšte i posjeduje. Na prvi pogled se čini da je dio odgovora u nekoj vrsti kolizije, jer su neki ispitanici odgovorili da ne posjeduju informacioni sistem za ULJR, a ipak su naveli da neke funkcionalnosti softvera postoje. To se tumači tako, što određenu informacionu podršku koriste druge službe. Osim obračuna finansijskih nadoknada i vođenja osnovne evidencije

zaposlenih, sve ostale funkcionalnosti softverskih sistema su neznatno ili nikako primjenjene u praksi organizacija u gradovima Republike Srpske.

Prilog 1: Grafikoni obrađenih podataka





Izvor: Obradeni podaci dobijeni ček listom funkcionalnosti upravljačkog IS ljudskih resursa

ZAKLJUČCI

ERP sistemi, HRIS i DSS u BI (Business Intelligence) tehnologiji organizaciji u procesu upravljanja ljudskim resursima obezbjeđuju odličnu podršku i daju proaktivna rješenja problema zaposlenih. To je od velike, neprocjenjive pomoći u prepoznavanju talenata, planiranju, regrutovanju i izboru, smanjenju troškova, zadržavanju talenata, boljoj i pouzdanijoj segmentaciji zaposlenih i slično. Sve će se to odraziti i uticati na efikasnost zaposlenih. Rješenja IT, bilo da su u pitanju ERP sistemi, HRIS ili BI sistemi (a najbolja su komplementarna rješenja i jednih i drugih), daju nove aspekte upravljanja ljudskim resursima, omogućavajući odjeljenjima ljudskih resursa efektivnu i efikasnu transakcionu obradu podataka, automatizaciju velikog broja procesnih aktivnosti, zatim generisanje raznih izvještaja o zaposlenima, sprovođenje mnoštva analiza, što opet potpomaže proces tačnog, preciznog i pouzdanog odlučivanja u organizaciji u cjelini. Nema efikasnog strategijskog upravljanja ljudskim resursima bez podrške informacionih tehnologija i informacionih sistema. Razvoj informacionih tehnologija i informacionih sistema dramatično mijenja upravljanje ljudskim resursima. Strategijska spremnost informacionog kapitala (IT i sistema) je najsmislenija mjera vrijednosti informacionog kapitala organizacije.

Problemi istraživanja u empirijskom istraživanju izraženi su skupom istraživačkih pitanja i hipoteza na koja je istraživanje dalo odgovarajuće odgovore. Cilj i generalni inicijalni povod bilo je nastojanje da se stekne ocjena aktuelnog stanja u profitnom i neprofitnom sektoru, odnosno zamisao da se istraživanjem steknu nedostajuće informacije o sadržaju i načinu upravljanja ljudskim resursima, posmatranom u kontekstu informacionih sistema.

Odgovori na istraživačko pitanje su jasno i nedvosmisleno predstavljeni u segmentu rezultata istraživanja u ovom radu i evidentno se nameće odgovor da je u regiji gradova Banja Luka, Prijedor, Doboj, Prnjavor i Gradiška, upravljanje ljudskim resursima skromno, nepotpuno i u nedovoljnoj mjeri podržano informacionim sistemom upravljanja ljudskim resursima. Obe hipoteze su potvrđene: u praksi organizacija iz kojih je uzet uzorak **nije** dovoljno rasprostranjena primjena savremenog upravljanja ljudskim resursima, **niti** dovoljno rasprostranjena primjena upravljačkog informacionog sistema ljudskih resursa. Cilj empirijskog istraživanja bio je sticanje informacija o načinu upravljanja ljudskim resursima u organizacijama različitih sfera poslovanja i njihovoj strategijskoj spremnosti, što je u ovom naučnom radu i realizovano.

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UTICAJ LJUDSKOG KAPITALA NA FINANSIJSKE PERFORMANSE PREDUZEĆA

THE INFLUENCE OF HUMAN CAPITAL ON THE FINANCIAL PERFORMANCE OF ENTERPRISES

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Sadržaj: *Ljudski kapital predstavlja specifična znanja, veštine, sposobnosti i iskustva zaposlenih. Kao jedna od komponenti intelektualnog kapitala, ljudski kapital svojstven je zaposlenima, koji uz sposobnost učenja novih stvari, timskog rada, fleksibilnosti i posvećenosti preduzeću predstavljaju resurs koji je teško kopirati i koji će voditi ostvarivanju visokog nivoa performansi i postizanju održive konkurentske prednosti. Posebno je značajan uticaj koji ljudski kapital može ostvariti na finansijske performanse, pogotovo na one koje se tiču zarađivačke sposobnosti i efikasnosti upotrebe imovine. Imajući u vidu navedeno, realizovano je istraživanje nad uzorkom od 50 preduzeća koja posluju na teritoriji Republike Srbije. Ovim putem ispitan je uticaj ljudskog kapitala na stopu prinosa na ukupnu imovinu (ROA) i stopu prinosa na ukupno uloženi kapital (ROE), pri čemu su rezultati istraživanja pokazali da postoji pozitivan uticaj ljudskog kapitala na navedene pokazatelje.*

Ključne reči: *ljudski kapital, nematerijalna aktiva, intelektualni kapital, finansijske performanse*

Abstract: *Human capital represents specific knowledge, skills, abilities and experiences of employees. As one of the components of intellectual capital, human capital is peculiar to employees, who, with the ability to learn new things, teamwork, flexibility and dedication to the company, represent a resource that is hard to copy and which will lead to achieving a high level of performances and sustainable competitive advantage. Particularly significant is the impact that human capital can have on financial performance, especially those related to earning capacity and the efficiency of the use of assets. Bearing in mind the above, a survey was conducted on the sample of 50 companies operating on the territory of the Republic of Serbia. In this way, the influence of human capital on the ROA and ROE was tested, where the results of the survey showed that there is a positive impact of human capital on these indicators.*

Key words: *human capital, intangible assets, intellectual capital, financial performance*

1. UVOD

U savremenim uslovima poslovanja, koji se mogu opisati kao era zasnovana na znanju, resursi koji nemaju svoju fizičku formu predstavljaju jedan od najbitnijih faktora uspeha. Za razliku od fizičkih, odnosno materijalnih resursa poput zgrada, mašina, opreme, zemljišta i sl, nematerijalni resursi nemaju svoju fizičku suštinu i odnose se na specifična znanja zaposlenih, patente, poznavanje potreba potrošača, organizacionu kulturu i druge faktore koji mogu voditi poslovnom uspehu [1]. Navedeni, kao i brojni drugi faktori

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predstavljaju sastavne elemente tzv. intelektualnog kapitala i oni se mogu svrstati u tri velike grupe: ljudski, strukturni i relacioni kapital [2]. Ipak, efektivnost intelektualnog kapitala zahteva postojanje zaposlenih koji imaju specifične kompetencije i koji su posvećeni preduzeću. Posvećeni i iskusni zaposleni omogućiće ostvarivanje visokog nivoa performansi, pa se zbog toga može reći da ljudski resursi predstavljaju ključni faktor uspeha preduzeća [3].

Skup znanja, veština, iskustva, kreativnosti i inovativnosti zaposlenih predstavlja ljudski kapital. Glavni nosioci tzv. ljudskog kapitala jesu zaposleni, koji implementiranjem specifičnih kompetencija omogućavaju stvaranje vrednosti preduzeća i postizanje održive konkurentske prednosti [4]. Oni zaposleni koji poseduju specifična znanja i koji su fleksibilni, posvećeni preduzeću, spremni da nauče nove stvari, lojalni i odgovorni, predstavljaju jedinstveni resurs koji nije moguće tako lako kopirati i koji će voditi dugoročnom uspehu. U takvim preduzećima obezbeđuje se retencija ključnih zaposlenih, privlače se najbolji talenti sa tržišta rada, raste organizaciona posvećenost i zadovoljstvo poslom, a to u konačnom vodi i rastu ukupnih performansi preduzeća.

Imajući u vidu navedeno, osnovni cilj ovog rada jeste da se utvrdi uticaj ljudskog kapitala na finansijske performanse preduzeća. Kako bi cilj bio ostvaren, realizovano je istraživanje nad uzorkom od 50 preduzeća koja posluju na teritoriji Republike Srbije.

2. PREGLED LITERATURE

U strategijskom menadžmentu, koji je karakterističan za savremene uslove poslovanja koje karakterišu učestale promene, odavno je prihvaćeno da znanje i sa njim povezani fenomeni predstavljaju ključni izvor uspeha i konkurentske prednosti [5]. Ljudski resursi, odnosno zaposleni, predstavljaju nosioce navedenog znanja u preduzećima, koje je zapravo jedna od ključnih komponenti nematerijalne aktive. *Hall* je nematerijalnu aktivu podelio na dve komponente: na aktivu koja se može i na aktivu koja se ne može odvojiti od ljudskih resursa [6]. U prvom slučaju radi se o komponentama intelektualnog kapitala, poput patenata, žigova, baza podataka, organizacione kulture, tehnoloških rešenja itd. U drugom slučaju radi se o ljudskom kapitalu, koji se ističe kao jedan od ključnih faktora uspeha i održive konkurentske prednosti preduzeća [7].

Ljudski kapital se može definisati kao skup znanja, veština, iskustva, stavova, posvećenosti, inovativnosti i kompetentnosti zaposlenih [8]. Centralna komponenta ljudskog kapitala je znanje [9]. Međutim, ljudski kapital osim znanja zaposlenih podrazumeva i brojne druge faktore, poput kreativnosti, talenta, kapaciteta za učenje novih stvari, odgovornosti, posvećenosti, motivisanosti, entuzijazma, lojalnosti, fleksibilnosti i spremnosti za timski rad [10]-[11]. Ovo je u skladu sa [12], koji ističe da ljudski kapital ima četiri komponente: elemente koje svaki zaposleni unosi u preduzeće (iskustvo, veštine, inteligencija, itd.), sposobnost učenja novih stvari, sposobnost delovanja i motivisanost zaposlenih. Kao takav ljudski kapital se odnosi na procese i aktivnosti poput obučavanja, edukacije i druge profesionalne inicijative koje za cilj imaju porast nivoa znanja, sposobnosti i vrednosti [13]. Kao rezultat postojanja ljudskog kapitala, dolazi do rasta zadovoljstva zaposlenih na radnom mestu, što dalje unapređuje ukupne performanse čitavog preduzeća [14]. Zbog toga je u savremenim uslovima poslovanja nužno izgraditi jedinstveni ljudski kapital. Međutim, samo kreiranje ljudskog kapitala ne znači automatski uspeh u poslovanju. Pre svega, ukoliko se napravi razlika između opšteg i specifičnog ljudskog kapitala, može se zaključiti da opšti ljudski kapital (koji se stiče obrazovanjem i koji na neki način može biti dostupan svima) neće sam po sebi voditi održivoj konkurentskoj prednosti, jer je takav kapital moguće lako kopirati. Zato je cilj izgraditi

specifični ljudski kapital, svojstven samo datom preduzeću i njegovim zaposlenima [15]. Izgradnja jedinstvenog ljudskog kapitala može se postići obezbeđivanjem treninga, izgradnjom organizacione strukture i kulture koja neguje dobre međuljudske odnose, podstiče kreativnost, inovativnost, uvažava ideje zaposlenih, uključuje ih u odlučivanje i postavljanje ciljeva itd.

Resursno bazirani pristup (*Resource based view*) polazi od stava da resursi predstavljaju izvor održive konkurentske prednosti ukoliko su oni retki, vredni, teški za imitiranje i nepodesni za supstituciju [16]. Polazeći od zaposlenih i njihovih znanja, odnosno ljudskog kapitala, konkurentska prednost biće ostvarena zbog toga što je ljudski kapital jedna od ključnih determinanti kvaliteta proizvoda i usluga i zbog toga što je on heterogeno distribuiran širom preduzeća (može biti veoma redak i jedinstven) [17]. Ovome treba dodati i činjenicu da se znanje ne troši upotrebom, koristi se na više mesta u istom trenutku i njegovim kombinovanjem dobijaju se nove informacije i forme znanja [5].

Ljudski kapital mora biti upošljen tako da obezbeđuje prinos na uloženi kapital, budući da njegovo stvaranje podrazumeva izvesne izdatke preduzeća, koji se moraju posmatrati kao investicija, a ne kao trošak [1]. Shodno tome, potrebno je pronaći takva merila ljudskog kapitala koja će u obzir uzimati vrednost koja mora biti ostvarena kako bi se obezbedila održiva konkurentska prednost. U tom slučaju se kao posebno korisno merilo ističe tzv. VAIC model (*Value Added Intellectual Coefficient*). Prema navedenom modelu, dodata vrednost (VA) se dobija kada se od prihoda od prodaje (OUT) oduzmu ukupni troškovi (IN), osim onih troškova koji se odnose na zarade zaposlenih, koji se ne tretiraju kao trošak već kao investicija u ljudski kapital [18]. Model se može izraziti kvantitativno na sledeći način:

$$VA=OUT-IN \quad (1)$$

Da bi se utvrdilo kako je vrednost ostvarena, u razmatranje je potrebno uzeti sve komponente intelektualnog kapitala (ljudski, strukturni i relacioni). Međutim, imajući u vidu obuhvat ovog rada, u dalje razmatranje uzet je samo ljudski kapital (HCA), koji se kvantitativno može odrediti kada se prethodno utvrđena dodata vrednost (VA) podeli sa ukupnim zaradama isplaćenim zaposlenima u jednoj godini (HC) [1], što se kvantitativno može predstaviti kao:

$$HCE=VA/HC \quad (2)$$

Ljudski kapital obezbeđuje brojne prednosti preduzeću, pri čemu svakako treba izdvojiti one koje se tiču finansijskih performansi. Janošević i dr. su došli do zaključka da ljudski kapital ima pozitivan uticaj na stopu prinosa na ukupnu imovinu (ROA) i ukupno uloženi kapital (ROE) [1]. Polazeći od navedenih rezultata, kao i činjenice da ROA i ROE predstavljaju finansijske pokazatelje koji istovremeno prikazuju i zarađivačku sposobnost i efikasnost upotrebe imovine preduzeća, mogu se postaviti sledeće hipoteze:

H1: Ljudski kapital ostvaruje pozitivan uticaj na stopu prinosa na ukupno uloženu imovinu preduzeća (ROA);

H2: Ljudski kapital ostvaruje pozitivan uticaj na stopu prinosa na ukupno uloženi kapital preduzeća (ROE).

3. METODOLOGIJA ISTRAŽIVANJA

Kako bi se ispitao osnovni cilj rada, sprovedeno je istraživanje nad preduzećima koja posluju na teritoriji Republike Srbije. Sledeći istraživački pristup koji su realizovali [1], odabrano je 50 preduzeća koja se prema podacima Agencije za privredne registre u toku 2017. godine izdvajaju po ostvarenom neto dobitku [19]. Navedena preduzeća pripadaju privatnom i javnom sektoru i

finansirana su domaćim i stranim kapitalom. U navedenim preduzećima se značajna sredstva izdvajaju za plate i edukaciju zaposlenih, pa su zbog toga takva preduzeća pogodna za analizu uticaja ljudskog kapitala na finansijske performanse. Zavisne varijable u modelu (ROA i ROE) dobijaju se kada se ukupno ostvareni dobitak nakon poreza podeli sa ukupno uloženom imovinom, odnosno aktivom preduzeća (ROA) i kada se neto dobitak nakon poreza podeli sa ukupno uloženim akcijskim kapitalom (ROE).

Od statističkih analiza u radu su primenjene deskriptivna statistička analiza, a kako bi se ispitale hipoteze primenjena je prosta linearna regresiona analiza. Obrada podataka izvršena je uz pomoć statističkog softvera SPSS v.23.

4. REZULTATI ISTRAŽIVANJA

Na samom početku analize primenjena je deskriptivna statistička analiza kako bi se utvrdile srednje vrednosti, prosečno odstupanje, minimum i maksimum ostvarenih finansijskih performansi. Dobijeni rezultati prikazani su u Tabeli broj 1.

Tabela 1. Rezultati deskriptivne statističke analize

| | Neto dobitak | Poslovni prihod | Ukupni troškovi | Zarade zaposlenih | Ukupna imovina | Kapital |
|-----------------------|--------------|-----------------|-----------------|-------------------|----------------|-------------|
| Aritmetička sredina | 6443441,5 | 35236118,16 | 31743293,46 | 4144138,38 | 70089575,78 | 39546511,68 |
| Standardna devijacija | 15174671,44 | 47992054,03 | 42079941,16 | 9953329,644 | 175944693,2 | 124089693,3 |
| Minimum | 1317319 | 1105 | 49072 | 6682 | 200000 | 194062 |
| Maksimum | 100311332 | 234711482 | 195622413 | 67414438 | 1179355624 | 853482204 |

Napomena: Podaci su u hiljadama

Izvor: Autor

Posmatrajući dobijene rezultate u prethodnoj tabeli, može se zaključiti da preduzeća u uzorku ostvaruju prosečno 6,4 milijardi dinara neto dobitka, 35,2 milijardi dinara poslovnog prihoda, dok su ukupni troškovi u proseku 31,7 milijardi dinara. Prosečno ulaganje sredstava u ljudski kapital iznosi 4,1 milijardu dinara, prosečna vrednost imovine iznosi 70 milijardi dinara, a akcijskog kapitala 39,5 milijardi dinara. Najveće odstupanje između posmatranih preduzeća javlja se u pogledu vrednosti imovine, gde je standardna devijacija najviša. Kada je reč o ostvarenim rezultatima, najviša ostvarena neto dobit u uzorku iznosi 100,3 milijardi dinara, a najniža 1,3 milijardi dinara. Najviše ulaganja u ljudski kapital izvršilo je preduzeće koje za ove potrebe izdvaja 67,4 milijardi dinara, a najmanje ulaganja preduzeće koje je izdvojilo svega 6,6 miliona dinara.

Primenom metoda proste regresione analize ispitan je uticaj ljudskog kapitala na stopu prinosa na ukupnu poslovnu imovinu i ukupno uloženi kapital. Dobijeni rezultati prikazani su u Tabeli broj 2.

Tabela 2. Rezultati regresione analize

| Hipoteza | β | sig. | VIF |
|-----------------------|---------|-------|-------|
| HCE \rightarrow ROA | 0,022 | 0,03 | 1,000 |
| HCE \rightarrow ROE | 0,026 | 0,006 | 1,000 |

Izvor: Autor

Kako je p vrednost (sig) u oba slučaja manja od 0,05, može se zaključiti da ljudski kapital (HCE) ostvaruje pozitivan uticaj na stopu prinosa na ukupnu imovinu (ROA) i stopu prinosa na ukupno uloženi kapital (ROE), pa se na osnovu toga može konstatovati da su H1 i H2 hipoteze potvrđene. Ipak, treba primetiti da je beta koeficijent u oba slučaja nizak, što znači da se upotrebljene zavisne varijable nalaze pod dejstvom brojnih drugih faktora, a ne samo ljudskog kapitala. U oba slučaja problem multikolinearnosti izostaje, budući da VIF koeficijent ima vrednost manju od maksimalno dozvoljene vrednosti 5 [20].

5. DISKUSIJA REZULTATA I ZAKLJUČAK

Ljudski kapital, koji se može shvatiti kao skup veština, sposobnosti i iskustva zaposlenih, predstavlja jedan od ključnih faktora uspeha i održive konkurentske prednosti, budući da je zaposlene koji poseduju kompetencije koje su retke, vredne, teške za imitiranje i nepodesne za supstituciju teško kopirati. Kao rezultat jedinstvenog ljudskog kapitala, preduzeća su u stanju da stvore lojalne i motivisane zaposlene koji će ostvariti iznad prosečne performanse.

Kako bi se utvrdio uticaj ljudskog kapitala na finansijske performanse, izvršeno je istraživanje nad uzorkom od 50 preduzeća koja posluju na teritoriji Republike Srbije. Reč je o preduzećima koja su u toku 2017. godine ostvarila veoma visoke nivoe profita i koja su, kao takva, podesna za analizu, budući da značajan deo sredstava reinvestiraju u unapređenje kompetencija zaposlenih, odnosno ljudskog kapitala. U istraživačkom modelu praćen je uticaj ljudskog kapitala na stopu prinosa na ukupnu imovinu i uloženi kapital. Navedene zavisne varijable odabrane su zbog toga što istovremeno predstavljaju i prinosnu sposobnost i efikasnost korišćenja imovine preduzeća. Dobijeni rezultati istraživanja su pokazali da ljudski kapital ostvaruje statistički značajan uticaj na stopu prinosa na ukupnu imovinu i uloženi kapital, čime su obe istraživačke hipoteze potvrđene. Međutim, beta koeficijent u posmatranom modelu je veoma nizak, što znači da ljudski kapital opisuje samo mali procenat varijabiliteta stope prinosa na ukupnu imovinu i uloženi kapital. Navedene varijable se verovatno nalaze pod većim uticajem drugih računovodstvenih i finansijskih pokazatelja, poput neto dobitka. Pored toga, ljudski kapital predstavlja jednu od komponenti nematerijalne aktive, pa je zbog toga realno očekivati da će on veći uticaj imati na određene nematerijalne pokazatelje poslovanja, poput stope fluktuacije, organizacione posvećenosti i zadovoljstva zaposlenih. Takođe, potrebno je imati u vidu da zavisne varijable u modelu u velikoj meri operišu sa neto dobitkom preduzeća, a poznato je da se neto dobitak često nalazi pod dejstvom određenih manipulativnih aktivnosti, kako bi se on iskazao kao nerealno visok ili nizak.

Teorijski doprinos rada ogleda se u proširivanju postojećeg znanja koje se tiče uticaja ljudskog kapitala na finansijske performanse. Značaj rada ogleda se u činjenici da je rad realizovan u trenutku kada se Republika Srbija nalazi u procesu tranzicije, čime se stvara osnov za istraživanja u sličnim ekonomijama, ali i mogućnost poređenja dobijenih rezultata sa rezultatima sprovedenih istraživanja nakon završenog procesa tranzicije srpske privrede.

Menadžerski doprinos rada ogleda se predstavljanju dobijenih rezultata privrednicima i ekspertima, koji izgradnjom jedinstvenog ljudskog kapitala u preduzeću mogu ostvariti visoke finansijske performanse.

Ograničenje rada ogleda se najpre u uzorku. Pored veličine, koja mora biti povećana u budućim istraživanjima, potrebno je obezbediti i drugačiju strukturu uzorka, tako da u njemu budu uključena preduzeća iz različitih grana, kao i preduzeća koja imaju sličnu strukturu, veličinu i broj zaposlenih, kako bi rezultati istraživanja bili precizniji. Dodatno, potrebno je ispitati uticaj

ljudskog kapitala na druge finansijske performanse, posebno one vrednosne, koje ne operišu primarno sa neto dobitkom. Pored toga, potrebno je ispitati i uticaj ljudskog kapitala na određene nematerijalne rezultate poslovanja, poput stope fluktuacije, zadovoljstva i posvećenosti zaposlenih.

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ULOGA MENADŽMENTA LJUDSKIH RESURSA U MOTIVICIJI ZAPOSLENIH

THE ROLE OF MANAGEMENT OF HUMAN RESOURCES IN MOTIVATION OF EMPLOYEES

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Sadržaj: *Zaposleni predstavljaju najvredniji deo svake organizacije, stoga je njihovo motivisanje jedan od najznačajnijih aspekata MLJR. Glavni ciljevi ovog rada se odnose na razmatranje niza pitanja povezanih sa MLJR: identifikovanje i razumevanje faktora koji motivišu zaposlene ali i koji činioci utiču na zadovoljstvo na radu. Korišćen je metod kvalitativnog istraživanja, koji je korišćen za obavljanje intervjua sa zaposlenima radi boljeg razumevanja šta je to što motiviše zaposlene ali i koje motivacione strategije mogu biti korišćene u tu svrhu.*

Ključne reči: *Upravljanje ljudskim resursima, motivacija, strategije motivacije, zaposleni.*

Abstract: *Employees are the most valuable part of any organization, so one of the most important role of HRM is to motivate them. The main objectives of this study are to discuss a range of issues that are connected with the HRM, such as to identify and understand factors that truly motivates employees, and what factors affect job satisfaction. The method used in this research is qualitative research, it is used to conduct interviews with employees for the purpose of better understanding what drives employee motivation and what motivating strategies could be used in that purpose.*

Keywords: *Human resource management, motivation, motivating strategies, employees.*

1. UVOD

Motivacija je bitan element svih sfera čovekovog života, pa i njegovog radnog angažovanja, a nivo motivacije zaposlenih ima presudan uticaj na kvalitet obavljanja posla. Predmet rada je istraživanje uloge i značaja menadžmenta ljudskih resursa (dalje MLJR) u motivaciji zaposlenih kao i njihova praktična primena. Glavni ciljevi ovog rada se odnose na razmatranje pitanja vezanih za identifikovanje i razumevanje faktora koji motivišu zaposlene, ali i činioca koji utiču na zadovoljstvo na radu.

2. MENADŽMENT LJUDSKIH RESURSA U SAVREMENIM ORGANIZACIJAMA

Obzirom da oblast MLJR karakteriše dinamičan razvoj te teoretska i praktična znanja brzo bivaju prevaziđena, jedno je sigurno - ljudski resursi nisu tek prost zbir zaposlenih, već se pod njima "podrazumevaju ukupni ljudski potencijali: raspoloživa znanja i iskustva, upotrebljive

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sposobnosti i veštine, moguće ideje i kreacije, stepen motivisanosti i zainteresovanosti za ostvarivanje organizacionih ciljeva i slično" [1]. MLJR se odnosi na sve aktivnosti menadžmenta u kontekstu označavanja određenog pristupa upravljanju ljudima i njihovim radnim potencijalima, to je strategijski pristup upravljanju najvrednijim resursima jedne organizacije - zaposlenima. Da bi organizacija ostvarila poslovne ciljeve, MLJR pre svega treba da identifikuje potrebe i suštinski shvati ponašanja zaposlenih, pa na osnovu njih kreira strategije za podizanje efektivnosti rada.

2.1. ULOGA MLJR U UPRAVLJANJU MOTIVACIJOM ZAPOSLENIH

Pojam motivacije se vezuje za latinsku reč: movere odnosno pomeranje i najgrublje može da se opiše kao ciljno usmereno ponašanje imajući u vidu da su ljudi motivisani u situacijama kada nakon preduzete akcije očekuju ostvarenje cilja i nagradu koja će zadovoljiti njihove potrebe "Radna motivacija se pokazala kao jedna od najznačajnijih pretpostavki efektivnosti rada i dostizanja zadatih ciljeva kako pojedinaca tako i cele organizacije" [2]. Uloge MLJR u kontekstu motivacije zaposlenih se prevashodno odnose na planiranje i selekciju, pružanje jasnih i pravovremenih informacija i obaveštenja zaposlenima, upravljanje njihovim karijerama, praćenje i vrednovanje njihovog radnog učinka, odabir odgovarajućih motivatora identifikovanjem motiva zaposlenih da bi bilo kreirano podsticajno radno okruženje gde će njihove sposobnosti biti iskorišćene u punom kapacitetu, ali i omogućavanje zaposlenom vremena za sebe, lične obaveze i organizovanje vremena.

3. ANKETA

Osnovni skup za anketiranje zaposlenih obuhvatio je 29 korisnika interneta, koji su odgovorili na 16 anketnih pitanja. Podaci su sakupljeni putem elektronske pošte. Učešće u anketi je bilo anonimno, jedini uslov za učestvovanje bio je da su ispitanici zaposleni.

1. Prvo pitanje iz ankete se odnosilo na pol ispitanika. Učestvovalo je njih 29, od toga 19 žena ili 66% i 10 muškarca ili 34%.
2. Odgovori na drugo pitanje govore da je 24 ispitanih ili 83 % menjalo mesto zaposlenja, dok je njih 5 ili 17% odgovaralo sa pozicije svog prvog radnog mesta.
3. Slika nivoa obrazovanja ispitanika je sledeća: njih 10 ili 34% ima zvanje mastera, osnovne akademske studije završilo je njih 13 ili 45%, visoku školu ima njih dvoje ili 7% dok je njih 4 ili 14% sa srednjoškolskim obrazovanjem.
4. Ispitanici su mladi i srednjih godina, sledeće strukture: 27, 28, 35, 36, 38 i 40 godina imao je po jedan ispitanik; 29, 30, 34, 37, 41 i 42 godine su godine starosti koje su imala po dva ispitanika; 3 ispitanika su bili starosti 33 godine; po 4 ispitanika je imalo 31 odnosno 32 godine.
5. Peto pitanje istražuje stepen motivisanosti trenutnim radnim mestom, odnosno zadovoljstvo zaposlenih uslovima rada. Najveći broj ispitanih, njih 10 ili 34% je u velikoj meri zadovoljno; njih 6 ili 21% je umereno zadovoljno što ukazuje na značajan prostor za rad na podizanju radne motivacije velikog broja ispitanika, malo zadovoljstvo se beleži kod 5 ispitanika ili 17%; donekle je zadovoljno njih 4 odnosno 14%, a isti broj ispitanih se izjasnio kao nimalo zadovoljni. Od velikog je značaja da radna organizacija uoči motivaciju kao delotvorno sredstvo za upravljanje potencijalima zaposlenih. Treba naglasiti da je zadovoljstvo zaposlenih uslovima rada vrlo jak motivator jer proističe iz pozitivne percepcije radnog zadatka i ukupnih uslova

rada. Obzirom da vreme provedeno na poslu obuhvata veliki deo dana važno je da se zaposleni u okviru radnog okruženja oseća ugodno i da ga ono dodatno motiviše.

6. Šesto pitanje se bavi istraživanjem da li ispitanici imaju priliku da svakoga dana na radnom mestu rade ono u čemu su najbolji. Najveći broj njih 9 ili 31% smatra da u velikoj meri svakodnevno obavljaju poslove u kojima su najbolji, ali zato neznatno manji broj njih 7 ili 24% smatra da se njihovi najbolji potencijali svakodnevno koriste tek donekle, dok se za njih 6 ili 21% takva prilika ukazuje u umerenoj meri. Pet ispitanika odnosno 17% smatra da se u okviru svakodnevnih radnih zadataka malo koriste njihove najbolje veštine, dok njih 2 ili 7% smatra da se ne koriste nimalo, što njihovim organizacijama otvara široke mogućnosti za poboljšanje ovog aspekta.

7. U okviru sedmog pitanja se razmatra da li se na poslu mišljenje ispitanika uzima u obzir. Mišljenje najvećeg broja, njih 10 ili 34% se u velikoj meri uzima u obzir dok 8 ili 28% njih smatra da se to dešava u umerenoj meri. Više od polovine ukupnih odgovora pripada pozitivnom delu spektra što znači da njihove organizacije uzimaju u obzir i uvažavaju stavove zaposlenih od kojih mogu mnogo saznati o njihovom shvatanju i pristupu poslu, ali i dobiti korisne predloge. Uzimanjem u obzir mišljenje zaposlenih MLJR pokazuje da ih ceni. Jednak broj ispitanika, njih 5 odnosno 17% smatra da se njihovo mišljenje donekle ili malo uzima u obzir što je alarm njihovim organizacijama da nešto nije u redu sa aspekta motivacije ka radu, njihov MLJR mora dodatno da se angažuje kako se zaposleni ne bi osećali isključivo kao puki izvršioци radnih zadataka. Jedan ispitanik ili 3% smatra da se njegovo mišljenje nimalo ne uzima u obzir, a sve dok se njegov glas ne čuje on se neće osećati delom svog radnog okruženja.

8. Osmo pitanje istražuje da li zaposleni ima osećaj da je njegov posao važan uzimajući u obzir misiju njegove kompanije. Misija i ciljevi organizacije moraju biti u saglasnosti sa ciljevima zaposlenog jer jedino kada se on identifikuje sa organizacijom doživljavajući je kao svoju drugu kuću biće i motivisan za rad, odnosno ako se ne identifikuje teško će se uklopiti i slabiće njihova radna motivacija. Najveći broj ispitanika, njih 9 ili 31% umereno doživljava svoj posao važnim, kao i njih 8 ili 28% koji taj doživljaj imaju u velikoj meri. Posebno je značajno da organizacija pri definisanju misije ima u vidu vrednosti sa kojima zaposleni mogu lako da se identifikuju, da lične vrednosti prepoznaju u njoj što će ih emotivno vezati, jer ravnodušnost zaposlenih prema misiji organizacije svakako predstavlja loš znak za MLJR. Isti broj ispitanika, njih 5 ili 17% se izjasnio da svoj posao spram misije organizacije smatraju važnim malo, odnosno nimalo, što signalizira na lošu vezu radnika i organizacije u smislu nedovoljno jake organizacione kulture a to je prilika MLJR za rad na vezivanju i poistovećivanju zaposlenih sa motivima i vrednostima radne organizacije. Važnost svog posla u odnosu na misiju organizacije njih dvoje ili 7% prepoznaje donekle.

9. Deveto pitanje istražuje da li menadžment ima komunikaciju sa zaposlenima na temu njihovog profesionalnog napredovanja i razvoja. Najveći broj ispitanika, njih 9 ili 31% imali su ovu vrstu komunikacije u umerenoj meri, MLJR treba uvek da ima na umu da komunikacija, a naročito ona koja se tiče profesionalnog napredovanja i razvoja, određuje stav radnika prema radnom zadatku, ali i čitavoj organizaciji. Jednak broj ispitanika, njih 5 ili 17% izjasnili su se da su komunikaciju sa MLJR na temu napredovanja imali u velikoj meri, odnosno donekle - ovde treba naglasiti značaj toga da zaposleni dobro razumeju mehanizam razvoja karijere koji vodi sigurnosti i povećanju kompetentnosti i samostalnosti u radu, ali i načine komuniciranja po tom pitanju. U okviru negativnog dela skale se izjasnilo 9 ispitanika, 14% njih je komunikaciju sa MLJR vezano za razvoj karijere imao malo, 21% nimalo, a upravo su nepostojanje komunikacije ili neadekvatan način komuniciranja najčešći uzroci nezadovoljstva radnika.

10. Da li organizacija pruža osećaj sigurnosti zaposlenom je tema desetog pitanja. Najveći broj, njih 9 ili 31% u velikoj meri oseća sigurnost koje mu pruža rad u organizaciji, to ukazuje na visok stepen poverenja između organizacije i zaposlenih što je odlika dobrih i jakih poslodavca. Sigurnost koju pruža radno mesto 8 njih ili 28% doživljava umereno, a njih 5 ili 17% donekle što je razumljivo s obzirom na to da sigurnost radnog mesta u organizaciji nije nešto apsolutno zagarantovano. Ovu vrstu sigurnosti malo oseća njih 4 ili 14% dok je njih 3 ili 10% ne oseća nimalo, iako iz ugla motivacije radnika sposobnost organizacija da im omogući osećaj sigurnosti ima veliki značaj.

11. Jedanaesto pitanje istražuje da li zaposleni koji se više zalažu na poslu, više i zarađuju. Najveći broj, njih 8 ili 28% smatra da to nimalo nije slučaj, mada bi pravi put trebalo da bude onaj gde učinak vodi do nagrada, a posledično i zadovoljstva što podiže motivaciju. Povećano zalaganje tek umereno vodi višoj zaradi smatra njih 7 ili 24%, dok njih 6 ili 21% smatra da je to donekle slučaj. Da bi organizacija stavila u jasan odnos zalaganje i zaradu najbolje je da to demonstrira konkretnim primerima koji će se ustaliti i postati praksa. Zalaganje na poslu i zaradu srazmerno tome u velikoj meri prepoznaje njih 4 ili 14%, dok njih 2 ili 7% smatra da povećano angažovanje nije u korelaciji sa povećanom zaradom.

12. Dvanaesto pitanje istražuje da li pružanje dobrih radnih rezultata vodi ka mogućnosti za dodatnim usavršavanjem i napretkom. Napredovanje u organizaciji je svakako snažan motivator jer daje mogućnost za ostvarivanje aktuelnih i nekih budućih ciljeva i potreba što u velikoj meri njih 9 ili 31% ispitanih postiže putem dobrih radnih rezultata. Umereno ovaj odnos prepoznaje njih 6 ili 21% što govori o njihovim organizacijama koje radnicima u određenoj meri nude mogućnost razvoja potencijala i veština kao nagradu za postignute rezultate, jer se i ona razvija srazmerno tome. Dobri radni rezultati njih 3 ili 10% vode ka mogućnosti za dodatnim usavršavanjem, za 4 ispitanika ili 14% ta uzročnopsledična veza je malo, a za njih 7 ili 24% nimalo verovatna. Treba napomenuti da napredovanje nije uvek u korelaciji sa ostvarenim rezultatima jer postoje organizacije u kojima ovaj faktor motivacije nije dovoljno vrednovan i tamo se ono odvija stihijski i bez jasno definisanih parametara.

13. Trinaesto pitanje istražuje da li zaposleni prepoznaje mogućnosti za razvoj u okviru svoje organizacije. Najveći broj njih 8 ili 28% u velikoj meri identifikuje takve mogućnosti u okviru rane organizacije, a njih 7 ili 24% to čini umereno, ovde treba napomenuti da je želja za profesionalnim razvojem jak motivator. Tek jedan ispitanik donekle prepoznaje mogućnost razvoja, dok za jednak broj njih 6 ili 21% malo odnosno nimalo ne postoji takva mogućnost, ovakvi odgovori mogu biti posledica iskustva da se u okviru organizacije podstiče razvoj pogrešnih ljudi što demotiviše.

14. Četrnaesto pitanje se bavi doživljajem zaposlenih vezano za to da li MLJR dovoljno ulaže u njihovu edukaciju i usavršavanje. U velikoj meri njih 6 ili 21% prepoznaje napore MLJR na polju podsticanja usavršavanja veština zaposlenih; umereno te napore prepoznaje 3 ili 10% ispitanika što daje ukupno 9 ispitanih koji su se izjasnili u pozitivnom delu skale. Aktivnosti u cilju podizanja veština i kompetencija radnika njih 9 ili 31% donekle prepoznaje. Ulaganje MLJR u edukaciju i usavršavanje veština i talenata njih 6 ili 21% prepoznaje malo, a nimalo njih 4 ili 17%. Ukoliko nemaju šansu za sticanjem novih poslovnih veština, zaposleni će se nakon što primene na radne zadatke svo svoje umeće osećati manje motivisanim. Ova situacija će dalje voditi smanjenju lojalnosti, što može otvoriti put za traženje novog radnog mesta.

15. Petnaesto pitanje istražuje da li zaposleni prepoznaju vezu dobro osmišljenih načina motivacije sa podizanjem nivoa inovativnosti i kreativnosti. Najveći broj anketiranih, njih 19 ili 66% u velikoj meri prepoznaje vezu dobro osmišljenih načina motivacije i nivoa

inovativnosti i kreativnosti zaposlenih u okviru svoje organizacije, što govori o tome da visoko motivisan zaposleni rado i često koristi svoje talente i kompetencije u svrhu postizanja radnih ciljeva. Dobro osmišljene načine motivacije koji podstiču kreativnost i inovativnost donekle prepoznaje 3 ili 10% ispitanika, dok njih dvoje ili 7% ovu vezu percipira umereno što pruža mogućnost MLJR da aktivnije rade na razvijanju talenata zaposlenih, koji treba da se razvijaju zajedno sa čitavom organizacijom. Spregu dobro osmišljenih načina motivacije i podizanja nivoa inovativnosti i kreativnosti njih 2 ili 7% uviđa malo, odnosno nimalo njih 3 ili 10%, verovatno jer u okviru njihove organizacije ne posmatraju razvoj ovih veština zaposlenih kao strategijski resurs, koji je neophodno podsticati i angažovati.

16. Šesnaesto pitanje ispituje da li zaposleni prepoznaju aktivnosti MLJR da zaposlenima učine radne zadatke privlačnijim? Zadovoljan zaposleni je predan radu, lojalan, odgovoran i produktivan, a to mu treba omogućiti i kreiranjem zadataka na taj način da ne budu jednolični i bez izazova. Najveći broj ispitanih, njih 9 ili 31 % tek donekle prepoznaje napor MLJR da radne zadatke kreiraju na inspirativan i podsticajan način. U velikoj meri ove napore prepoznaje 4 ili 17% ispitanika što govori o tome da oni imaju adekvatne radne izazove u okviru radne organizacije. Izazovne poslovne zadatke u svom radnom okruženju umereno percipira 3 ili 10% ispitanika, što govori da njihovi poslovi nisu jednolični ali da ima prostora za poboljšanje. Menadžment mora biti pažljiv u planiranju radnih izazova, jer osim što su atraktivni oni moraju biti i dostižni da se ne bi postigao kontraefekat demotivacije zaposlenih nemogućnošću da ostvare ciljeve. Možda je i navedeno jedan od razloga koji su 7 ili 24% ispitanih naveli da se izjasne da napore MLJR da zadatke učine privlačnijim malo prepoznaju, odnosno njih 6 ili 21 % nimalo.

4. ZAKLJUČAK

Za MLJR je specifično da osim što su srce razvoja organizacije oni obavljaju kompleksan posao koji zahteva posedovanje znanja i iskustava iz mnogih oblasti kao što su psihologija ličnosti, pedagogija, andragogija ili sociologija rada kao i njihovu konstantnu nadgradnju. Sprovedeno istraživanje pokazuje da s obzirom na to da se široki spektri različitih motivatora zaposlenih ne mogu zadovoljiti na jedan univerzalan način, izbor MLJR u smislu izbora sistema motivisanja zaposlenih, zavisiće od načina na koji su uočene njihove potrebe i problemi sa kojima se susreću. Gotovo jednak broj ispitanika je u pozitivnom smislu odgovorio da koliko će zaposleni biti radno motivisani, kolika će biti njihova produktivnost i kvalitet samog rada, zavisiće od odnosa sa MLJR, dok druga polovina ne deli to mišljenje što je potencijalni izvor problema na relaciji MLJR-zaposleni. Motivacija zaposlenih jeste dugoročan proces ali MLJR ima veliki izbor mogućnosti za motivisanje radnika u cilju ulaganja dodatnih napora, veština i talenata da bi se postigli predviđeni poslovni ciljevi organizacije, što veliki deo ispitanika prepoznaje i vrednuje. Zaključak sprovedenog istraživanja jeste da će radnici pružiti svoj puni radni potencijal srazmerno tome koliko im MLJR omogući izazovno radno okruženje u okviru koga će moći da izraze svoje sposobnosti, a ulaganjem u razvoj radnika i poštovanjem njihovih potreba, kao i pružanjem mogućnosti za sticanje novih poslovnih veština i adekvatnim vrednovanjem zalaganja, MLJR će postići njihovu visoku motivisanost i lojalnost. Analizom dobijenih rezultata moguće je odrediti predlog za održavanje motivacije radnika na visokom nivou - imajući u vidu da nivo motivacije radnika varira (u toku dana, godine, pa i u toku obavljanja istog zadatka), održavanje nivoa motivacije konstantnim se može postići putem čestih ispitivanja nivoa zadovoljstva radnika, radionica, karijernih savetovanja ili individualnih razgovora i konsultacija.

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ANALIZA NIVOVA MOTIVACIJE ZAPOSLENIH U ORGANIZACIJI⁹⁹

THE ANALYSIS OF THE LEVEL OF EMPLOYEES' MOTIVATION IN AN ORGANIZATION

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Sadržaj — U ovom radu smo ispitali nivo motivacije zaposlenih u organizaciji. Nivo motivacije zaposlenih je određen kroz stavove zaposlenih o nivou njihove sigurnosti u organizaciji, pripadnosti organizaciji i samopotvrđivanja. Ciljevi ovog rada su bili da se utvrdi nivo motivacije zaposlenih u organizaciji i da se utvrdi da li se nivo motivacije razlikuje prema posmatranim varijablama. Anketiranje zaposlenih je sprovedeno u različitim organizacijama u Beogradu tokom 2017. godine. Rezultati su pokazali da je nivo motivacije zaposlenih u organizaciji nezadovoljavajući. Takođe, nivo samopotvrđivanja zaposlenih je niži od nivoa drugih indikatora motivacije.

Ključne reči: motivacija zaposlenih, sigurnost, pripadnost, samopotvrđivanje

Abstract — In this paper, we analysed the level of the employees' motivation in an organization. The level of the employees' motivation was examined through the employees' attitudes about the level of their security in the organization, organizational belonging and the level of self-confirmation. The objectives of this paper were to determine the level of the employees' motivation in the organization and to examine whether the level of motivation differs according to the observed variables. The survey of employees was conducted in different organizations in Belgrade during the year 2017. The results indicate that the level of the employees' motivation is unsatisfactory. In addition, it was shown that the level of the employees' self-confirmation is lower than the level of the other motivation indicators.

Keywords: employees' motivation, security, belonging, self-confirmation

1. UVOD

U organizacijama, koje zagovaraju primenu interne marketinške orijentacije, zaposleni se posmatraju kao interni potrošači o čijem nivou zadovoljstva se brine u organizaciji. Pretpostavka je da su zadovoljni zaposleni više motivisani, pa samim time i više posvećeni poslu. Upravo, prema [1] motivacija i zadovoljstvo zaposlenih čine dve od više dimenzija interne marketinške orijentacije. Ovakva orijentacija, kao obrazac ponašanja u

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organizaciji, se zasniva na pronalaženju „načina za dostizanje motivisanog i zadovoljnog zaposlenog čime se smanjuje fluktuacija najvrednijih zaposlenih“ [2: 422]. Istovremeno, odnos između motivacije zaposlenih i njihovih performansi i zadovoljstva poslom intrigira pažnju mnogih istraživača i praktičara u oblasti psihologije, industrijske (organizacijske) sociologije, menadžmenta i drugih disciplina organizacionih nauka kao i (internog) marketinga i poslovne ekonomije.

Ne može se tvrditi da su performanse i zadovoljstvo zaposlenih isključivo posledica rasta njihove motivisanosti za rad. Slično ovome, smatra se da „...povećanje performansi nije uvek direktno proporcionalno intenzitetu motivacije“ [3: 46]. Čak, obrnuto, visoke performanse mogu biti podsticaj (motivator) za veće zadovoljstvo. U [4: 240] se navodi „Visoke performanse, ako su nagrađivane, dovode do zadovoljstva poslom, što zauzvrat olakšava posvećenost organizaciji i njenim ciljevima“. Iako je neosporna važnost motivacije, evidentno je da je otežano utvrđivanje direktne veze između motivacije i navedenih ishoda zaposlenih, zbog složenosti samih kategorija i njihovog međuodnosa koji ne isključuje delovanje drugih faktora. Ipak se pretpostavlja da će motivisani zaposleni više doprineti organizaciji. Od te pretpostavke se pošlo i u analizi motivacije u ovom radu, imajući u vidu da zaposlene nejednako motivišu različiti stimulansi. Sprovedeno je istraživanje nivoa motivacije kao i zadovoljstva motivacijom zaposlenih putem anketiranja zaposlenih u različitim preduzećima u Beogradu.

Rad čini nekoliko delova. U drugom delu je prezentovana motivacija zaposlenih, u trećem varijable motivacije, u četvrtom delu empirijsko istraživanje sa metodologijom, rezultatima i analizom, te zaključak i popis literature.

2. MOTIVACIJA ZAPOSLENIH

Motivacija se, uglavnom, povezuje sa radom i odnosom zaposlenog prema poslu i radnim zadacima. Ovo podrazumeva njegovu spremnost da ih obavi i postigne postavljene ciljeve, čime doprinosi ostvarivanju organizacijskih ciljeva. Imajući u vidu koliko ličnost zaposlenog i okruženje u kojem obavlja svoje radne zadatke, pa i ono u kojem živi, određuju njegovu spremnost i volju za obavljanjem radnih zadataka i ulaganjem napora u interesu organizacije, motivacija se smatra psiho-sociološkom kategorijom. Obično je opredeljena delovanjem unutrašnjih (intrinzičnih) i spoljnih (ekstrinzičnih) faktora.

U literaturi, u [5] se navodi da se teorije motivacije prepoznaju kao teorije koje se bave motivima i one koje se bave procesom. Teorije koje se bave motivima daju odgovor na pitanje šta motiviše osobe na rad. One su fokusirane na identifikovanje motiva. Jedna od najpoznatijih je Maslovljeva teorija hijerarhije potreba. Veza između potreba zaposlenih kao ljudskih bića i njihovog ponašanja u organizaciji, a posebno u vezi sa radom i motivisanošću za rad je utvrđena u mnogim studijama. Teorije procesa, prema samom nazivu, istražuju specifičnosti motivacionog procesa ne uzimajući u obzir analizu potreba, jer se smatra da se one ne razlikuju od osobe do osobe. Značajnije od njih su Vrumova teorija očekivanja i Adamsova teorija jednakosti (pravednosti). Prema teoriji očekivanja, osobe su motivisane činjenicom (očekivanjem) da ako ulože napore, oni će dati rezultat, rezultat će dati nagradu, a ona treba da verifikuje napor, bude vredna napora i poželjna. Na taj način ona daje satisfakciju za uloženi napor. Prema teoriji jednakosti mora postojati srazmera u odnosu uloženi napor zaposlenog i nagrade kao rezultata uloženi napor. Takođe, mora postojati srazmera na relaciji odnosa uloženi napor - nagrada zaposlenog i uloženi napor i nagrade drugih zaposlenih sa kojima se zaposleni upoređuje. Zaposleni očekuje da isti napor bude jednako nagrađen.

Prema [6], stiže su jedan drugačiji pogled na motivaciju čiji je izvor u iskustvu i energiji koja pokreće zaposlenog na angažovanje. Naime, iskustva na poslu koja su u skladu sa očekivanjima koje imaju zaposleni u vezi ispunjenja njihovih potreba određuju radnu angažovanost i ponašanje na poslu [6: 1].

3. VARIJABLE MOTIVACIJE

Posmatrano sa stanovišta (teorije) potreba, svaki pojedinac kao zaposleni zadovoljava potrebe najnižeg nivoa (egzistencijalne), pa se potrebe za sigurnošću (bezbednošću) javljaju kao jedne od niže pozicioniranih nivoa potreba. Zaposleni obezbeđuje, kroz osećaj sigurnosti, egzistenciju za sebe i svoju porodicu. Nakon toga slede potrebe višeg nivoa kao što su potreba za poštovanjem, uvažavanjem, osećajem da je zaposleni važan član organizacije i da na taj način oseća pripadnost svojoj organizaciji, te da u njoj može da se samoostvari i samopotvrđi. Upravo, ove varijable motivacije - sigurnost, pripadnost i samopotvrđivanje čine "osnovne ljudske potrebe članova organizacije..." [7: 357]. Imajući u vidu navedeno, ove varijable su korišćene u analizi nivoa motivacije zaposlenih u ovom radu. Pošlo se i od Maslovljeve teorije hijerarhije potreba i Herbergovog viđenja faktora motivacije.

Imajući u vidu Maslovljevu lestvicu hijerarhije potreba, korišćene varijable motivacije u ovom radu su izrazi potreba za sigurnošću (drugi nivo), pripadnošću (treći i četvrti nivo - u aspektu poštovanja) i samopotvrđivanjem (peti nivo). Herbergovo viđenje [8: 7] faktora motivacije se zasniva na dve vrste faktora, nezavisno posmatranih, a to su faktori koji izazivaju zadovoljstvo tzv. motivatori (intrinzični, unutrašnji) i faktori koji izazivaju nezadovoljstvo tzv. higijenski faktori (ekstrinzični, spoljni). Sigurnost na poslu je higijenski faktor, čijim izostankom dolazi do nezadovoljstva, iako postojanje sigurnosti nije motivator. Pre sigurnosti, Herberg navodi sledeće ekstrinzične faktore: politiku i administraciju kompanije, nadzor, međuljudske odnose, uslove rada, platu i status. U [9] se navodi da motivatori nisu u potpunosti intrinzični, pa prema tome, ne postoji uvek nezavisnost faktora, već njihovo međusobno preplitanje.

Imajući u vidu navedeno, i sigurnost kao ekstrinzični faktor se prepliće intrinzičnim faktorima. Ako zaposleni nije zadovoljan platom (visinom ili dinamikom isplate), pa još nije siguran u radno mesto, manja je verovatnoća da je spreman na zalaganje, usled odsustva navedenih motivatora. Što je zaposleni više siguran u svoje radno mesto, posao i organizaciju, on će vremenom da postaje privrženiji i da razvija pripadnost. Osećaj da je zaposleni poštovan, da mu se ukazuje da je važan za organizaciju i da je neophodan njegov angažman u ostvarivanju organizacionih ciljeva stvara kod zaposlenog osećaj bitnosti i jačanja vezanosti za organizaciju. Vezanost i pripadnost povratno jačaju sigurnost u radno mesto i organizaciju.

Pripadnost se ne može poistovetiti sa posvećenošću organizaciji, ali proističe iz nje. Prema [10: 1] posvećenost (privrženost, odanost) organizaciji počiva na tri komponente: afektivnoj, komponenti kontinuiteta zasnovanoj na troškovima napuštanja organizacije i normativnoj komponenti. Afektivna se manifestuje kroz identifikaciju sa organizacijom; ona izražava nivo emotivne veze zaposlenog sa organizacijom. U uskoj vezi je sa osećajem pripadnosti. Prema Lee, Farth, Chen, 2011 u [11: 121], nesigurnost je osnovni izvor potreba pojedinca da se identifikuje sa organizacijom. Time jača svoju sigurnost, ali i pripadnost organizaciji sa kojom se identifikuje. Druga komponenta posvećenosti (drugi naziv: instrumentalna posvećenost) kalkuliše sa cenom napuštanja organizacije. Ona je rezultat prethodnih izbora, odnosno manifestuje ranije ponašanje. Normativna komponenta se zasniva na moralnoj obavezi da se bude u organizaciji i ostane u njoj. Posvećeni zaposleni smatraju da je najbolji izbor za njih organizacija u kojoj rade, i ovo je rezultat socijalizacije i razvijane vrednosti tokom rada u

organizaciji. Organizaciona pripadnost, se prema tome, može odrediti kao veza zaposlenih sa organizacijom i zavisnost od organizacije; ona pokriva osećaj kod zaposlenog da je profesionalno uključen, njegovu lojalnost i verovanje u organizacione vrednosti. Razvija se kroz tri faze: prihvatanje, usaglašenost i internalizaciju [12: 184]. Nakon što bude prihvaćen od drugih u organizaciji, zaposleni prolazi proces poistovećivanja (usaglašavanja) vrednosti organizacije sa sopstvenim vrednostima koje na kraju prihvata kao svoje.

Potrebe za samopotvrđivanjem predstavljaju potrebe najvišeg stepena, čijim ispunjenjem zaposleni doživljava osećanje da je imao priliku da iskoristi sve svoje potencijale. Kao posledica toga, zaposleni mogu da se osećaju zadovoljnim i ispunjenim, o čemu svedoče brojne studije, što se može videti u [13]. Prema nalazima pregleda 23 studije iz perioda 1962-1973. godina, Berl i saradnici su utvrdili da kako se ide ka gore na Maslovljevoj lestvici potreba, to su one manje zadovoljene, što ukazuje da su sigurnost i samopotvrđenost najmanje zadovoljene potrebe [13: 42], što je bilo predmet provere i u ovom radu (dok su društvene potrebe, prema istom istraživanju, najugroženije).

4. EMPIRIJSKO ISTRAŽIVANJE – METODOLOGIJA, REZULTATI I ANALIZA

4.1. Metodologija

Predmet ovog empirijskog istraživanja je sagledavanje nivoa motivacije zaposlenih u organizaciji koja je posmatrana kroz sigurnost, pripadnost i samopotvrđivanje. Ove tri varijable motivacije su testirane sa po tri pitanja, čiji su odgovori prezentovani u nastavku rada. Ciljevi istraživanja su bili da se kroz stavove zaposlenih, utvrdi nivo njihove motivacije, kao i da se utvrdi da li se nivo motivacije razlikuje prema posmatranim varijablama. Pretpostavka je određena na ovaj način: Nivo motivacije zaposlenih u organizaciji je nezadovoljavajući, a ocenjuje se kao takav ako je zbir procenata odgovora za ocenu 4 i 5 na Likertovoj skali jednak ili ispod 50% od uzorka.

Prikupljanje potrebnih podataka je obavljeno tokom 2017. godine, kada su anketirani zaposleni na teritoriji Beograda putem Gugl Forms aplikacije. Od 100 upitnika, 72 su uključena u analizu. Likertova skala u rasponu od 1 do 5 je poslužila za ocenu datih izjava, idući od opcije „u veoma maloj meri“ do opcije „u veoma velikoj meri“. Struktura uzorka je takva da je nešto malo više žena u uzorku (56%), te ispitanika do 30 godina starosti (53%), ispitanika sa prvim i drugim nivoom akademskog obrazovanja (56%), ispitanika koji su izvršioc i oni sa stažom manjim od 10 godina (72%). Onih sa godinama starosti 31 do 40 je 26%, 41 do 50 je 7% i preko 51 je 14%. Onih sa srednjim obrazovanjem je 15%, strukovnim 17% i doktoratom 12%. Od 11 do 20 godina staža je 10%, a od 21 pa nadalje je 18%.

4.2. Rezultati i analiza: nivo sigurnosti

Struktura odgovora: na pitanje u kojoj meri se zaposleni blagovremeno informišu, brine se za njih i uvažavaju se je prikazana na Slici 1; na pitanje u kojoj meri zaposleni mogu da se oslone na svoj kolektiv je prikazana na Slici 2; na pitanje u kojoj meri zaposleni brinu za svoju budućnost je prikazana na Slici 3.



Samo nešto više od 1/3 zaposlenih (36%) smatra da se, u veoma velikoj i u velikoj meri, blagovremeno informišu, brinu za njih i uvažavaju ih u organizaciji. Značajan je procenat onih koji su nesigurni. Da se, u veoma velikoj i u velikoj meri, mogu osloniti na svoj kolektiv smatra 51% zaposlenih a da se brinu za svoju budućnost smatra 48% zaposlenih. Odgovori na ova dva pitanja su nešto oprečni, odnosno zahtevaju pojašnjenje. Prvo, briga za budućnost je indikator nesigurnosti, pa se u inverznoj postavci, za meru sigurnosti prihvata procenat od 35% zaposlenih (i to onih koji su dali odgovore u opciji „u maloj meri“ i „u veoma maloj meri“). Na osnovu strukture odgovora na ova pitanja, može se zaključiti da najveći doprinos sigurnosti zaposlenih potiče od činjenice da se mogu osloniti na svoj kolektiv, iako je značajan procenat onih koji brinu za budućnost. Dodatna analiza je ukazala da je u opciji odgovora „u veoma velikoj meri“ i u „velikoj meri“ na pitanje u kojoj meri se mogu osloniti na svoj kolektiv učestvovalo 85,7% onih od uzorka rukovodioca, a 43% onih od uzorka izvršioca. Naime, broj odgovora rukovodioca čini skoro 1/3 ukupnog broja odgovora na ovo pitanje pri čemu učestvuju u uzorku sa samo 19%. Može se zaključiti da su rukovodioci pre nego izvršioci oni koji mogu da se oslone na svoj kolektiv.

4.3.Rezultati i analiza: nivo pripadnosti

Struktura odgovora na pitanje u kojoj meri se zaposlenim saopštava da su važan član organizacije/da je njihov rad od velikog značaja za uspeh organizacije je prikazana na Slici 4. Struktura odgovora na pitanje u kojoj meri se menadžeri trude da sagledaju problem zaposlenog iz perspektive zaposlenog a ne iz svoje je predstavljena na Slici 5. Struktura odgovora na pitanje u kojoj meri se zaposleni oseća ravnopravnim članom tima/odeljenja ili organizacije u celini (ima mogućnost da iznese ideje, i da mu se iste saopšte) je prikazana na Slici 6.



Više od 1/3 zaposlenih (38%) smatra da im se, u veoma velikoj i u velikoj meri, saopštava da su važan član organizacije. Da u veoma velikoj i u velikoj meri menadžeri sagledavaju problem zaposlenih iz ugla zaposlenih a ne iz sopstvenog ugla smatra ispod 1/3 zaposlenih (32%) a da

se zaposleni osećaju ravnopravnim članom tima/odeljenja ili organizacije u celini smatra 45% zaposlenih. Visok je procenat onih koji su nesigurni. Najveći doprinos pripadnosti zaposlenih potiče od toga da se osećaju ravnopravnim članom tima ili odeljenja, odnosno organizacije u celini.

Rezultati i analiza: nivo samopotvrđenosti

Struktura odgovora na pitanje u kojoj meri zaposleni komuniciraju sa menadžerom u vezi plana svog ličnog razvoja je prikazana na Slici 7. Struktura odgovora na pitanje u kojoj meri su informisani o tome šta organizacija očekuje od njih u smislu ličnog razvoja je predstavljena na Slici 8. Struktura odgovora na pitanje u kojoj meri su zaposleni informisani o značaju njihovog ličnog razvoja za uspeh organizacije je prikazana na Slici 9.



Malo više od 1/3 zaposlenih (34%) smatra da, u veoma velikoj i u velikoj meri, komuniciraju sa menadžerom u vezi plana svog ličnog razvoja. Da su u veoma velikoj i u velikoj meri zaposleni informisani o tome šta organizacija od njih očekuje u smislu ličnog razvoja smatra 36% njih. Veliki je procenat onih koji su nesigurni. Da su u veoma velikoj i u velikoj meri zaposleni informisani o značaju ličnog razvoja za uspeh organizacije smatra 35% zaposlenih. Takođe je značajan procenat onih koji su nesigurni. Najveći doprinos da se zaposleni osećaju samopotvrđenim potiče od toga da su informisani o tome šta se od njih očekuje na planu ličnog razvoja, ali je i veliki procenat nesigurnih po ovom pitanju.

Analiza nivoa motivacije

Kako je pitanje broj tri kod ocene sigurnosti inverzno, jer se briga za budućnost u velikoj i veoma velikoj meri reflektuje kao pokazatelj nesigurnosti, tako rezultati koji ukazuju na nivo sigurnosti koju zaposleni oseća ukazuju da 41% zaposlenih oseća sigurnost u velikoj i veoma velikoj meri (Slika 10). Rezultati koji ukazuju na nivo pripadnosti koju zaposleni oseća izgledaju ovako: 39% zaposlenih oseća pripadnost u velikoj i u veoma velikoj meri. (Slika 11). Rezultati koji ukazuju na nivo samopotvrđivanja koju zaposleni oseća izgledaju ovako: samo 35% zaposlenih oseća da je u velikoj i u veoma velikoj meri samopotvrđen u organizaciji (Slika 12). Ispitanici su najnesigurniji u odgovorima na pitanja koja se odnose na samopotvrđenost.



Sumarno: da su zaposleni motivisani u veoma velikoj i u velikoj meri smatra 38% ispitanika (Slika 13).



ZAKLJUČAK

Pozitivni ishodi nisu nužno rezultat visoko motivisanih zaposlenih. Istovremeno ne može da se ospori pozitivan efekat motivacije na performanse zaposlenih, njihovo zadovoljstvo i poslovne performanse organizacije. Motivacija zaposlenih može da generiše mnoge ishode kako sa stanovišta zaposlenog (pojedince) tako i organizacije. Imajući u vidu navedeno, u ovom radu se težilo sagledavanju stavova zaposlenih o nivou njihove motivacije u organizaciji. Motivacija je posmatrana kroz tri varijable, a to su sigurnost, pripadnost i samopotvrđivanje. Ciljevi istraživanja su ostvareni: stavovi zaposlenih su omogućili utvrđivanje nivoa motivacije i doprinosa svake pojedinačne varijable motivaciji. Prikupljanje podataka je obavljeno putem ankete koja je prostorno sprovedena u Beogradu a vremenski pokriva 2017. godinu.

Rezultati ukazuju da zaposleni nisu dovoljno motivisani, odnosno da je nivo motivacije zaposlenih u organizaciji nezadovoljavajući: mnogo manje od polovine ispitanika, odnosno tek 38% njih je stava da su u veoma velikoj i u velikoj meri motivisani, a jedna šestina njih nije sigurna u kojoj meri oseća da je motivisana. Najveći doprinos da se zaposleni osećaju motivisanim potiče od sigurnosti, dok su najmanje samopotvrđeni. Ovo je u skladu sa Maslovljevom lestvicom hijerarhije potreba - više su zadovoljene potrebe nižeg nivoa od potreba višeg nivoa. Takođe, rezultat je u skladu sa nalazima analize studija grupe autora koja je preuzeta i prezentovana u [13: 42], i to u domenu samopotvrđenosti koji ukazuju da su zaposleni najmanje zadovoljili potrebe za samopotvrđivanjem.

Analitički posmatrano, zaposleni se osećaju manje sigurnim usled toga što brinu za svoju budućnost (inverzno pitanje), i što nisu blagovremeno informisani, uvaženi, niti osećaju da se za njih brinu u organizaciji. Zaposleni smatraju da menadžeri ne sagledavaju probleme

zaposlenih iz njihovog ugla već više iz sopstvenog ugla, pa je ovo, najlošije ocenjeno pitanje najviše doprinelo smanjenju osećaja pripadnosti. Zaposleni su najmanje zadovoljni merom u kojoj komuniciraju sa menadžerom na planu ličnog razvoja (indikator samopotvrđivanja), mada je kod ove varijable mala razlika u odgovorima u odnosu na ostala dva pitanja. Najviše je nesigurnih u odgovoru na pitanje u kojoj meri su informisani o tome šta organizacija očekuje od njih na planu ličnog razvoja.

Navedeni rezultati ukazuju na područja u kojima organizacije treba da ojačaju napore i aktivnosti radi povećanja motivacije zaposlenih kroz povećanje sigurnosti, pripadnosti i samopotvrđenosti. Preporučuje se dalje istraživanje koje bi ponudilo kvalitativne odgovore o uzrocima utvrđenog (nezadovoljavajućeg) nivoa motivacije. Rezultati ovog rada mogu biti od koristi onima koji se bave empirijskim istraživanjima u ovoj oblasti, menadžerima naših preduzeća, kao i široj čitalačkoj publici koja je zainteresovana za problematiku motivacije zaposlenih.

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NEW JOB POSITIONS AND RECRUITMENT OF EMPLOYEES SHAPED BY BLOCKCHAIN TECHNOLOGIES

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Abstract: *Blockchain as a new tech trend with dynamic development has the real potential to change every industry and company. In this paper are examined the impacts that blockchain has on human resource management – establishment of new job positions and changes in the recruitment process. Application of blockchain technologies in organizations creates not only new technological jobs and positions, but also new jobs and positions in other professions. Due to blockchain technologies, recruitment process will be less time consuming with lower cost and with increased overall quality of recruitment.*

Keywords: *recruitment, new job positions, selection, blockchain*

INTRODUCTION

Throughout the history, technology was the key factor in the organization of working processes and activities of any company [13]. Some of the newest technology trends that shape processes and activities of human resource management are: the internet of things, artificial intelligence, intelligent applications, big data and blockchain [25]. Blockchain is defined as a shared, distributed ledger, that uses a set of nodes to maintain data structure, organized in blocks. There are strong beliefs that blockchain technology will reshape the way businesses are done, as Internet did almost three decades ago [17].

The aim of this paper is to examine how blockchain impacts on appearance of new job positions and recruitment process. The first part of the paper defines blockchain technology and its key characteristics, while other parts of the paper examine the new job positions for working with those technologies and how they impact on recruitment process.

BLOCKCHAIN TECHNOLOGY: DEFINITION AND KEY CHARACTERISTICS

By reviewing the literature, many definitions regarding blockchain can be found. Some of them are very hard to understand, in some are missing the important characteristics of blockchain, while some of them are incomplete. The simplest way to define blockchain is to represent it as a database that consists of a physical chain of fixed-length blocks with N transactions, where each of N transaction added to a new block is validated before insertion [2]. A word „block“ is used to describe record, while blockchain represents a chain of records which are stored across a large number of networked independent computers. In fact, blockchain represents „distributed ledger of transactions implemented as data batched into blocks where each block references

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and identifies the previous block using a hashing function which forms an unbroken chain (blockchain)“ [2, p. 6]. One of the most complete definition states that blockchain is a decentralized database system that contains sequential, cryptographically linked blocks of digitally signed asset transactions, managed by a consensus model [20].

Satoshi Nakamoto got his job by inventing Bitcoin in 2009, the world’s first decentralized digital currency that allows users to transfer funds to each other through a network from any place in the world. Bitcoin and other cryptocurrencies have been launched and stimulated the need for new type of companies which will provide various blockchain services [11].

Blockchain can be observed and analyzed through three different categories, Blockchain 1.0, Blockchain 2.0 and Blockchain 3.0 (see Table 1).

Table 1: Blockchain categories

| Category | Description |
|----------------|---|
| Blockchain 1.0 | Currency – the deployment of cryptocurrencies in applications related to cash. |
| Blockchain 2.0 | Contracts – economic, market and financial applications using the blockchain that are more extensive than simple cash transactions: stocks, bonds, loans, mortgages, titles, smart contracts. |
| Blockchain 3.0 | Applications beyond currency, finance and markets – in the areas of government, health, science, literacy, culture, art. |

Source: Adapted from [21]

Beside Blockchain categories presented in Table 1, there are announces of Blockchain 4.0. Seele platform that promotes unity in the blockchain space with platform that enables cross chain communication and brings harmony into blockchain [16]. Seele is the blockchain platform created to solve the scalability, security and efficiency problems found in current blockchain networks with the final aim to build the Internet of Value for the future [29].

Potential advantages and benefits that can be achieved by adopting blockchain technology have been noticed by many companies [17]. Blockchain has the potential to reshape and completely transform business strategies and operating models of the companies [2], [21]. It can be used to increase efficiency of global supply chains, financial operations, asset ledgers, social networking, human resources, production, research and development, etc. Furthermore, blockchain may be used in activities that are time-consuming, repetitive in their nature and/or involve much human effort and cost [7].

Human resource management may be completely changed and reshaped due to the application of blockchain technology. For that reason, the aim of this paper is to analyze the impact of blockchain technologies on the establishment of new job positions in organizations and recruitment process.

NEW JOB POSITIONS ESTABLISHED DUE TO THE BLOCKCHAIN TECHNOLOGY

Any organization that implements new technologies must have employees with necessary knowledge and skills for working with those technologies [14]. Blockchain technologies require employees which know how to use them in a proper way for specific organization. The process of implementation of blockchain technologies requires leadership, but also various skills of professionals who can develop the appropriate blockchain strategy.

The first thing that has to be done is to identify employees in organization that are interested in new blockchain technology and to consult entire IT team regarding all benefits and implications. Good practices of other organizations are also very useful in the process of implementing of new technologies [22].

Many companies which started to implement blockchain technologies firstly used services from consultancy companies that are established with the purpose to help organizations in those implementations (for example Accenture, IBM, KPMG, Microsoft, Consensys, Chainsmiths) [24]. Other companies that want to do this implementation on their own are aware that forming a blockchain implementation team is a key factor needed for success. It is important to emphasize that knowing blockchain from technological perspective is not enough – it is necessary to know how to apply those technologies in organization in order to create new value [3].

The key job positions that are necessary in organizations that use or plan to use blockchain are [15]:

Blockchain Developer / Engineer with appropriate level of technical knowledge and experience in helping companies to develop blockchain platforms.

Blockchain Project Manager who has the role and responsibility to organize and coordinate blockchain development in organization, and to engage all employees in implementation and usage of those technologies.

Blockchain Designer who is responsible for user interface and visual design of blockchain solutions, with the aim to design user-friendly interface that nurture trust among users.

Blockchain Quality Engineer has responsibility to maintain and ensure all aspects of quality in blockchain development framework according to quality assurance (QA) standards.

Blockchain Attorney / Legal Consultant with the role to examine and analyze all legal questions regarding how activities and processes and conducted, but also to establish new legal framework.

Furthermore, other job positions regarding blockchain technologies appeared. Some of those positions are: Blockchain Tech Researcher / Marketer, Blockchain Concept Developer [18], Blockchain Analyst, Blockchain Research Scientist, Blockchain Architect, Blockchain Backend Engineer, Blockchain Algorithm Engineer, Staff Blockchain Engineer [26]. In some companies exists the position of Blockchain Intern for well-established developers and programmers who want to learn blockchain as new technology [19].

Implementation of blockchain technologies in organizations creates not only many new technological jobs and positions, but also new jobs and positions in other sectors and departments.

Demand for blockchain knowledge and skills is in rise [3]. It is estimated that above 1.500 blockchain startup companies are now looking for new employees, along with a well-established and known ICT companies [9]. Observing the period from November 2015 to April 2018, blockchain jobs have gone by 63% on Indeed, while LinkedIn shows 2.527 search results for blockchain developer jobs in the USA [11].

Job positions regarding blockchain technologies impose that employees can work from home, as a freelancer, or full-time in office [6]. Salaries for job positions that include blockchain technologies are from 10 to 20% higher than salaries offered in a job in companies that do not use blockchain [5].

IMPLICATIONS OF BLOCKCHAIN TECHNOLOGY ON RECRUITMENT OF EMPLOYEES

A few years ago, even imagining a marketplace where candidates could only provide one verifiable set of records to employers was a really hard. With blockchain this can be a reality because those technologies will revolutionize the way candidate data are managed [4].

Verification of candidate information is very time-consuming task in the recruiting process because it can be very challenging to verify all working and education history of the candidate. Using blockchain will allow human resource managers to quickly examine education, working experience and specific certifications of candidates. The recruitment process will be more digital and less paper based [12].

Recruiters which use blockchain have strong and powerful tool that can be used in order to search and integrate at one place all information about candidates [8]:

- Education Verification
- Media and Civil Record
- Professional License Verification
- Employer Credit Report
- Sex Offenders Record
- Local Criminal Record
- Motor Vehicle Record

Blockchain technologies make all employment history available at one place - where candidates have worked, what they have done on their previous jobs, but also their key performance indicators, promotions, reasons from leaving and changing the companies. On that way, the procedure of verification previous employment history and references is much less time consuming and some of the collected and summarized information can be used for talent management and acquisition [1]. Furthermore, this will reduce the risk of fraud while examining candidate's verification [10].

Some of the other impacts that blockchain may has on recruitment process are [23], [28]:
Standardization of career profiles of candidates which consequently improves the quality of resume content;

Easier recording and tracking of career development with QR codes on candidate's profile;
Easier validation of the content of higher quality candidates and transparency - on the one hand for recruiter who knows that gets the most ideal and qualified candidate, and on the other hand for candidate who may be confident that possess the right qualification and skills for the job [27].

Safety of information and data are ensured and there is a minimum or not at all chances of data compromising.

The recruitment process will be less time consuming and cheaper because reduced referencing requirements.

Better overview of potentials for employee mobility during recruitment process (international expenses, tax liabilities, cross-border payments).

Recruiters are not the only ones that benefit from blockchain technologies, but also the candidates. They can manage their profile and entire career using blockchain applications.

CONCLUSION

Blockchain, as a new tech trend with dynamic development, has the real potential to change every industry and company. In this paper are examined the impacts that blockchain has on human resource management – establishment of new job positions and implications on the recruitment process. Some of the new job positions that are established in organizations due to blockchain are: Blockchain Developer / Engineer / Architect, Blockchain Project Manager, Blockchain Designer, Blockchain Quality Engineer, Blockchain Attorney / Legal Consultant, Blockchain Tech Researcher / Marketer, Blockchain Analyst, Blockchain Research Scientist, Blockchain Backend / Algorithm Engineer. Regarding recruitment process, there are many benefits among which are easy verification of candidate information, standardization of career profiles, easier recording and tracking of career development. Consequently, the recruitment process will be less time-consuming, less paper-based, with lower costs, while at the same time recruitment professionals can be more efficient, effective and productive.

Blockchain in the recruitment process is still in development stage, but it is sure that it will have significant effects and benefits for human resource managers and candidates. Any aspect of further investigation of the impact of blockchain technologies on human resources may be of great benefit not only for human resource managers, but also for all employees who work with those technologies or plan to work with them in the future.

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SOFT SKILLS ENGINEERING FOR INFORMATION TECHNOLOGIES PROFESSIONALS

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Abstract: *The development of information and communication technologies at the beginning of the 21st century created a huge labour market that employs experts in this field. In scientific and professional literature, as well as in the daily practice of human resources management and the practice of developing higher education programs at technical faculties, the question on professional (hard) skills needed by the widest range of professionals in the field of information and communication technologies arises. However, scientific research and professional practice focus to a much lesser extent on the issues of development of the so-called soft skills necessary for professionals to achieve the results in this field. During June 2018, managers and professionals in the field of information and communication technologies in Belgrade, Serbia, were interviewed in order to identify the so-called soft skills necessary for employees in the broadest spectrum of information and communication technologies. Based on the analysis of the results, the basic model of the soft skills (core and additional) necessary for employees in the field of information technologies is engineered, as well as the method for developing these skills through workshops.*

Keywords: *Information and communication technologies, professionals; soft skills.*

INTRODUCTION

From the beginning of 21st century, information technologies (IT) are becoming the essential part of everyday life. Business processes rely on information technologies and there is growing need for employees with both extensive and specific knowledge in this area. Nowadays, the widest range of job positions related to IT are emerging on a daily basis, with new or updated job descriptions and job specifications. The question which often arises is how the educational system can follow or anticipate fast technological changes that require new professional competences (*hard* skills). Some of the researchers use the term *technical* skills instead, based on Katz's classification of skills which includes technical, human and conceptual skills [1]. Many universities and colleges are interested in developing programs engineering the *hard/technical* competences that will better align with the future employers' needs.

In building *hard* skills for information technologies jobs, many educational systems and companies are encouraging the students to choose education and careers in STEM (Science, Technology, Engineering, and Math) [2]. In order to prepare the students to choose the STEM education, many countries are building programs for the students to develop an interest for STEMS from early secondary education but also from elementary education, thus securing educated human resources for the future needs [3]. The key in building *hard* skills for

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information technologies professionals is, therefore, laying in the formal educational system, especially in secondary and higher education.

The other important question, that hasn't been completely answered yet, is focused on the issues of so-called *soft* skills required for the professionals in information technologies. There are lots of definitions of the *soft* skills existing today. *Soft* skills are defined as the interpersonal, human, people or behavioral skills needed to apply technical skills and knowledge in the workplace [4]. Hunt simply stated that the hard skills show what we know and the soft skills show we use the knowledge [5]. The researchers from the beginning of the 21st century surveying employers from the information technologies field, realized that in employment of information technologies specialists at the starting positions, the companies emphasized *soft* skills (teamwork, communication, etc.) as even more important than professional (*hard*) skills [6], [7].

SOFT SKILLS FOR INFORMATION TECHNOLOGIES PROFESSIONALS – LITERATURE REVIEW

The main goal of any human resources selection process in order to reach organizational success is getting both qualified and adaptable staff [8], [9]. As it is previously said, *soft* skills are needed for applying technical skills and knowledge, and in information technologies job positions, using the acquired knowledge is of the essence for the success of IT projects. So, it is important to emphasize that the *soft* and *hard* skills are difficult to divide, because they are inseparable in undertaking any project tasks, including information technologies projects.

Even in the 1980's, research showed that some programmers performed better than the others with the similar background, and from the beginning of the 21st century there were efforts in developing a methodology for identifying *soft* skills of the top software developers [10]. Gallagher et al. analyzed essential *hard* skills for IT professionals (programming, etc.) and found out they were crucial for getting a job, but that their value weakened during time and that the *soft* skills were getting importance instead [11].

One study, analyzing *soft* skills for software development job posts on online job portals, stated communication, interpersonal, problem solving and analytical skills, teamwork, organizational skills, fast learning skills, working independently, innovativeness, openness and adaptability to change as the most mentioned in the job ads for software development positions [12]. The other study stated change management, commitment to excellence, communication, creativity, decisiveness, empathy, innovation, leadership, knowledge management, motivation, objective oriented negotiation, personal development, persuasiveness, proactive, problem-solving skills, strategy and planning, and teamwork as top soft skills for the professionals in information technologies [13].

A study conducted in nine US states named various *soft* skills as crucial, such as (in order of relevance): honesty/integrity, attitude, willingness to learn new skills, oral and written communication skills, analytical skills, professionalism, ability to work in teams, flexibility/adaptability, motivation, interpersonal skills, adaptability, creative thinking, organizational skills, etc. [14]. Lavy and Yadin concluded that the shift to *soft* skills was caused by the growing need for IT professionals to communicate with different categories and levels of employees and managers, and the appearance of more large-scale projects gathering various business functions [15].

Mtsweni, Hörne and van der Poll research analyzed relevant *soft* skills for different information technologies job positions and found out that for business analysts the most important *soft* skills were: team player, personal integrity, group work, effective questioning, learning skills, etc., for project managers: listening skills, personal integrity, group work, team player, conducting meetings, etc. for software developers: team player, personal integrity, group work, time management and open communication [16].

All the researchers agree on the importance of *soft* skills for high performance of information technologies professionals at different job positions. Different researches show different importance levels, but it could be stated that the most important *soft* skills, according to current research are: communication, teamwork, analytical skills, problem solving skills, creativity, and willingness to learn.

2. SOFT SKILLS ENGINEERING FOR INFORMATION TECHNOLOGIES PROFESSIONALS

Research methodology

In order to engineer the list of the most important *soft* skills for IT professionals in a wider study focused on overall information technologies, employees and the employees in particular information technologies areas, experienced experts in information technologies were interviewed through semi-structured interviews regarding their attitudes on *soft* skills that are essential for information technologies professionals. Two open questions were raised:

What *soft* skills IT professionals should possess?
Sort these skills in order of significance.

For the purpose of this paper, the answers on these questions were analyzed and the list of the most important *soft* skills was engineered for overall job positions in the field of information technologies in order to enable future in-depth research of a wider sample using the statistical methods.

Sample

In the period of two weeks, from June 4th to June 15th, fifty-five participants from Belgrade, Serbia area: experts in information technologies, IT start-up owners, web developers, software developers, senior programmers, network administrators, etc. with significant professional experience, were interviewed through semi-structured interviews regarding their attitudes on *soft* skills essential for the professionals in the widest range of job posts in the information technologies.

Results and Discussion

Based on the answers the *soft* model of competences for the professionals in the widest range of IT jobs was engineered as presented at Table 1.

Table 1. *Soft skills* model engineered for IT professionals¹⁰⁸

| Core competences | Relevance | Additional competences | Relevance |
|------------------------------------|------------------|-------------------------------|------------------|
| Creativity | 1 | Flexibility | 8 |
| Analytical skills | 2 | Anticipation | 9 |
| Problem finding and solving skills | 3 | Achievement orientation | 10 |
| Teamwork | 4 | Time management | 11 |
| Willingness to learn | 5 | Emotional intelligence | 12 |
| Communication | 6 | Ability to work independently | 13 |
| Working under pressure | 7 | Trust ¹⁰⁹ | 14 |

As it is previously seen, the research at available literature showed the awareness of the defining the basic set of *soft skills* in the field of information technologies with no consensus on the most important ones for the professional success. Nevertheless, the most significant ones are very often the following: communication, teamwork, analytical skills, problem solving skills, creativity, and willingness to learn. The *soft skills* model engineered in this research is not particularly different than the ones stated in the previous research, though the levels of importance are somewhat different, especially regarding creativity, and the inclusion of trust as significant professional (*soft*) competence.

In the second part of the interview, the interviewees in additional remarks stated the necessity of creating programs for developing *soft skills* of information technologies professionals, especially those at the early stage of their careers. As key stakeholders were identified higher education institutions, training and development providing agencies and consultancies, and the information technologies companies themselves.

As the programs for developing soft skills were proposed, and the higher education institutions were suggested as key providers, the authors of this article propose courses and workshops on undergraduate and graduate level for developing *soft skills* of the students in the field of information technologies. The workshops would include case studies, situational and behavioral exercises, role play exercises, simulations, etc. as seen at Table 2.

Table 2. *Soft skills* development workshops¹¹⁰

| Workshop type |
|------------------------------|
| Competitions (Hackathons) |
| Simulations |
| Situational exercises |
| Behavioral exercises |
| Case studies |
| Group presentations |
| Project work |

¹⁰⁸ Source: Authors' findings.

¹⁰⁹ Trust as a competence is established by Platts, J., Tomasevic, V. (2006) *Developing productive relationships in civil engineering*. Proceedings of ICE, Civil Engineering 159, August 2006. Paper 14049. Pp. 132-137.

¹¹⁰ Source: Authors' findings.

Limitations of the study

The sample size was rather small and in the following stages will include wider set of participants which will provide more valid results in order to get a more complete depiction on *soft skills* critical for information technologies professionals.

Implications for further research

The aim of this research was to set a basis for a further study which would include survey and the statistical analysis of surveyed answers; nevertheless, it engineers the model of the most important *soft skills* for information technologies professionals.

CONCLUSION

The question focused on the issues of so-called *soft skills* required for the professionals in information technologies is becoming one of the most important issues of developing the workforce in information technologies industry. There are several attempts to catalogue the most important *soft skills*, stating various but similar competences. After interviewing the managers and professionals in the field of information and communication technologies in Belgrade, Serbia, during June 2018, the basic model of the so-called *soft skills* (core and additional) necessary for employees in the field of information technologies is engineered in order of relevance, as well as the methods for developing these skills through workshops offered at various undergraduate and graduate programs.

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LEADERSHIP AS A SOCIO-PSYCHOLOGICAL PHENOMENON: THE PROBLEM OF LEADERSHIP AND MANAGEMENT IN RUSSIAN PSYCHOLOGY

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Abstract: *This paper considers the key methodological problem in the study of the phenomenon of leadership in Russian social psychology, which is the problem of the relationship between leadership and management (headship), i.e. leadership as a socio-psychological phenomenon of informal relations in organizations and management as a characteristic of formal relations. This paper points to contemporary problems in the study of leadership in Russian social psychology, which are primarily related to different approaches and terminology of leadership and management in relation to Western approaches. Based on the analysis of the leadership - headship problem, it is concluded that it is best for the organization that the head of the organization also has the status of a leader, and we consider socio-psychological characteristics of the head-leaders as crucial for the successful functioning of the organization.*

Keywords: *leadership, headship, socio-psychological characteristics, methodological approach of Russian social psychology*

1. INTRODUCTION

In the Soviet period, the study of leadership was associated with small social groups and was methodologically separated from the phenomenon of management in organizations, which was in fact formal headship or administration, aimed to fulfill ideological goals “from above”, without taking into account interests of the collective. Only in the 90’s psychologists started to distinguish organizational leadership as a special form that differ from leadership in small groups and politics. Nowadays, the psychology of leadership rapidly develops in Russia. However, the concept of “leadership” is still interpreted ambiguously which makes many methodological problems.

2. THE FIRST PROBLEM: LEADERSHIP VS. MANAGEMENT

At the beginning of the 70’s in Soviet psychology scientists opposed the concepts of leadership and management. Leadership was related to the regulation of interpersonal relationships in small social groups while management was related to the regulation of formal relationships in organization. These differences were first described by B.D. Parygin in 1971 [1]. The author understood leadership as “one of the processes of organizing and managing a small social group that contributes to the achievement of group goals in optimal terms and with optimal effect, determined by social relations that dominate in society” [2]

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Table 1: Differences between leadership and management in Russian psychology

| | Management (headship) | Leadership |
|---|--|--|
| field of activity | macroenvironment, he represents the group in wider social systems | microenvironment, intragroup relationships in small groups |
| conditions of occurrence | officially assigned (appointed or elected) to manage the group and organize its activities, under the control of the social structure | arises spontaneously, chosen by the group who give him the right to make decisions in significant situations for the group |
| stability | more stable | less stable, depends on the group |
| regulation of relations in the group | regulates the official relations of the group as a certain social organization; its activities are governed by the relevant legal provisions and duties. | regulates interpersonal relations (socio-psychological) in the group, its activity is ensured by the moral norms |
| social role | mediator of social control and authority, legally responsible for the functioning of the organization, has strict sanctions for subordinates | subject of group norms and expectations that spontaneously form in interpersonal relationships |
| decision-making | complex decisions, mediated by many circumstances | decisions concerning group activities |

This trend of opposing leadership and management came from foreign psychology. The dual meaning of “leadership” noticed C. Gibb in 1969. He believed that leadership is legitimate in cases where the influence of the leader is voluntarily accepted by his followers or shared with the followers. To describe unidirectional coercive influence, S. Gibb proposed the term "headship". Thus, he separated official influence from leadership by several criteria [3]:

Table 2: Differences between leadership and management in Western psychology

| Headship (management) | Leadership |
|--|--|
| supported by the organizational system | spontaneously approved by the group |
| sets group goals based on his professional interests regardless of the wishes of the group | reflects the interests and wishes of the group members |
| while achieving goals it is not mandatory to rely on feelings and group’s common opinion | must necessarily rely on feelings and group’s common opinion |
| social gap between him and the group members | one of the group members |
| receives authority from a non-group source | is given power by the group itself |

This attempt to separate leadership and headship was unsuccessful. The reason for this lies partly in traditional western management theory, where from the very beginning leadership was studied as an organizational phenomenon: the leader was the first person of the organization, its head, occupying a certain leadership position. Therefore, a problem of headship basically doesn’t exist in Western psychology as in Russian psychology we can still find leadership-management separation which causes many methodological problems as it neglects the importance of leadership phenomenon as an integral element of any organization.

3. THE SECOND PROBLEM: LEADERSHIP AS THE INFORMAL SIDE OF MANAGEMENT

In Russian psychology of management there is another popular view on leadership, which also distinguishes leadership and management, but does not oppose them [4]-[8]. This view can be presented as following:

organization → management → headship → (administration and leadership)

This means that in any organization there is a part of the management – a “headship” phenomenon, characterized by the interaction between the head and the members of the organization. It has two types: *formal headship* as a part of the formal structure of the organization (the vertical relationship “boss - subordinates”) and *leadership* as a part of the informal structure (relationship “leader – followers”) [7]. In this regard, the head and the leader have *qualitatively different forms of influence* on the group (organization):

1) The head has the *official power* determined by his position and status, which serve as the main and formal method of influencing subordinates (either along with authority and influence, or besides them) [5], [7]. He mostly uses authoritarian style, requires strict execution of orders and instructions, high discipline and subordination. The lack of trust in subordinates leads to their minimal autonomy and direct control over their activities.

2) The leader has *the ability (power) to influence* group members (followers) by using socio-psychological methods and mechanisms, different leadership styles and situational control in order to find the right approaches in relations with subordinates and to achieve the best results [9]. Therefore, leadership is “one of the mechanisms for *integrating* group activities, when an individual or part of a group plays the role of leader that unites, directs the actions of the whole group, which expects, accepts and supports its actions” [8]. It is the followers that distinguishes leaders from non-leaders [10] with being loyal, not obliged, but willing to obey, and perceiving the leader as “one of us”, “the best of us” [11]. Therefore, leadership is a *cognitive construct* associated with ideas about leadership features and the expectation of their realization in behavior [5]. This resource of influence is informal and is realized through the phenomenon of authority, which is based on personal characteristics of a leader, as qualities of high value to group members, and which are recognized by followers [4]-[5], [11]. The leader becomes a guide to the goals and values preferred by the group members and a behavioral reference in meaningful situations [12]. Therefore, a leadership is *interpersonal phenomenon*, as it includes the value exchange between the leader and his followers [7].

Interpretation of leadership as part of management also came from the West. In the early 70's G. Mintzberg considered leadership as a part of management and used the term “*social leadership*” meaning role or style characteristic of management, which allows expanding the influence of a leader not through traditional administrative methods, but socio-psychological. Combination of these two roles in one person makes the manager effective as it gives him the opportunity to influence the processes of group's self-organization and also to reflect their interests in external institutions [13]. Kotter emphasizes that “leadership provides adaptive or beneficial changes implemented in the company, while the role of management is to ensure the stability and sustainability of the organization” [14]. Thus, different goals require different types of leadership: a formal leader is needed to stabilize an organization, whereas for its development an informal leader is required.

So, nowadays in foreign psychology, the phenomenon of organizational leadership is seen as a synonym to headship, or as a part of it – the social role of the head in the organization. In Russia, either the classical Western view is used: a leader is seen as the first person of the organization, i.e. its head, who occupies a certain leadership position; or traditional Soviet view: leadership is divided into formal (official) and informal (social).

The division of leadership into a formal and informal is applicable to informal groups, as it allows to identify the socio-psychological component of this phenomenon. However, this separation is confusing when considering organizational leadership, especially in large organizations. Formal leadership is usually rigidly structured with established rules and functional relationships and therefore easy to determine, while informal leadership arise from interpersonal relationships with not such a clear hierarchy and therefore difficult to analyze. We cannot always be sure whether the employee submits to the head solely because of his formal official power, or because his authority as a leader. Therefore, the leadership behavior of a manager can be inseparable from the position that he occupies. This happens because of many similarities between headship and leadership [7]: 1) both phenomena represent two sides of a people management, 2) they have identical expression: headship is described as the relation “head – subordinates”, and the leadership with the analogous “leader – followers”, 3) both have the influence in the system of informal (psychological) relations. These common features often lead to management being able to transfer from formal into informal which significantly increases the effectiveness of leadership.

4. THE THIRD PROBLEM: THE “NEW VIEW” ON LEADERSHIP IN AN ORGANIZATION – MANAGERIAL LEADERSHIP

Creating highly efficient organizational structures implies the existence of a new type of leadership – managerial leaders who do not see teams as an object of management, but are capable, leading people, to transform a group of people into self-learning organizations, into a single, holistic, “social organism” [15].

„Managerial leadership” was introduced by J. Yukl in 1989 [16]. It took more than 10 years for this term to appear in Russia, introduced by E.S. Yakhontova in 2002 [17]. Following terms are also used: “organizational leadership”, “leadership in organization”, “leadership in management”, “entrepreneurial leadership” and other [15].

Under managerial leadership, we understand the type of interaction between a leader (head) and his followers (subordinate employees), based on the recognition of the head as a leader by subordinates and effective combination of various sources of power, aimed at solving organizational problems and optimizing intragroup interaction [15]. This is a harmonious combination of effective headship (formal component) and leadership qualities (socio-psychological component) in management activity, i.e. formalized leadership + social leadership. As a manager, he uses his legal powers and status for the effective solution of organizational tasks, and as a leader he uses personal influence on his subordinates.

Managerial leader has more opportunities to effectively manage an organization than just a manager who turns into a manager-administrator or just an informal leader who does not have a status authority. A strong leader, but a weak manager is no better, and perhaps worse, then vice versa. So, an ideal manager for the successful functioning of the organization is one having leadership status. It is one that can effectively combine skillful leadership (personal power) with competent headship (organizational power) as two complementary forces [18].

The effectiveness of managerial leadership is determined by the socio-psychological and individual characteristics of the leader [5]. Socio-psychological characteristics include variety of management styles, flexible management, different roles and methods, situational approach. Among many individual characteristics we have to mention *personal qualities such as*: extraversion (sociability, charisma, cooperation, social proactivity), positive attitude towards others (empathy, understanding, kindness, responsiveness), self-control and self-confidence (conscientiousness, responsibility, accuracy, determination), perspective vision and strategic goal setting (dedication, initiativeness, sensitivity to change, flexibility, ability to learn, innovation, creativity) and *motivational qualities* such as – the need for achievement, the need for power, the need for control, the desire for acceptance, no fear of rejection. These qualities are the social and psychological basics for developing managerial leadership which in fact has to unite „the best of both worlds“ – headship and leadership.

The analysis of leadership and headship concepts and the core features that managerial leader has to have so he could be effective in the organization and social relations in general, is of great importance for social psychology. It is both theoretical and empirical issue because it is essential for developing psychological techniques aimed to identify managerial leaders and psychological methods and trainings aimed to help the individual to develop certain features, knowledge and behavior to become a managerial leader.

5. CONCLUSION

Leadership is an integral part of any civilized society and a key element for the functioning of the organization.

Leadership is a complex socio-psychological phenomenon, based on the informal influence, the use of authority and personal qualities. It is the integral part of management process.

Managerial or organizational leadership is the most effective way of combining formal and informal power to achieve both interests of the organization and of its members. The effectiveness of a managerial leadership depends on socio-psychological, personal and motivational characteristics of a leader.

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LIDERSTVO KAO STREMLJENJE SAVREMENOG DOBA

LEADERSHIP AS ASPIRATION OF THE CONTEMPORARY TIMES

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Sažetak: Vođenje, liderstvo kristališe se kao primarna težnja modernog vremena u svim društvenim sferama. Javljaju se mnogobrojna tumačenja, koja nijesu univerzalna. Nužno je razlikovati istinsko od fiktivnog liderstva. Postoji skladan spoj prirode i obrazovanja.

Ključne riječi: Lideri, determinante, tok, priroda, obrazovanje, istinitost, fiktivnost

Abstract: Leadership crystallizes as the primary aspiration of modern times in all social spheres. There are many interpretations that are not universal. It is necessary to distinguish true from fictitious leadership. There is a harmonious blend of nature and education.

Keywords: Leadership, determinations, flow, nature, education, really, fictitious.

1. PRETHODNE ODREDNICE

Liderstvo (vođstvo) obilježja je težnji savremenih društvenih nastojanja u raznim sferama i područjima: nauci, obrazovanju, ekonomiji, politici, umjetnosti, kulturi i dr. Održavanje vodeće pozicije, posebno s dugoročnog aspekta, znatno je teže u upoređivanju sa dolaskom na ovaj položaj. Konkurencija je mnogostruka na najširem nivou.

Jednoznačno, univerzalno shvatanje i tumačenje liderstva nije primjereno i prikladno. Postoje i raznovrsne definicije pojma, mada naglašavam da nijesam pristalica definicija, s obzirom na kruti, uži, ukalupljeni i šablonski pristup. Razumijevanje vođstva logično različito je za razne grupacije, stratum, ljudi i pojedince. Prema određenim shvatanjima, vođe (lideri) po prirodi se rađaju; dok po drugim liderstvo je proces kojim se uči tokom dugog perioda, ili i života. Pojava (odnosno fenomen) veoma je kompleksna i složena sa svojom rastućom, vrijednošću.

Određena savremena tumačenja liderstvo posmatraju kao centar grupnih procesa i tokova. Ukazuje se na ulogu i značaj lidera kao središta promjena (izmjena, preobražaja, transformacija) u grupnim ili grupacijskim, aktivnostima i djelatnostima. Naredna razmatranja, vođstvo sagledavaju sa aspekta i stanovišta, ličnosti i determinišu pojam kao kombinaciju (konstelaciju, kompoziciju), posebno, obilježja (osobina) koje pojedinac (individua) posjeduje i raspolaže i koje mu otvaraju, šire, polje mogućnosti (i šansi) da ostale usmjerava i vodi, ka ispunjavanju obaveza, radnih zadataka.

Odgovarajuća razumijevanja liderstvo formulišu kao djelovanje, aktivnosti, ponašanje, tj. kao preduzumljivost lidera, za pospješivanje promjena u grupaciji i grupi. Drugačija tumačenja, liderstvo kristališu kao preobražajni, transformacioni proces kojim se drugi akteri

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(„sljedbenici“) podstiču, simuliraju, motiviraju na postizanje viših, jačih, optimalnijih učinaka u upoređivanju sa očekivanjem. Pojedini istraživači i stručnjaci (eksperti), liderstvo objašnjavaju sa ugaonog stanovišta umijeća i vještina, potencirajući sposobnosti, tj. znanje, saznavanje, metode, načine i dr. sa postizanjem efikasnog i efektivnog liderstva u konkretnoj praksi.

Mnoštvo interpretacija samo komplikuje i zamagljuje shvatanje: suštine, srži i dubine procesa, jer svaki istraživač pokušava osvjetljavati stvari, tokove, događaje, fenomene, sa svog horizonta i aspekta [4; 274-275]. Realnost ukupnosti („totaliteta“) objektivne stvarnosti je: da i ne postoje ljudi koji misle na potpuno, apsolutno, istovjetni, monolitni način. Stiče se dojam da su svi analitičari ovog domena i dometa, tj. procesa liderstva i ličnosti lidera u pravu, a u ovome stanju postavlja se neizbježno pitanje: da li je i ijedan autor u pravu!? Jasno je i da je prihvatljivija situacija istraživati fenomen: sa različitim i (dijelom, ili i potpunosti) divergentnim mišljenjima, u odnosu na ostavljanje pojave, dešavanja, fenomena, nedovoljno osvijetljenim i istraženim. Fenomen zahtijeva dalja istraživanja.

2. BLIŽE DETERMINANTE LIDERSTVA

Konkretni, pređzorni i sistematizovani; vođstvo (liderstvo) može obuhvatati sklop činila: 1. proces usmjeravanja i djelovanja na povezane, isprepletane aktivnosti i djelatnosti koje ostvaruje grupa ljudi, ili privredna i društvena organizacija u cjelini; 2. izbor postupaka sa ljudima i zaposlenima u izdavanju radnih naloga, sa preobražajima u aktivnosti i akcijama; 3. umješnost i vještina pokretanja i mobilnosti drugih pojedinaca da se angažuju u postizanju zajedničkih, kolektivnih i širih stremljenja, ciljeva i zadataka; 4. uloga i uticaj koji se djeluje na prihvatanje i verifikaciju pojava i dešavanja kod sljedbenika; izbor ciljeva za grupu, grupaciju i organizaciju (kolektiv), sa radnim (proizvodnim, uslužnim i mješovitim) aktivnostima za njihovu realizaciju i održavanjem, očuvanjem i razvijanjem odnosa kooperacije, poslovno-tehničke i dr. saradnje i timskog rada, u internim, eksternim i povezanim okvirima i dr. [4; 275]. Ovo su samo određene premise, a stvarnost je u mnogome složena.

Liderstvom, shvata se i razumije: opredijeljenost, usmjerenost ka željenim, kreiranim i planiranim ciljevima. Vođe raspoložu sa filozofskom vizijom, „idejama vodiljama“ kao obrisima, konturama, bliže i dalje budućnosti; sposobnošću vještinama i umješnošću da vizije pretoče i prenose na ostale članove (elemente sistema) organizacije; stimulišući ih, motivirajući, na uspješno oživotvorenje u praksi.

Liderstvo, tumači se i kao: vlasništvo, djelovanje i uticajnost. Sačinjava „lepezu“ („spektar“, „dijapazon“) obilježja (osobina) i kvaliteta, koje posjeduje ličnost i mogućnostima da uspješno pretežira uticaj, stvori adekvatne učinke. Ovo ne sačinjava jedino prirodne odrednice (osobine) ličnosti, već i radne aktivnosti i metode (načine) kojima utiče na sljedbenike. Riječ je o specifičnom intelektualnom, duhovnom vlasništvu. Grupacije, ili grupe, ambijent su, okruženje, oblikovanost liderstva. Vođstvom; obavlja se dešavanje, uticaj na grupu pojedinačno (individua) sa zajedničkim i kolektivnim ciljem. „Spektar“ može da konstituiše: mala i manja grupa; veća grupa, ili grupa; velika grupa sa obuhvatom ukupne organizacije; ili konkretna društvena grupa.

Vođstvo (liderstvo) moguće je sagledavati kao tok, proces u čijem odvijanju težište je na (interakcijskoj) povezanosti lidera i sljedbenika. Postižu se djelovanja koja nijesu bazirana na sili i prinudi, prilikom svjesne i razumske koordinacije i usmjeravanja grupnih akcija, ka određenim vrednosnim ciljevima i glavnim projektovanim zadacima. Kanališe se energija i volja zaposlenih primjenjujući: komunikativnost, motivisanost, (organizacionu i širu) kulturu i

dr. sredstva izvan okvira prinude. Vođstvo je kompleksno shvaćen proces sa nastojanjima ostvarivanja ključnih promjena, izmjena i transformacija. Liderske aktivnosti su mnogostruke po: obimu, strukturi, vrstama, determinantama, primjenjivanom metodu. Liderstvo, složen je i obuhvatan sklop, multidimenzionalni proces i fenomen, koji nije dovoljno, naučno osvjetljen i istražen. Lidera shvatamo kao: čovjeka, pojedinca, osobu, koja djeluje, aktivno utiče na ostale članove. Oblikuje i formira: projekciju, koncepciju i strategiju organizacije koja je podsticajna, stimulativna, motivaciona, i atraktivna za zaposlene u privrednom subjektu (preduzeću, kompaniji, korporaciji). Sljedbenici, osobe su prema kojim je upravljeno, usmjereno, orijentisano liderstvo. [4; 275-276] Okvir (gabarit) sljedbenika (u domenu primijenjene tehnike i tehnologije) uključuje: imitatore (također na tržištu); modifikatore (kasnije nastupa na tržištu); kao i ostale, isprepletene činioce. [5; 476].

Karakteristične odrednice lidera (vođe) u sintetizovanom obliku i vidu su mnogostruke: prirodne osobine, nadarenost, pamet (um, razum), kreativnost; obrazovanost, usavršavanje i tehničko-tehnološka znanja i saznanja; fizička spremnost i zdravlje, rasuđivanje; etičnost (moralnost, principijalnost, čast, poštenost); unutrašnja energija; istrajnost, (upornost, čvrstina karaktera); taktičnost (suzdržljivost); efikasnost i efektivnost (uspješnost) u generisanju transformacija i upravljanju promjenama; djelovanje i uticajna razvijanje motivisanosti, rad i angažovanje, drugih ličnosti, grupa i grupacija, timova, kolektiva i šireg društva. Jasno je da ovim nije iscrpljena lista (spektar) svih posmatranih karakteristika vođstva. Tumačenje izlazi i izvan kalupa.

Konkretnijom razradom, lider nužno treba da posjeduje određene odrednice: 1. vizionarstvo (smislaona i razumska filozofska, podsticajna, motivatorska, vizija budućnosti koja se oblikuje i sačinjava sastavni faktor egzistencije i rada vođe i transferiše se na ostale članove društvene i privredne organizacije, sa motivacijom stvaranja i održivosti konkurentskih prednosti); 2. „uzor“ zaposlenima (usklađivanje riječi i djela sa primjerom uspješnog zaposlenog); 3. samosvjesnost i cjelomudrenost (poznavanje sopstvenih jačih i slabijih strana, realnih sposobnosti za kontrolisanje i upravljanje samim sobom, kako bi upravljao i drugima); 4. svjesnost sagledavanja tekuće stvarnosti (za osmišljavanje budućih pravaca i smjerova neophodno je poznavanje prošlosti i sadašnjeg stanja); 5. kreator promjena (preobražanje, sopstvene su mogućnosti za postizanje preimущества na konkurencijom i vršenje upravljanja transformacijama); 6. kontinuirano učenje (vođe, primorane su na konstantno učenje i usavršavanje vlastitog znanja, a individualni i timski rad i učenje omogućavaju liderima misaone aktivnosti na razvijanje, novi i fleksibilni način); 7. moralnost, etičnost (društvena kao i dodatna ekološka odgovornost i motivisanost koja vodi dugoročnim i posebno finansijskim učincima); 8. komunikacija (izgrađivanje međuljudskih odnosa, prenošenje poruka, informacija, nastajanje i održavanje, organizacione, komunikacione, mreže, činilac je uspješnosti i sa razvijanjem vještina pisanja, govorenja, slušanja, verbalnih efekata, neverbalnih znakova i dr.); 9. pozitivizam (pronalaženje poboljšanih i novih mogućnosti u odgovorima na pitanja i probleme u realnom optimističkom i pozitivističkom pravcu i duhu mišljenja i djelovanja, formiranjem moći uticaja kao snažnom silom koju slijede članovi određenog vida organizacije); 10. entuzijazam (rast životnog entuzijazma sa istinskim vjerovanjem i u rad i govor, za realizovanje projektovanih i koncipiranih ciljeva, zadataka, sredstava); 11. Cjelovitost obuhvata problema i odlučnost (ispravno posmatranje razlikovanja organizacije kao ukupnosti od tokova, procesa, dešavanja, elemenata, uzroka i posljedica, praćeno, umjesto oklijevanja, efikasnim i efektivnim, energičnim, donošenjem pravilne i blagovremene odluke); 12. upornost u radu i učenje na greškama (promašajima, previdima, propustima). [4; 276-277]

Moć ljudi, moguće je posmatrati kao: nadarenost, sposobnost, potencijal, kapacitet i dr. za postizanje djelovanja i uticaja. Djeluje se na: vjerovanja, ponašanja, aktivnosti, procese, postupke, procedure, tehnike, ostalih članova organizacije. Pojam iskazuje prevashodno kvalitet a kvantitativno veoma teško je mjerljiv, ili i nemjerljiv.

Povezano sa ovim; inteligencija, pokušava se kvantifikovati (mjeriti) koeficijentom inteligencije. [6; 89-92] Ali, ukupni intelektualni i duhovni potencijal čovjeka objektivno nije moguće iskazati jednostavno brojčano (cifrom) kako se u praksi pokušava.

Moć pozicije i položaja sačinjava sklop tj.: legalnost, legitimnost, djelovanje, nagrađivanje, silu i prinudu. Ovu moć lice posjeduje na adekvatnom radnom mjestu, aktivnostima i djelatnostima u formalnom sistemu organizacije. Generalni direktor (menadžer), zamjenici, pomoćnici i rukovodioci, šefovi, na raznim hijerarhijskim nivoima posjeduju višu moć, na bazi svog položaja u organizaciji, od ostalih zaposlenih. Lična moć zasniva se na: autoritetu, stručnosti, znanju, saznavanju, etičnosti, pozitivnim osobinama čovjeka, kao ličnosti. Kod pojedinih organizacija postoji i tzv. „siva eminencija“ tj. ličnost koja postiže presudni uticaj u kolektivu (čija se riječ poštuje) mada formalno nije na čelnim, upravljačko-rukovodećim, liderskim, pozicijama.

Kod ovog obuhvatnog sklopa pitanja nužno je imati u vidu: realnu i (ili) fiktivnu moć. Govori se o liderstvu i kao mogućoj, fiktivnoj, virtuelnoj, tj. lažnoj moći. Legitimna moć slijedi iz položaja formalnih i formalizovanih ovlašćenja i nadležnosti. Nastaje na podlozi pozicije u sistemu (sistemski pristup) i strukturi organizacije. Moć nagrađivanja proizilazi iz sposobnosti i mogućnosti osobe da nagrađuje druge pojedince. Zaposleni u organizacionom sistemu, kolektivu potčinjavaju se volji, htjenjima i nalogima drugog lica iz razloga ostvarivanja korisnosti (prestiz, novac, napredovanje, pozitivna ocjena radnih rezultata, dobijanje prihvatljivih i unosnijih poslova i radnih zadataka i sl.). Moć prinude bazira se na pravu, privilegiji i mogućnostima vođe da upravlja, usmjerava, kontroliše i sankcioniše rad ostalih članova institucije (ustanova) i kolektiva. Zaposleni, prilagođavaju se ovoj moći iz bojazni od nepovoljnih reperkusija za neposlušnost (i neizvršavanje naloga). Moć prisile slijedi iz nadležnosti i ovlašćenja da se: „pomjeraju“, suspenduju ili degradiraju zaposleni; donose mere rasporeda na neželjene poslove; kao i prestanku rada.

Referentna moć formira se na bazi: prihvatljivih sposobnosti, resursa, izvora, ličnih obilježja koje karakterišu vodeću osobu. Moć na bazi „referenci“ oblikuje se kao efekat: želje, volje, divljenja, „uzora“ ostalim pojedincima, da budu nalik na ovu ličnost.

Stručna moć temelji se na: znanju, saznavanju, ekspertnosti i proizilazi iz raspolaganja posebnim i specifičnim znanjem, vještinom i umijećem određene osobe. Uža specijalizacija poslova i radnih zadataka uzrokuje konstantno zavisniju poziciju upravljačke menadžerske strukture od stručnjaka. Zaposleni koji raspolažu specijalnim znanjima, saznanjima i umijećem od ishodišne važnosti za rad i privređivanje organizacije, posjeduju viši stepen organizacione i stručne moći. Moć vizionarstva, i kreacije, generisanja ideja, ideja („zvijezda“) vodilja, idela, motiva, sagledavanja dugoročnih perspektiva i horizonata rada i organizacije, presudnih je odrednica. [4;278]

Cjelokupna moć jedne ličnosti kumulativ je oblika i vidova moći kojom pojedinac može da raspolaze. Bitan činilac prestiža, rangiranja i moći direktorskog i menadžerskog položaja u sistemu organizacije predstavlja: zakonitost, formalno pravna regulativa, legalnost, legitimnost.

Moć u cjelini, može biti pojačana, ili erodirana posredstvom: ekspertske moći; usmjeravanja; sistema nagrađivanja ili sankcionisanja i sl.

Tok i proces liderstva, djelovanja, uticaja na druge pojedince nužno treba da bude zasnovan na prikladnim, primjerenim, efikasnim i efektivnim mehanizmima i instrumentima. Silu, prinudu, manipulisanje, pritiske, ucjenjivanje; nužno je minimizirati i uklanjati. Primoravanje na određeno ciljno ponašanje dovodi do: erozije i gubljenja radne energije, stvaranja pasivnog odnosa prema radu i radnim obavezama; a ne do predviđanog, očekivanog pozitivnog napora, truda, na realizovanju postavljenih poslovnih stremljenja, ciljeva i zadataka. Deformacije i manipulacije zloupotrebavanjem i iskrivljavanjem: podataka i informacija, znanja, „harizme“, ranga, imidža i dr. dovodi do negativnih učinaka. Teži se stvaranju povoljne „klime“ u kolektivu.

Vođstvo, liderstvo, širi je i kompleksniji pojam od primjene moći. Pretpostavlja adekvatno poznavanje: ponašanja i reagovanja osoba u raznovrsnim stanjima i situacijama; motivaciju, podsticaje, stimulatvost; komunikaciju; humanost; osjetljivost na procese i dešavanja u privrednom subjektu (preduzeću, tehno-ekonomskom sistemu) kao složenom, ili integrisanom sistemu (kada primijenimo, sistemski pristup).

Liderstvo i menadžment [3; 53-67], dva su različita kvaliteta, međutim i komplementarna sistema aktivnosti i djelatnosti, sa sopstvenim determinantama i funkcijama. Vođstvo i menadžerska struktura neophodni su činioci za: postizanje uspješnosti privređivanja privrednog subjekta, sistema, kompanije (korporacije) i šire; u uslovima i okolnostima rasta složenosti, kompleksnosti i dinamike privrednog (poslovnog) ambijenta (sredine, okruženja). Postoje različitosti između liderstva i menadžmenta, koje je moguće klasifikovati i prikazati na usklađen, sistematizovani način.

a) liderstvo je sučeljavanje i proces upravljanja promjenama i transformacijama; menadžment je suočavanje i upravljanje složenošću i kompleknošću; b) liderstvo podrazumijeva vođenje organizacije konstruktivnim promjenama i preobražajima, započinje kreiranjem pravca i razvijanjem filozofske i organizacione vizije budućnosti, sa pratećim projekcijama, koncepcijama i strategijama, koje dovode do nužnih promjena za ostvarivanje vizije, ideje ideala, motiva; menadžment, otpočinje planiranjem i raspoloživošću sredstava (budžetiranjem), utvrđivanjem budućih ciljeva i kasnijom razradom faza i etapa (iteracija) za postizanje planiranih aktivnosti; v) liderstvo formira pozicioniranje i povezanost u grupu, grupaciju, tim, koaliciju, za ostvarivanje vizije, komuniciranjem na svim i do najnižih nivoa; menadžment formira mogućnosti i sposobnosti oblikovanja odgovarajuće organizacione strukture i angažovanja ljudi i kadrova, za realizaciju postavljenog plana; g) liderstvo, zasniva se na motivisanosti, pospješivanju, podsticajnosti za kretanja u ispravnom pravcu i smjeru, saturacijom bazičnih ljudskih potreba za postizanje pripadnosti kolektivu, uvažavanja, reputacije, samokontrolisanja; menadžment, bazira se na rešavanju i prevazilaženju problema, dilema, pitanja i kontrolisanju; d) liderstvo, najviši je („piramidalni“) vrh (visina) duhovnih, intelektualnih, vizionarskih, idejnih, ideoloških, organizacionih, djelujućih i dr. sposobnosti; menadžment, tok je odvijanja i izgrađivanja upravljačko-rukovodećih, kao i širih, preduzetničkih, aktivnosti i mjera, odluka; umješnosti, vještine, rutine. [4; 279]

Poseban značaj razvijanja je: privrednog ambijenta („klime“); zdravih, stabilnih međuljudskih relacija; modernije, organizacione, tehničko-tehnološke i radne kulture.

Postoji (težak i „trnovit“) put od: menadžera do lidera. Ističu se, u literaturi, postupnosti, faze i etape u ovom procesu: 1) početkom karijere lideri sa potencijalima vođe stiču iskustvo na

funkcionalnim programima i projektima, međuregionalnu orijentaciju, sučeljavanje sa širokom „lepezom“, raznovrsnih poslovnih stanja i situacija (osnivanje poslovnog subjekta, rast, razvoj, uspješnost i dr.); 2) osobama sa visokim, vodećim potencijalima i kapacitetima omogućava se nužno položaj u grupi, ili timu viših i „top“ menadžera (uključujući šefove i rukovodioce); sticanje iskustva sa spoljašnjim činiocima (ulagačima, kupcima, marketingom i dr); dobitan značaja u upravljanju procesima prestrukturiranja, integracija i dr.; 3) pred promovisanjem u lidersku poziciju, ličnosti neophodno je upućivati na direktorske i glavne menadžerske programe i projekte u pogledu sposobnosti (poboljšavanja organizacije i privrednih procesa, prelaznog, „tranzicionog“ menadžmenta, dizajna, izgrađivanja spoljnih komunikacionih i dr. povezanosti i „mreža“); 4) novog lidera privrednog subjekta racionalno je, početno, postaviti u organizacionim djelovima koji su manji, posebni i progresivni, gdje je radno angažovana sigurna, pouzdana, sposobna struktura (grupa, tim), od kojih se moguće učiti i naučiti; 5) bitna je pomoć i podrška kolektiva, zaposlenih i menadžmenta, usklađenost rada sa etičkim i legalnim postulatima i sve za održavanje lidera na vodećoj poziciji kao i teže od dolaženja na položaj i dr. [4;279-280; 2;368-369].

Efektivnost (lidera) tumači se kao: „rad na pravim stvarima“; a efikasnost (menadžera) kao rad „pravih stvari na pravi način“. Ali; ovo jedino se relativno tumačen!

Postoje velike promjene za lidere na funkciji integrisanja kolektivnog znanja grupa i timova za učenje novog umijeća i vještina, oblikovanja „mentalnih struktura“ lidera privrednih subjekata (preduzeća). Ističu se sljedeće ključne promjene: 1. vizionar-kreator; oblikovati filozofsku i upravljačku viziju i primenivati se u privredno i društveno praksi; 2. spekulista-generalizator; shvatati i razumijevati „mentalne“ instrumente, modele za primjenu kod važnih poslovnih funkcija i razvijati prostore za evaluaciju vođe; 3. analitičar-integralista; t integrirati kolektivno znanje međufunkcionalnih grupa i timova i sačinjavati adekvatna uravnoteženja, balanse, kod otklananja organizacionih problema i dilema; 4. strateg-operator-taktičar; prebacivati se sa opšteg domena i trenda na detalje i obratno, posmatrati važne gabarite u kompleksnom okruženju, imati snage i moći predviđati i djelovati na reagovanja važnih spoljašnjih aktera; 5. arhitekta-građevinar; razumjeti i tumačiti načine analiziranja i dizajniranja sistema organizacije, tako da se projekcija, koncepcija, strategija, struktura, operativni metodi, modeli i umijeća, taktičke mjere, uklapaju efikasno i efektivno, koristiti ova saznanja za oblikovanje nužnih organizacionih preobraza; 6. planer-otklanjač problema; uočavati probleme na koje nužno je koncentrisanje organizacije, shvatati, razumijevati i tumačiti pitanja koje nije moguće funkcijski grupisati i klasifikovati, a od krupnog su značaja; 7. borač-političar-diplomata; aktivno kreirati okruženje u kom organizacija postoji i privređuje, djelovati na važne spoljašnje učesnike (vladu, nevladine organizacije, ulagače, marketing i dr.); 8. uloga vođstva-član tima; naglašavati neadekvatna ponašanja, vlastitim primjerima učiti komunikaciju sa većom i velikom grupom i motivisati ove grupe neposredno i (ili) posredno i kombinovano; 9. nalogodavač-instruktor; pronaći optimalnu mjeru odnosa naloga i sugestija, savjeta (uputstava) za poželjan rast, motivaciju i poslovnu „klimu“ zaposlenih i dr. [4; 279-280] Ali; kruti, šablonski, kalupski monopolizam i nije realan!

Vodeći procesi pretpostavljaju uticaj na grupe i timove u svrhu postizanja ciljeva; različito, ali i povezano. Kad su dinamičnije promjene i krize teže, liderstvo: kao proces upravljanja promjenama neophodnije je u odnosu na uravnoteženije uslove, u privredi, državi i društvu. Govori se i da je: premalo vođa (lidera), a isuviše menadžera. Razvijaju se različite (raznovrsne) teorije liderstva (karakternih obilježja, „biheviorističke“, situacione, determinantne, generičke); nova, polazišta i koncepcije.

Aktivnosti liderstva (sintezom) usmjerene su u ovim domenima i dometima: a) trasiranje pravca (razvijanje vizije često udaljene budućnosti i realizovanje nužnih promjena za ostvarivanje vizije); b) usmjeravanje ljudi (proširivanje informacija o postavljenom razvojnom pravcu na sve aktere neophodne za saradnju, da bi se djelovalo na formiranje, grupa, grupacija, timova i koalicija za shvatanje i razumijevanje vizije i proizilazeće strategije i njihovog prihvatanja kao validnih aktivnosti); v) motivisanje i podstizanje (pospešivanje ljudi da prevazilaze najteže birokratske i političke barijere, kao i prepreke povezane za sredstva i izvore, koje se isprečavaju u kretanju ka promjenama, ostvarivanjem osnovnih i češće nesaturisanih ljudskih potreba; g) obezbjeđivanje preobražaja i do „lomovitih“ dometa sa potencijalima za postizanje visoke korisnosti (poboljšane i nove relacije sa zaposlenima, savršeniji i novi proizvodi, savremeniji marketing, podizanje konkurentnosti i dr.); d) nepokolebljivost na „trnovitom“ putu (sa neizvjesnostima, rizicima privrednog, društvenog, okruženja i dr.).

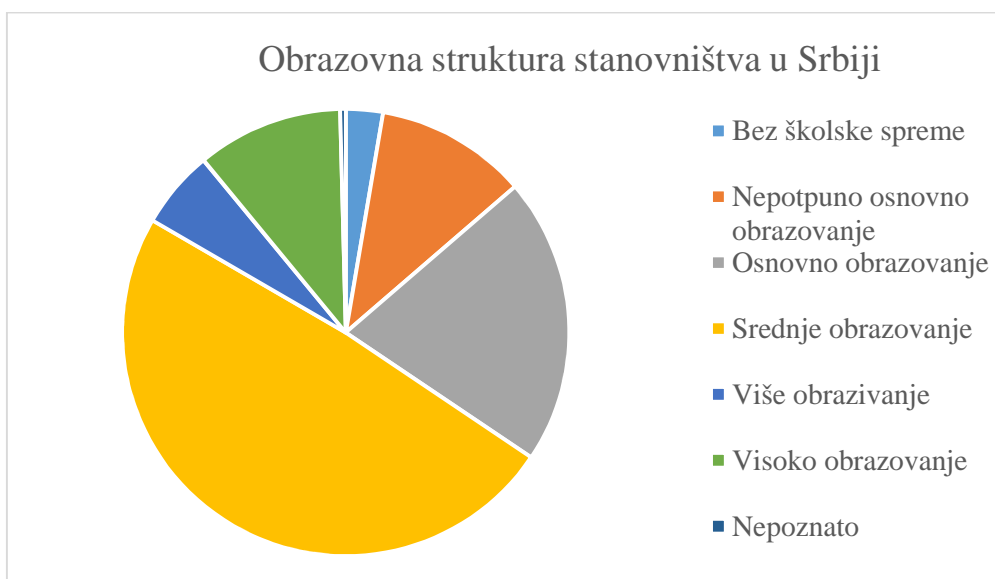
Bitne aktivnosti menadžmenta (sintetički) upravljene su u, ovim, domenima: 1) planiranje i izrada okvira budžeta (preciziranje vremenskog gabarita i detaljnih koraka, iteracija, za postizanje nužnih učinaka i raspoređivanje resursa potrebnih za realizovanje učinaka); 2) obezbjeđenje kadrova i organizacije (utvrđivanje strukture ljudi i kadrova za izvršavanje planskih ciljeva i zadataka, prenošenje, delegiranje, nadležnosti i odgovornosti, ostvarivanje postupaka, procedura, tehnika kao instrukciona podrška osoblju i postavljanje sistema i metoda za praćenje realizovanog i planiranog i plana); 3) prevazilaženje problema kontrolisanja i vođenja (sagledavanje efekata i odstupanja od planiranih zadataka, organizovane i planske aktivnosti u cilju otklanjanja teškoća i problema); 4) određeni nivo predvidivosti, očekivanog, rada i reda, posjedovanje potencijalnih mogućnosti za kontinuirano realizovanje rezultata u kratkom i kraćem periodu, koji su ciljni i svrsishodni za interesne grupe i grupacije, sa stanovišta sudionika (akcionara, tj. poslovanja u budžetskim gabaritima, kupaca i dobavljača, tj. blagovremenog i urednog izvršavanja obaveza i dr.); 5) operativno-taktičke djelatnosti (održavanje, stabilnog rasta, izvlačenje iz, poslovnih, gubitaka i dr.). [4; 281]

3. LIDERSTVO I OBRAZOVANJE

Postoji logička povezanost između obrazovanog kadrova i liderstva; mada ovo nije obavezna, pravilnost, imajući u vidu i prirodne predispozicije ličnosti.

Tabela 1. Obrazovna struktura u Srbiji (prema raspoloživom stanju popisa, 2011.): [7; 40]

| Red./br.: | E l e m e n t i | B r o j | Struktura (%) |
|-----------|-------------------------------|-----------|---------------|
| 1. | Bez školske spreme | 164.884 | 2,68 |
| 2. | Nepotpuno osnovno obrazovanje | 677.499 | 11,00 |
| 3. | Osnovno obrazovanje | 1.279.116 | 20,76 |
| 4. | Srednje obrazovanje | 3.015.092 | 48,93 |
| 5. | Više obrazovanje | 348.335 | 5,65 |
| 6. | Visoko obrazovanje | 652.234 | 10,59 |
| 7. | Nepoznato | 24.424 | 0,39 |
| 8. | Sve ukupno (1+7): | 6.161.584 | 100,00 |

Grafikon 1. Obrazovna demografska struktura stanovništva prikazana i metodom grafika:

Kristališe se nepovoljna obrazovna i kvalifikaciona struktura u Srbiji. Posebno; lica sa visokim obrazovanjem neadekvatnog su formativnog, strukturnog učešća. Formiranjem visokoobrazovanih, stručnih, kadrova (koje prosječno traje 20 godina, ali i duži, ili i doživotni period) oblikuju se bitne pretpostavke za prerastanje kadrova u vođe (lidere), u raznim oblastima ljudske djelatnosti (države i društva; ekonomije, politike, nauke i obrazovanja, zdravstva, kulture i dr.). Izdvajanja za nauku i naučnoistraživački rad u Srbiji, su nedovoljna (prema pojedinim dostupnim pokazateljima, izdvaja se 0,5% BDP-a, komparativno u privredno razvijenim zemljama, 3%). Isto tako; za obrazovanje u Srbiji izdvajaju se neadekvatna sredstva (3,3%, ili 4,5 % obuhvatom segmenta finansiranā od strane lokalne samouprave i pokrajine; dok u zemljama Evropske unije izdvaja se 6%). Posljedično znatan broj ljudi i stručnjaka napušta Srbiju (za prethodnih 20 god. Zemlju napustila je armija od blizu 100 hiljada lica). [1; 92] Intenzivnijim ulaganjima u nauku i obrazovanje nužno je u kontinutetu vremena poboljšavati nepovoljnu, naučnoobrazovnu i kvalifikacionu strukturu u Srbiji!

4. ZAKLJUČNE KONSTATACIJE

Lideri; u domenima privređivanja, nužno upravljaju promjenama i prilagođavaju se privrednom, poslovnom okruženju. Smatra se da je uspješnost privrednog subjekta odraz vodećeg (prvog) čovjeka. Ovdje; nema se u vidu formalno, već „srž“, sadržajno i suštinsko liderstvo. Privredni lideri nastoje da subjekat (kao i svaki poslovni segment) bude pri vrhu, ili vodeće, na tržištu. Odvija se preobražajno, „transformaciono liderstvo“. Vizija; ideje, od ishodišnog su i prevashodnog značaja. Tako isto; nije dovoljno biti vodeći jedino na domicilnom prostoru i tržištu, ali je ovo osnova! Teži se prodornosti, probitačnosti u: inovacijama, inovacijama i nastupu na domaćim, regionalnim i interregionalnim tržištima, kao i globalnom tržištu. Mogući su u ovom domenu, raznovrsni, svrsishodni koncepti, programi i projekti (prestrukturiranje, reinženjering, strategijski preokreti, kvantitet, kvalitet, struktura, biznis, „akvizicije“ i dr.). Koriste se najkvalitetnije sposobnosti („performanse“) ljudskog i kadrovskog potencijala. Pored ovog; nužno je koncentrisanē (fokusiranē) i na probleme i pitanja zaposlenog osoblja u organizaciji. Vođe ispunjavaju obaveze (djeluju na kolektiv, dijele vrijednosti subjekta, korporacije, omogućavaju finansijske i ostale ekonomske i dr. efekte). Nužna je, u ovome: energija (i energičnost); ideje („zvijezde“) vodilje, ideali (ideologija), motivacija, odlučivanje, učinci. Izbor vođe utiče na uspješnost organizacije različitih oblika i

vidova (procentualno, govori se o uticaju od 15%, ili i više), ali ove učinke nije moguće precizno numerički kvantifikovati! Tvrdi se da promjena lidera, tj. generalnog direktora (i preduzetnika), ili najvišeg („top“) menadžera postiže rezultat kao uslovi (i njihova izmjena) u grani djelatnosti odgovarajuće organizacije. Ali; ovo može biti pretenzivo i preuveličano stanovište!

Lideri; po prirodi se rađaju, kao i liderstvo uči se tokom života. Vođstvo, svjevrsni je spoj prirode i obrazovanja (škole). Obrazovanje, od posebnog djelovanja je na oblikovanje i formiranje lidera; ali nije jedini faktor, jer postoje osobine koje se ne uče školovanjem.

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IMPLIKACIJE ZAVESTNEGA VODENJA

IMPLICATIONS OF CONSCIOUS LEADERSHIP

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Povzetek: *Zavestno vodenje je novejši konstrukt, o katerem še ne vemo veliko, se stalno razvija in se intenzivno raziskuje. Načinov učenja, kako postati dober vodja, je veliko, sami pa potrebujemo poiskati tisti način, ki nam najbolj ustreza. Večina vodij že ima izoblikovan svoj stil vodenja, ki ga pogosto lahko povežemo z njihovim načinom življenja. Pravi zavestni vodja se mora zavedati svojega položaja in svojega poslanstva, ter mora strmeti k temu, da se vsakodnevno izobražuje, dela na svoji zavesti, izoblikuje svoj življenjski kontekst, poskuša zaznavati informacije iz okolice, se uči iz življenjskih izkušenj, ter pozorno spremlja vso dogajanje okoli sebe. Pri zavestnem vodenju se moramo najprej samozavedati, imeti moramo sistemski vpogled na celotno dogajanje, z zavestjo moramo biti pri stvari in graditi na kolektivni zavesti. Zavestno vodenje je način življenja, katerega gradimo leta in leta. Dober zavestni vodja je tisti, ki se vsakodnevno uči in izboljšuje do konca svoje kariere, ter želi pustiti svetu nek pozitiven pečat. Preučevali bomo, kaj vpliva, ter kako vpliva na raven zavestnega vodenja, ter kako lahko postanemo dober zavestni vodja. To bomo dosegli s kritičnim pregledom sekundarne literature in s sintezo relevantne literature, v kateri je obravnavana omenjena tematika, ter pojasnjeno ožje znanstveno področje zavestnega vodenja in vpliv zavestnega vodenja na sledilce v organizacijah. Oblikovali pa bomo tudi konceptni model zavestnega vodenja.*

Ključne besede: *Zavestno vodenje, organizacija, management, zavest, konceptualizacija, implikacija.*

Abstract: *Conscious leadership is a recent construct, which we do not yet know much about. Most leaders already have their own way of management, which they often associate with their way of life. Thus, we know various ways of managing. A true conscious leader must be aware of his position and his mission, and must strive to be educated every day, work on his own consciousness, form his own context of life, try to perceive information from the surroundings, learn from life experiences, and closely monitor all the events around him. There are many ways to teach us how to become a good leader, and we ourselves need to figure out which theory and method of leadership best suits us and is most appropriate for us. In conscious leadership, we must first become self-aware; we must have a systemic insight, must be conscious of things and build on collective consciousness. Conscious guidance is a way of life that we build for years and years. A good conscious leader is the one who learns and improves daily until the end of his career and wants to leave a positive mark in the world. We will study what and how influences on the level of conscious leadership, and how we can become a good conscious leaders. We will achieve this through a critical review of secondary literature and a synthesis of relevant literature in which this topic is addressed, as well as a clarified narrow*

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scientific field of conscious leadership and the effects of conscientious leadership on followers in organizations. We will also create a conceptual model of conscious leadership.

Keywords: *Conscious leadership, organization, management, awareness, conceptualization, implication.*

1. UVOD

Večina ljudi si želi službo v kateri bi uživali. Delavci si želijo delati v okolju v katerem bi bili sprejeti takšni kot so in da lahko brez strahu izrazijo svoja čustva in ideje. Zato je zavestno vodstvo pomembno. Ne le, da se ljudje počutijo dobro v takem okolju, so tudi bolj produktivni, zagnani in lojalni [1]. Zavestno vodenje zahteva preoblikovanje samega sebe. Ne razvija le kritičnih veščin, ampak tudi notranjo dušo. S tem procesom začnemo razmišljati o sebi ter o lastni viziji. Ko se zares zavedamo, kaj želimo doseči v svojem življenju, si dovolimo, da popolnoma stopimo v prostor neskončnih možnosti, kjer je neznan naš zaveznik in ne sovražnik. Sprejeti moramo lastno življenjsko zgodbo in začeti sprejemati ustrezne spremembe in odločitve, ki vodijo v pozitivno in navdihujoče življenje. Ko se bomo zavedali svojega življenja, bomo lahko vodili tudi druge po njihovih poteh [2].

2. RAZLIKA MED TRADICIONALNIM VODENJEM IN ZAVESTNIM VODENJEM

Naše upanje v boljši svet je v zavestnem vodenju. V nasprotju s tradicionalnim vodenjem, ki se kaže kot odtujenost do ljudi, degradacijo okolja in kulturne homogenizacije lahko zavestno vodenje vodi k boljši prihodnosti. Zavestno vodenje temelji na predpostavki, da je vse povezano in deluje složno, kot list na drevesu, ki tekmuje za iste vire preživetja. Zavestno vodenje torej išče nove načine za boljšo prihodnost vseh. Skozi zavestno vodenje, bomo mogli preseči tradicionalni način reševanja sporov v našem svetu. S tem načinom vodenja lahko presekamo sprevržen nacionalizem, elitizem in fundamentalizem. Skozi zavestno vodenje moramo ustvariti način življenja, ki je trajnosten, da bodo naši potomci podedovali svet, ki ne bo tonil k propadu [3].

V spodnji tabeli bomo predstavili nekaj ključnih razlik med tradicionalnim vodenjem in zavestnim vodenje.

Tabela 1: Ključne razlike med tradicionalnim in zavestnim vodenjem [3].

| <i>Tradicionalno vodenje</i> | <i>Zavestno vodenje</i> |
|--|---|
| Zastrašuje, ima določena pravila, manipulira | Navdihuje, obuja veličino |
| Temelji na določeni obliki ali strukturi | Zaupava v sebe in druge |
| Je zunanje usmerjeno | Je notranje usmerjeno |
| Sčasoma postane rutinsko | Še naprej raste in se uči |
| Iz preteklih izkušenj se ne nauči veliko | Z vsako novo izkušnjo večja osebna rast |
| Avtoritativna, močna osebnost, ki ne izkazuje čustev | Verodostojna in resnična osebnost, ki mu čustva niso tuja |
| Prevladuje politika podjetja | Prevladuje resnica zgodb |
| Prisilno vodenje | Vodenje z zavestjo in |

| | |
|------------------------------------|--|
| Izkazovanje moči na vseh področjih | prisotnostjo |
| Ščiti lastne potrebe | Zna prisluhniti vsem in jih poskuša razumeti |
| | Deluje za skupno dobro |

2.2 NAČINI, KAKO POSTATI ZAVESTNI VODJA

Zavestni vodje govorijo z integriteto, vodijo z avtentičnostjo in so odgovorni. Poslušajo z namenom razumevanja in ne samo, da se odzovejo in to počnejo tako, da so v skladu z moralnim in etičnimi načeli. Predstavili vam bomo nekaj načinov, kako postanemo lahko zavestni vodja [4].

- Gojiti je potrebno samozavedanje; Da smo samozavestni, je nedvomno najbolj koristna stvar, ki jo lahko naredimo za svoj stil vodenja. To je dejanje spoznavanja sebe ne le kot vodje, ampak kot osebe. V kolikor že poznamo svoje prednosti in slabosti, se zavedamo svojih mislih, čustev in motivov, smo že veliko naredili na sebi. Če se vsega tega zavedamo, jih lahko tudi upravljamo.
- Meditiranje; To je sestavni del zavestnega vodje. Številne študije so pokazale, da lahko meditacija zmanjša stres, spodbudi ustvarjalnost, izboljša spanje, izboljša funkcionalnost možganov in nam celo pomaga pri osredotočanju. Čeprav obstaja na ducate koristi, celotno dejanje meditacije pogloblja našo zavest. Dobra stvar pri tej starodavni tradiciji je, da obstaja veliko oblik meditaciji, tako si lahko izberemo takšno, ki nam najbolj ustreza.
- Z namenom je potrebno početi stvari; Zavestni vodje uspejo, ker z določenim namenom počnejo stvari, katerih se zavedajo. Biti z namenom je predpogoj za življenje življenja pod svojimi pogoji [1].
- Izvajanje štirih sporazumov; Don Miguel Ruiz je predlagal štiri sporazume, ki lahko spremenijo naše življenje in ga postavljajo na pod do osebne svobode. Zavestni vodje vidijo te sporazume, ki izhajajo iz Tolteške modrosti, jot priložnost za izboljševanje njihovega osebnega vodenja. A) Bodite odkriti (povejte samo, kar mislite, govorite samo pozitivno). B) Ne jemljite ničesar osebno (ničesar, kar počnejo drugi za vas, vse je projekcija njihove lastne realnosti. C) Ne narekujte predpostavk (namesto tega, postavljajte vprašanja in komunicirajte). D) Vedno naredite vse, kar je v vaši moči (vedno se trudite, da boste dosegli najboljši rezultat, tako ne boste mogli obžalovati, če vam kaj ne uspe). Ti štiri sporazumi ustvarjajo pot do novega načina zavestnega vodenja naših življenj, naših ljudi in naših podjetij [4].

3. KONCEPTUALIZACIJA ZAVESTNEGA VODENJA

Konceptualizacija zavestnega vodenja je sestavljena iz treh podskupin: razširjene zavesti; elementov zavestnega vodenja in zavestnega vodenja, ki se med seboj vzajemno prepletajo. Ward [5], opisuje kako razširjeno zavest sooblikujejo meditacija; življenjske vrednote; življenjski cilj; ter zdrav duh v zdravem telesu. Teh elementov se človek lahko priuči in skozi vsakodnevno vajo tudi izboljšuje. Ti elementi spodbujajo posameznikovo notranjo rast in pomagajo oblikovati svoj lastni jaz in izražanje. Pri elementih zavestnega vodenja, Hayden [6] opisuje naslednje: življenjskem kontekstu; razširjeni zavesti; zaznavnih filtrih; življenjskih izkušnjah in pozornosti. Pri posamezniku so te elementi lahko bolj ali manj očitni, saj ima vsak posameznik drugače razvite svoje kompetence. Kot vemo, so nekatere kompetence lahko prirojene, nekaterih se lahko priučimo, spet druge lahko pridobimo skozi življenjske izkušnje. Pravi zavestni vodja, se mora zavedati, da mu vsak nov dan prinese nove izkušnje, ki jih lahko s pridom izkoristi za svojo dobrobit. Kot tretji element, ki sestavlja konceptualizacijo zavestnega vodenja pa je zavestno vodenje. Ta podskupina koncepta je najpomembnejša za celotno

obravnava konceptualizacije, saj jo sestavljajo: samozavedanje, sistemski vpogled; kolektivna zavest in vodja mora biti zavestno pri stvari. Ti elementi pa so ključnega pomena za oblikovanje dobrega zavestnega vodje [7].

Slika 1: Prikaz konceptualizacije zavestnega vodenja (lasten prikaz)



4. ZAVEZE, KI JIH MORA SPREJETI ZAVESTNI VODJA

J. Dethmer, D. Chapman in K. Klemp [8] opisujejo petnajst zavez, ki si jih mora zavestni vodja posluževati, da bi postal iz dneva v dan vedno boljši. V spodnji tabeli bomo grafično prikazali te obveze.

Tabela 2: Zaveze, ki jih mora sprejeti zavestni vodja (lasten prikaz)

| <i>Zaveza</i> | <i>Obrazložitev / Zavezati se mora;</i> |
|----------------|--|
| 1. Odgovornost | Da bo prevzel polno odgovornost svojega življenja, fizično, čustveno, duševno in duhovno blaginjo. |
| 2. Radovednost | Da bo poskušal rasti v samozavedanju, da bo vsako interakcijo obravnaval kot priložnost za učenje. |
| 3. Čutnost | Da bo delal po svojih notranjih občutkih do konca naloge. |
| 4. Odkritost | Da bo govoril iskreno in resnično, ter podajal verodostojne informacije. |
| 5. Direktnost | Da bo govoril neposredno z ljudmi, s katerimi ima problem. |
| 6. Integriteta | Da bo celovit, skladen, pristen, pošten ter verodostojen, vključno s priznavanjem vseh avtentičnih občutkov. |
| 7. Spoštovanje | Da bo živel v hvaležnosti in se popolnoma odprl |

| | |
|--------------------------|--|
| 8. Genialnost | tako za sprejemanje kot za priznanje. Da bo izrazil svojo popolno veličastnost in podpiral, ter navdihoval druge, da v celoti izrazijo svojo ustvarjalnost in živijo na svoj način. |
| 9. Igrati pozitivno igro | Da bo v življenju improviziral, se smejal in razmišljal pozitivno. |
| 10. Poslušnost | Da bo poslušal več plati zgodbe, ter šele po tehtnem premisleku zajel stališče. |
| 11. Odobravanje | Da bo živel v prepričanju, da njegova odobritev in nadzor prinašata skupno dobro. |
| 12. Zadovoljstvo | Da bo zadovoljen, da ima dovolj časa, denarja, ljubezni, energije,... |
| 13. Zavezniki | Da bo videl vse ljudi v vseh okoliščinah kot zaveznike, ki so popolnoma primerni, da mu pomagajo pri učenju najpomembnejših stvari za osebnostno rast. |
| 14. Zmaga za vse | Da bo ustvarjal zmago za vse rešitve. Zmaga zase, zmaga za drugo osebo, zmaga za organizacijo, zmaga za človeštvo. |
| 15. Vedno je rešitev | Da je potrebno najti rešitev: uvideti tisto, kar manjka na svetu, ter to narediti za boljši jutri. |

5. ZAKLJUČEK

Sedanji vrhunski poslovni vodje, kot so John Mackey iz Whole Foods Markets, Eric Schmidt iz Googla in Anita Roddick iz Body Shopa imajo skupen način vodenja. Vsi so naredili prehod na nov način vodenja, ki upošteva pomembnost finančnih rezultatov in način, kako do teh rezultatov pridejo. Ugotovili so, da je trajnostni uspeh na današnjem trgu opredeljen z več kot kratkoročnimi cilji dobička in maksimiranjem bogastva delničarjev. To je nujen, vendar ne zadosten pogoj za trajnostni uspeh v svetu, ki čedalje bolj postaja občutljiv na negativne učinke tega dobička. Dejansko je sedaj stvar dobrega, da vodje obravnavajo ljudi, dobiček in planet, kot nujnost njihovega upravljanja [9].

Teorija zavestnega vodenja temelji na sociokulturnem znanju vzajemnosti, ki omogoča vodji zaznavo vzorca v okolju. Zavestni vodje se zavedajo organizacije in sodelujejo z zaposlenimi. Ključnega pomena za razumevanje te teorije je pripravljenost priznati in razumeti zavest kot najbolj kritičen del okvira. Vodstvo zato prakticira in omogoča vsem v organizaciji, da sodelujejo, ter se tako naučijo sodelovanja, ki spodbuja osebno in skupinsko odgovornost do širšega dobrega [10].

Vse te misli in ugotovitve, ki smo jih napisali so zgolj akademska retorika, razen če se bomo zavzeli k temu, da jih podpremo in začnemo izvajati. Ali smo pripravljeni, da se potopimo vase, da preučimo samega sebe in dvignemo svojo zavest, ter da začutimo vest, ki nas veže do človeštva in da ustvarimo boljši jutri, ki bo služil generacijam.

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SOCIAL INTELLIGENCE AS A PREREQUISITE FOR SUCCESSFUL LEADERSHIP

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Abstract: *According to the generally accepted behavioral leadership theories, effective leaders need to have high-profile competencies as well as relationships. In almost every specification of these competencies, one encounter, to a greater or lesser extent, the characteristics that are related to the social sphere of work and may also be related to social intelligence. The presented contribution, therefore, addresses the issue of leadership and social intelligence in the work process. It presents research the main objective of which was to analyze the prerequisites and qualities that can lead to successful leadership. Part of this objective was to reveal the links between the perceptions of an individual's ability to become a successful leader and social intelligence. The research results acquired from the sample of 115 respondents by means of an own leadership perception questionnaire and the social intelligence methodology TSIS [1] prove that socially intelligent leaders are more future-oriented and work hard to improve their leadership skills.*

Keywords: *Leadership, social intelligence, TSIS methodology, competency, work environment*

1. INTRODUCTION

Successful managers are convinced that their own strengths are the greatest prerequisite for success, and they rely solely on themselves [2]. By contrast, support from the organization ranks first among common managers, which shows that their success or failure is more in the hands of others [3]. Every manager wants to be successful in their role and they also want to be respected by others. How this recognition is achieved in the contemporary organizations is unclear [4].

According to [5], being a successful manager is much more challenging than being a good expert. If there is any secret to success, it is the ability to accept an external viewpoint and see things from the perspective of the other person. Although, according to [6], the qualities of leaders can change in different situations, most of the studies on leadership issues and assumptions consider important attributes such as social and emotional intelligence, charisma, and humor.

The main objective of the following report is, thus, to address the issue of leadership and social intelligence in the work process by means of an analysis of the prerequisites and qualities that can lead to successful leadership. Part of this objective is to reveal the links between the perceptions of an individual's ability to become a successful leader and social intelligence.

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2. LEADERSHIP

Leadership is an aspect explored from many angles. It is often regarded as something extraordinary, something that requires special tools and abilities. Authors [7] have proposed redefining the leadership theory with respect to the worldly, almost trivial aspects of what managers and leaders actually do.

Generally speaking, leader is any person who is able to mobilize others to voluntarily follow a direction. This is an essential ability of managers, who become formal leaders of organizations [8]. Leaders, leadership, and the innovative nature of human resource management are some of the decisive factors in the competitive advantage [9]. True leaders are able to sacrifice themselves for leadership and their business goals, which is something that makes them unambiguously different from ordinary people who have the same good or even better disposition for different abilities and techniques [10].

Leaders should be characterized by energy, optimism, determination, ideas, trust, susceptibility, command and endurance [11]. Author [12] adds that creativity, intuition, purposefulness, responsibility, self-confidence, self-esteem, decisiveness, principle, discipline, and fantasy are also important qualities which determine managers' successfulness. Author [13] states that current management is interested in personality traits such as honesty and integrity, self-confidence, intelligence, drive, and knowledge of the world of business.

3. SOCIAL INTELLIGENCE

Social intelligence is manifested especially in interpersonal, personal and social relationships. The concept of social intelligence has emerged in the 1920s. A pioneer of the study of social intelligence was [14], who defined it as the ability to understand and direct men and women, boys and girls – to act reasonably in interpersonal relationships. This definition became the basis for further theoretical concepts, and it includes the ability to understand other people, knowledge of standards, understanding of social situations or social communication [15], acting in accordance with social requirements, and flexibility in different social situations. In defining social intelligence, therefore, its various components are emphasized. Authors [16] outlined the following components of social intelligence: perception of mental states and moods of other people; general ability to get along with other people; knowledge of social rules; insight in and perception of complex social situations; use of social techniques for manipulation of others; taking over the perspective of others; and social adaptation.

In the earlier studies of social intelligence, two basic approaches were distinguished by [17] as the psychometric (defined by performance aimed at social sphere) and the personality approach. Social behavior is intelligent and is governed primarily by cognitive processes of perception, memory, reasoning, and problem solving. Individual differences in social behavior stem from differences in the knowledge that people have gained in social interactions.

4. SOCIAL INTELLIGENCE IN LEADERSHIP

According to [18], the secret of leadership lies in power and influence. It is the art of becoming an expert on social intelligence. It is about understanding the effects that individuals have on other people when dealing with them. They are capable of influencing the positive consequences for both sides through active involvement of social intelligence as a catalyst for responses.

Conditions of the current global market represent new demands on managers. According to [19], the economic recession, the global crisis, and other external influences bring managers daily into new situations in which they have to make strategic decisions. Multiple variables enter the decision itself, with social skills being most prominent. Socially intelligent leaders monitor the way in which they respond in different situations, and they continually perceive their role and their position. Successful are those leaders who understand the context of the situation and actively respond to changes in the social environment.

Managers cannot make decisions without taking into account the social context. Their management is effective only if they are familiar with the opinions and needs of their co-workers, and if they can subsequently influence them in an appropriate way [20]. According to [21], this is also reflected in the fact that almost every specification of managerial competences is more or less confronted with characteristics related to the social sphere of managerial work, and may also be related to social intelligence.

5. RESEARCH METHODOLOGY

The aim of the research was to analyze the prerequisites and qualities that lead to successful leadership. Another goal was to find the connection between perception of own abilities to become a successful leader and social intelligence.

The research sample consisted of 115 respondents, including 46 men and 69 women aged from 18 to 51. The analyses were carried out using the TSIS – Tromso Social Intelligence Scale [1], which contains 21 self-evaluation items to which the respondents reacted by means of a 7-point agreement scale (1 = Describes me extremely poorly, 7 = Describes me extremely well). The questionnaire is divided into three sub-scales and enables specification of 3 factors: Social Information Processing, Social Skills, and Social Awareness. To study the perception of qualities, our own original questionnaire items were formulated.

6. RESEARCH RESULTS

To find the links between the perception of one's own leadership prerequisites and the opinions on their acquisition and improvement, the p-values, correlation strength and size, and the direction of the linear relationship of this test were calculated (Table 1) by means of the SPSS statistical software.

Table 1: Inter-correlations of the studied variables (**p<0.01)

| | Item 1 | Item 2 | Item 3 | Item 4 | Item 5 | Item 6 |
|--------|--------|--------|--------|--------|--------|--------|
| Item 1 | | | .194** | | | |
| Item 2 | | | | .271** | .415** | .287** |
| Item 3 | .194** | | | | | |
| Item 4 | | .271** | | | | |
| Item 5 | | .415** | | | | |
| Item 6 | | .287** | | | | |

Legend:

Item 1: I consider myself a leader.

Item 2: I improve my leadership skills by work.

Item 3: My leadership skills are innate.

Item 4: I see contribution in education in the area of leadership skills.

Item 5: I have the prerequisites to be a leader.

Item 6: I have a leader-idol in the family/among my acquaintances.

Those respondents, who consider themselves leaders, perceive leadership abilities as innate. On the contrary, respondents who think they need to work on themselves say that they need further education and training to develop their leadership skills. They perceive themselves as having good prerequisites for the work of the leader. The addressed respondents see a sense in gaining and improving their leadership abilities.

Based on the response to the item „What do you think is the basis of leadership?“, it was found that authority, social intelligence, motivation and talent are among the most important. These values are recorded in Table 2.

Table 2: Basic attributes of leadership

| Importance | Talent | Social intelligence | Power | Influence | Motivation | Authority | Education |
|---------------------|--------|---------------------|-------|-----------|------------|-----------|-----------|
| 1 – most important | 27% | 28% | 13% | 21% | 25% | 44% | 19% |
| 2 | 18% | 35% | 22% | 31% | 27% | 20% | 20% |
| 3 | 20% | 14% | 24% | 18% | 18% | 11% | 17% |
| 4 | 13% | 15% | 16% | 11% | 9% | 7% | 11% |
| 5 | 10% | 5% | 7% | 8% | 11% | 6% | 14% |
| 6 | 10% | 2% | 14% | 4% | 6% | 8% | 8% |
| 7 – least important | 2% | 1% | 4% | 7% | 4% | 4% | 11% |

The links between the perceptions of one’s ability to become a successful leader and social intelligence were studied and verified by means of the Pearson correlation coefficient. The statistically significant links that were recorded are presented in Table 3.

Table 3: Correlations between social intelligence attributes (TSIS) and leadership skills (**p<0.01)

| TSIS Leadership | Social Information Processing | Social Skills | Social Awareness |
|-----------------|-------------------------------|---------------|------------------|
| Item 1 | .169** | .220** | .393** |
| Item 2 | .256** | .270** | .238** |
| Item 5 | .168** | .221** | .394** |
| Item 7 | .328** | .340** | .175** |
| Item 8 | .326** | .344** | .177** |

Legend:

Item 1: I consider myself a leader.

Item 2: I improve my leadership skills by work.

Item 5: I have the prerequisites to be a leader.

Item 7: I want to become a good leader in the future.

Item 8: I like to cooperate with other leaders.

Within all the analyzed items, positive statistically significant correlations between the studied phenomena were recorded. Socially intelligent leaders (according to the TSIS methodology) are future-oriented and work to improve their leadership capabilities. It is positive that they do not refuse to cooperate with other leaders and have enough self-confidence in their own leadership abilities.

7. CONCLUSION

A capable leader who can stand at the forefront and lead their team to success is irreplaceable [22]. As leadership is linked to a character that is not innate, we can shape it, improve it, and thus reach equilibrium [23]. Through regular practice, leadership prerequisites and skills can be significantly improved [24]. The role of leaders is to ensure that the organization operates and performs its tasks through other people. In the first place, it is necessary to respect the needs of co-workers, to understand the motives of behavior and behavior of people, to give them a sense of quality self-realization, and a sense of pride [25]. It is an art to persuade, direct and stimulate subordinates to perform quality work and thus achieve corporate goals [26]. All managers should be leaders and should spend more time with people, lead them well and motivate them towards achieving realistic strategic goals and long-term visions. Socially intelligent leaders are irreplaceable in managerial practice.

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UTICAJ LIDERSTVA NA PERFORMANSE I KULTURU ORGANIZACIJE

THE IMPACT OF LEADERSHIP ON THE PERFORMANCE AND CULTURE OF THE ORGANIZATION

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Sadržaj: *Uvođenje organizacione kulture u organizaciju predstavlja proces koji traje nekoliko godina, iz tog razloga lideri moraju postati uzor u ponašanju, jer su oni u organizaciji glavni kreatori nove vrednosti, simbola, rituala, priča... Pojam organizaciona kultura znači imati lojalne i motivisane zaposlene. Uticaj lidera na uspostavljanje, iniciranje i implementaciju organizacione kulture, zasniva se na vrednostima koje karakterišu sklonosti lidera ka promenama. Pod liderstvom se podrazumeva proces menjanja organizacione kulture, rešavanje aktuelnih problema u oblasti rukovođenja i kontrole, kao i pripremanje same organizacije na suočavanje sa budućim problemima. Lider mora posedovati sposobnost da organizaciju učini profesionalnom, da kreira sama mogućnosti. Takođe, lider mora da se orijentiše na preuzimanje rizika i na poslovni rezultat. Obzirom na dinamičku prirodu organizacije, sa sigurnošću se može tvrditi da će se organizacione performanse stalno menjati. Kako bi poslovanje organizacije bilo uspešno veoma je važno da postoji sklad između lidera i njene organizacione kulture. Ukoliko postoji ova usklađenost, organizaciona kultura predstavlja socijalnu podršku za ostvarivanje poslovnih ciljeva. Međutim, ukoliko su lider i organizaciona kultura u suprotnosti, organizaciona kultura predstavlja problem i tada je neophodno promeniti lidera ili započeti proces promene organizacione kulture, a sve u zavisnosti od mogućnosti u datom okruženju. Lider kroz uticaj na formiranje organizacione kulture determiniše posebnost organizacije da se uspešno nose sa promenama u internom i eksternom okruženju, a naročito u kriznim situacijama. Kako bi se u tome uspelo neophodno je da organizaciona kultura bude bazirana na vrednostima lidera, u kojima je sadržana sklonost ka promenama. U zavisnosti od sistema vrednosti koji je prihvaćen i na kome je zasnovana organizaciona kultura, od ideja, koncepta i stavova koji se promovišu, lider značajno utiče na performanse i kulturu organizacije i inicijator je procesa promena u organizaciji.*

Ključne reči: *organizacija, organizaciona kultura, lider, liderstvo, performanse, promene*

Content: *The introduction of organizational culture is a process which takes several years and consequently it is essential for leaders to become role models, as they are the main creators of new values, symbols, rituals, stories, etc. in their organizations. The concept of organizational culture implies loyal and motivated employees. The influence of the leader on establishment, initiation and implementation of organizational culture is based on values which are characterized by the leader's inclination for change. Leadership is the process of changing organizational culture, solving current management and control issues as well as preparing*

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the organization itself to cope with problems in the future. The leader needs to possess the ability to make the organization professional and capable of creating its own opportunities. In addition, the leader must focus on the business result and risk-taking. Given the dynamic nature of the organization, it can be argued with certainty that organizational performance will be constantly changing. Harmony between the leader and organizational culture is of crucial importance for the organization to operate successfully. If such compatibility exists, organizational culture provides social support for achieving business goals. However, in case the leader and organizational culture are in conflict, organizational culture poses a problem and therefore it is necessary either to change the leader or initiate the process of organizational culture change, depending on the circumstances of the environment. Through the influence on the development of organizational culture, the leader determines the ability of the organization to cope with changes in the internal and external environments, especially in crisis situations. In order to succeed, it is essential that the organizational culture is based on the leader's values, which include the inclination for change. Depending on the accepted value system on which the organizational culture is based, on ideas, concepts and attitudes that are being promoted, the leader significantly influences the organization performance and is the initiator of the change process in the organization.

Keywords: *organization, organizational culture, leader, leadership, performance, change*

1. UVOD

Uticaj organizacionih performansi i kulture istraženi su i dokazani u praksi. Dokazano je da organizacija sa konstruktivnom kulturom generiše daleko bolje rezultate od onih sa birokratskom, odbrambenom i sličnom kulturom. S druge strane, lider je taj koji daje pečat organizaciji i zaposlenima, menja ih i izgrađuje njihov novi identitet kroz uspostavljanje novih vrednosti.

Organizaciju u kojoj je ponašanje zaposlenih fokusirano na platu i sigurnost, karakteriše odsustvo interesovanja, inicijative i pasivnost, konstantno protivljenje, slaba saradnja, traženje krivice i krivca, nekorektno unutrašnje takmičenje i sl. A ponašanja zaposlenih u bilo kojoj organizaciji, dostupna su i vidljiva, i ne retko takva, da ne podržavaju ciljeve organizacije.

Za uspešno poslovanje organizacije veoma je važno da postoji sklad između lidera i njene organizacione kulture. Organizaciona kultura može da bude moćna socijalna podrška ostvarivanju poslovnih ciljeva, „vetar u leđa“ poslovnom uspehu, ukoliko taj sklad postoji. Međutim, ukoliko su ti principi u direktnoj suprotnosti, organizaciona kultura može predstavljati dodatni problem organizacionim naporima. U tim slučajevima treba promeniti lidera ili pristupiti složenom poslu promene organizacione kulture, a u zavisnosti od toga šta je moguće uraditi u datom okruženju.

2. ZNAČAJ LIDERA ZA ORGANIZACIONU KULTURU I PERFORMANSE ORGANIZACIJE

U vremenu jake konkurencije, ulaska na globalno tržište i brzih promena, lider ima značajnu i veliku ulogu i još veću odgovornost. Od lidera se očekuje da razmišlja strateški, razvija kapacitete organizacije i zaposlenih, i da usmeri organizaciju na ostvarivanje konkurentne prednosti na tržištu. Zbog toga je neophodno da razvija nove sposobnosti i nove veštine, da bude pripremljen, da koristi savremene metode u radu i razvija kvalitetnije odnose sa

saradnicima. Uloga lidera je, pored toga, da razvija saradnike, a uloga saradnika, da razvijaju organizaciju i lidera, zbog čega Henry Klumo kaže: često se osvrni iza sebe, da vidiš koliko ljudi te prati.

Organizacija se može uslovno definisati kao svako udruženje dvoje ili više ljudi da izvrše neki posao, pri čemu oni definišu cilj udruženja, obezbeđuju sredstva, raspoređuju zadatke i vode određene poslovne procese, izvršavaju određene funkcije radi realizovanja ciljeva. U vreme kada organizacije posluju u okruženju u kojem nastaju brze, dinamične, radikalne, nepredvidive promene, liderstvo je postalo presudni faktor opstanka i konkurentnosti korporacije. Iz tog razloga se povećava broj autora iz oblasti menadžmenta koji definišu liderstvo kao najznačajniji faktor koji određuje performanse organizacije.

Lideri stvaraju viziju, koriste svoje sposobnosti kako bi izvršili uticaj na zaposlene da je prihvate, ka kojoj će stremiti tokom obavljanja poslovnih aktivnosti, motivišu zaposlene da ostvare veći učinak i daju veći doprinos u ostvarenju ciljeva organizacije. Takođe, postavljajući moralna načela i uvodeći etiku u poslovanje, utiču na korporativnu kulturu, koju poštuju svi zaposleni, razvijajući nove stavove i vrednosti kod zaposlenih.

Zahvaljujući svom znanju, sposobnostima, iskustvu i intuiciji, lideri donose odluke o uvođenju promena u internom i eksternom okruženju organizacije. Međutim, sposobnost liderstva, ne predstavlja ekskluzivno pravo onih koji su s njom „rođeni“; osobine neophodne za liderstvo mogu da se nauče. Leonard Rejvenhil u svom biltenu o poslednjim danima, govori o jednoj grupi turista koja je posetila neko selo. Dok su prolazili pored nekog starca koji je sedeo uz ogradu, jedan turista s visine ga je upitao: da li su se u ovom selu rađali veliki ljudi? Starac mu je odgovorio: ne, nisu, samo bebe. Dakle, sposobnost liderstva se uči i razvija, mada će uvek postojati oni koji su „rođeni“ da budu vođe. O tome teorija ima različite pristupe, ali bez obzira na to, svi se slažu da je značaj lidera u bilo kojoj organizaciji, privrednoj, državnoj ili političkoj partiji veoma važan.

Cilj lidera je da obezbedi da organizacija spozna samu sebe, [1], pa stoga na lidera treba gledati kao na ogledalo, na osobu koja podstiče i pomaže procese, koji obezbeđuju da ljudi lakše shvate svoje mogućnosti i sposobnosti, odnosno, da prepoznaju u koje aktivnosti žele ili mogu sa što manjim rizikom ući. Moraju se poznavati klijenti/potrošači, moraju poznavati jedni druge, mora se znati zašto se nalaze baš u tom poslu, što implicira da profil lidera savremenih organizacija treba posmatrati u dinamičnom razvoju okruženja, na koje deluju politički, pravni, tehnološki, ekonomski, kulturni, fizički faktori. Autori se slažu, da lider savremenih organizacija treba da bude vanserijska ličnost, čije će radne navike i intelekt biti u skladu sa situacijom iz okruženja.

Eminentni autori smatraju da poslovna transformacija predstavlja primarni i centralni izazov za lidera, te da će ključna konkurentna prednost u budućnosti biti njihova sposobnost da generišu i kreiraju organizacioni kapital. [2]

U savremenoj privredi, oni predstavljaju specifičnu aktivnu organizacije, i izabrani ili samoizabrani, opredeljuju njenu sudbinu.

Organizacije koje nemaju liderstvo, imaju manje šanse da se suoče sa rastućim problemima koje prate savremeno doba. Ali, uspeh savremenih organizacija ne zavisi samo od lidera, već i od sledbenika. Dakle, organizaciji je potreban lider koji zna da vodi sledbenike i sledbenici koji znaju da slede lidera.

2.1. LIDERI I VISOKE PERFORMANSE ORGANIZACIJE

Poznati autor iz oblasti menadžmenta, Voren Benis, kaže da je za lidera karijera i vođenje sam život. Dobar lider nije finansijski šahista sa MBA diplomom u džepu. Pravi lider uči i iz humanističkih disciplina, kao što su: književnost, umetnost, istorija. Te discipline mu daju kreativnost i inovativnost, i širinu, koje su bitne za stvaranje preduzetničke umesto administrativne strukture u organizaciji i čine ga spremnijim za uočavanje promena u okruženju i reagovanje na njih.

Model organizacije visokih performansi pokazuje kako se na osnovu liderstva, vizije i vrednosti menjaju strategija, strukture i sistemi organizacije. Liderstvo je bazirano na filozofiji, funkciji i formi, vizija se bazira na pravcu i izjednačavanju, dok se vrednosti baziraju na ponašanjima i kulturi. Uspeh se ogleda u modelu dostizanja visokih performansi, a one su u: kvalitetu proizvoda i usluga, dodatnoj vrednosti za potrošača i finansijskim performansama.

Za primenu modela potrebni su timovi ljudi koji su eksperti u svojim organizacijama, koji žele da budu nosioci promena, i kojima je potreban okvirni model promena. Merenje performansi rezultata demonstrira posle određenog vremena, da se utvrdi uzročno/posledični model zadovoljstva ili nezadovoljstva po pitanju anticipiranih rezultata. Merenje performansi utičaja ukazuje na to da li je dostignuta moralna svrha kojoj se težilo. Strategija organizacije, zasnovana na liderskim vrednostima u dinamičkom okruženju, konstantno treba da se vraća na ponovno utvrđivanje vizije i vrednosti, a da efikasnost i efektivnost bazira na rezultatima strateškog razmišljanja. Ako dobijeni rezultat strateškog razmišljanja bude efektivan strateški plan, iz koga se dobijaju efikasni operativni planovi, tada će i biznis planovi, koji su rezultat ovih poslednjih, i rezultati nastali iz biznis planova, biti output-i najviših mogućih performansi.

Lider podstiče organizaciju da analizira zahteve korisnika, definiše procese koji doprinose ostvarivanju proizvoda koji je prihvatljiv za naručioca i da drže ove procese pod kontrolom. Osim toga, lider može dati okvir za stalna poboljšavanja, kojima se povećava verovatnoća da se postigne povećavanje zadovoljenja korisnika i zadovoljenje ostalih stakeholdera. Time se kod organizacije i njenih korisnika obezbeđuje poverenje da je moguće isporučivati proizvode, koji konstantno ispunjavaju zahteve. Uspeh može da izađe iz primene i održavanja sistema liderstva koji je projektovan da stalno poboljšava performanse organizacije, obuhvatajući potrebe svih zainteresovanih strana.

Uloga kvaliteta direktno je uslovljena shvatanjem ovog termina. On ima različite nivoe primene i shvatanja. Najrasprostranjenija se odnosi na kvalitet proizvoda, odnosno usluge. Poseban nivo bi predstavljalo obezbeđenje kvaliteta, odnosno sistem mera koje organizacija preduzima kako bi kupcu pružila poverenje u ispunjenje zahteva za kvalitet proizvoda i usluga. Kvalitet proizvoda se, svakim danom, sve više smatra presudnim faktorom konkurentnosti, koji se tiče razvoja i opstanka svake organizacije, kao i privrednih grana. Praktično, osnovno je da se najpre ispitaju potrebe tržišta za kvalitetom konkretnog proizvoda, jer se često dešava u proizvodnji da, na primer, težnja za visokim kvalitetom iziskuje visoke troškove, a zbog nepoznavanja potreba potrošača, ovako visoki zahtevi za kvalitetom, umesto da utiču na povećanje profitabilnosti, imaju suprotan efekat. Kvalitet je jedini faktor koji i kupci i proizvođači smatraju ključnim, bez obzira što i jedni i drugi ponekad imaju različit pogled na njega.

Za primenu modela organizacije visokih performansi, pored navedenog, potrebni su timovi ljudi koji su eksperti, koji žele da budu nosioci promena i kojima je potreban okvirni deo promena i analitički pristup, na bazi dosadašnjeg napretka teorije. Iskustvo je pokazalo da

ukoliko organizacija nema dobro liderstvo, nema nikakve mogućnosti da se dobro primeni model. Da bi se izgradilo takvo liderstvo potrebno je dostići konsenzus u organizaciji oko jasne i sveobuhvatne zajedničke vizije svih zaposlenih u organizaciji. [2] u osnovi modela organizacije visokih performansi leži povratna sprega. Model pokazuje kako se na osnovu liderstva, vizije i vrednosti menjaju strategija, strukture i sistemi organizacije. Uspeh je sadržan u modelu dostizanje visokih performansi, a one su u: kvalitetu proizvoda i usluga, dodatnoj vrednosti za potrošača i finansijskim performansama. Okruženje reaguje na izmenu performansi i šalje signale u organizaciju za dodatne potrebne promene u njoj.

3. LIDERSTVO I ORGANIZACIONA KULTURA

Svaka organizacija ima kulturu koja oblikuje način na koji zaposleni u organizaciji pristupaju svojim poslovima, kako se ophode i ponašaju prema kolegama i klijentima. Ona je skrivena jer se članovi organizacije nesvesno ponašaju shodno očekivanjima koja smatraju da organizacija stavlja pred njih. Šta se podrazumeva pod pojmom kultura, odnosno, organizaciona kultura? Pod pojmom kultura podrazumeva se celokupno društveno nasleđe neke grupe ljudi, naučeni obrasci mišljenja, osećanja i delovanja neke grupe, zajednice ili društva, kao i na izraze tih obrazaca u materijalnim objektima. Reč kultura potiče iz latinske reči colere, što je znači: nastanjivati, uzgajati, štititi, poštovati. Jedinствена definicija organizacione kulture ne postoji. Većina definicija organizacione kulture ističe kognitivnu dimenziju, tj. norme i vrednosti kao njenu osnovu.

Organizaciona kultura se uglavnom definiše kao sistem pretpostavki, vrednosti i normi ponašanja koje su članovi organizacije razvili ili usvojili kroz zajedničko iskustvo i koje bitno određuje njihovo mišljenje i ponašanje. [3] Koncept organizacione kulture sastoji se u tome, da svaka organizacija oblikuje svoje sisteme vrednosti, verovanja i normi, koji će biti dovoljno privlačni i prihvatljivi za sve ljude u organizaciji. Prihvatanjem dominantnog sistema vrednosti i definisanih pravila ponašanja zaposleni se potpunije integrišu u organizaciju i snažnije vezuju za njene razvojne i druge ciljeve. Inače, termin organizaciona kultura nastao je u Americi i veoma brzo se proširio na ostatak poslovnog sveta. Napisano je mnogo članaka i knjiga o kulturi u organizacijama. Ovu kulturu obično nazivaju i korporativna kultura ili organizaciona kultura.

Dakle, organizaciona kultura obuhvata sistem vrednosti, odnosa, shvatanja, uverenja, etike, životnih stilova, i karaktera korporacije. Predstavlja sistem zajedničkih stavova i verovanja organizacionih članova, koji značajno određuje postupke zaposlenih. Ona je nevidljiva i neopipljiva. Odnosi se na skup zajedničkih vrednosti, normi i očekivanja koji oblikuju ponašanje zaposlenih u organizacijama, a pre svega način na koji zaposleni stupaju u međusobne interakcije, kako se odnose prema klijentima, kako izvršavaju svoje zadatke i kakve učinke postižu. Drugi poznavaoци ove paradigme bi jednostavno rekli: naša organizaciona kultura?! To je način na koji radimo stvari u našoj organizaciji! Kultura je povezana sa svim aspektima organizacije. Na primer, kultura je povezana sa vrednostima i verovanjima zaposlenih, u smislu šta je poželjno i nepoželjno u organizaciji. Kultura je, takođe, povezana i sa tehnologijom organizacije: veštine, oprema i tehnike koje omogućavaju organizaciji da proizvodi robu i usluge koje zahteva tržište. Kultura je, takođe, povezana i sa tipom organizacione strukture koju je prihvatila organizacija, a koja omogućuje članovima kompanije da uspešno koordiniraju svoja ponašanja.

U suštini, specifična kultura organizacije predstavlja način na koji se grupe godinama organizuju da bi rešile probleme ili odgovorile na izazove koji se pred njih postavljaju. Kultura treba da bude razvijena od strane organizacije a zatim prihvaćena ili naučena. Ljudi postaju

„obojeni“ načinima ponašanja, razmišljanjem i osećanjem karakterističnim za organizaciju u kojoj rade.

4. ZAKLJUČAK

Pod kojim uslovima lider može uticati na performanse organizacije i njenu organizacionu kulturu i da li može promeniti / unaprediti njene performanse? Koji stil liderstva će dati najbolje rezultate? Da li u donošenju odluka treba da učestvuju grupe, ili samo lider? Kakve su vrednosti koje preferiraju zaposleni, kakve su organizacione strukture, kako se zaposleni mogu motivisati, u kakvom je odnosu organizacija sa drugim organizacijama iz svoje sredine - samo su neka od pitanja, na koja će se još dugo tražiti odgovori. Naime, sva ova pitanja pretpostavljaju da postoji jedan i jedinstven odgovor.

Lider kroz uticaj na formiranje organizacione kulture determiniše posebnost organizacije da se uspešno nose sa promenama u internom i eksternom okruženju, naročito u kriznim situacijama. Da bi se u tome uspelo, potrebno je da organizaciona kultura bude bazirana na vrednostima lidera, u koje je inkorporirana sklonost promenama. To se može posmatrati sa više različitih aspekata u zavisnosti od toga da li su u fokusu dominantne vrednosti organizacije, odnos prema promenama u okruženju ili intenzitet interpersonalnih relacija zaposlenih. Lider koji se odlikuje visokom distancom moći, kolektivizmom i niskom tolerancijom neizvesnosti implicira u većini slučajeva birokratsku organizacionu kulturu koju karakteriše izražena hijerarhija, striktno poštovanje pravila i procedura, pretežna centralizacija odlučivanja i veoma slaba sklonost promenama, odnosno pružanje jakog otpora njihovom sprovođenju.

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CORRELATION BETWEEN INVESTMENT AND INCREASE IN THE NUMBER OF EMPLOYEES IN FACEBOOK SOCIAL NETWORK

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Abstract: *One of the main factors through which we value the performance of a business organization is with the rising number of employees. This is a factor that work in the organization is going well. If we want the rising number of employees to be stable than it should be done proportionally with the rising number of investments in organization and its development. Statistics is a science of numbers which helps us finding a relation or in common between these two occurrences. Company that we are going to find this relation between two occurrences is Inc. Facebook. Analyses of its studying and correlation will be extended in a period of years, precisely from 2009. Inc. Facebook was taken as a case study because this company is very serious and also for the fact that it has above one billion users of its services and from the beginning of 2004 it had an increase of employees and investments. From this study we will see how this relation between these two occurrences is strong and almost perfect so it will have the maximal value of 1, or it will come near it. As lower from 1 as it can get then also the strength of the connection weakness. Results from this study are very important because based on trending investment we can predict future investments.*

Keywords: *correlation, employees, investments, Facebook, strength, etc.*

INTRODUCTION

Facebook is an educational and entertaining web page, which belongs to Inc Facebook., located in Palo Alto, California. Facebook is a social media that started in February 2004 and is operated by Inc. Facebook. Users can add people as friends and sent their messages, and update their personal profile to inform friends about themselves. Beside this, users can join networks organized from work, school or college. Facebook name comes from books that are published from American universities and there are written names of all the students of that university, this is done in order to recognize other students there. Everyone above 13 years old can be a Facebook user.

Facebook was faced with some problems. It was banned in some counties including Pakistan, Syria, China, Vietnam and Iran. It was also banned in many work places to discourage employees that lose most of the time using this service [1].

1. HOW EVERYTHING STARTED

Mark Zuckerberg was 19 years old when he started “Facebook” from his dormitory room in Harvard. Within 24 hours 1000 people from his school were signed up and after one month half of his school members had a Facebook profile. Today after 12 years this web page has above one and a half billion users all over the world and Zuckerberg is the youngest billionaire in the world – with a wealth around 1.5 billion dollars [2]. Zuckerberg created not only a social

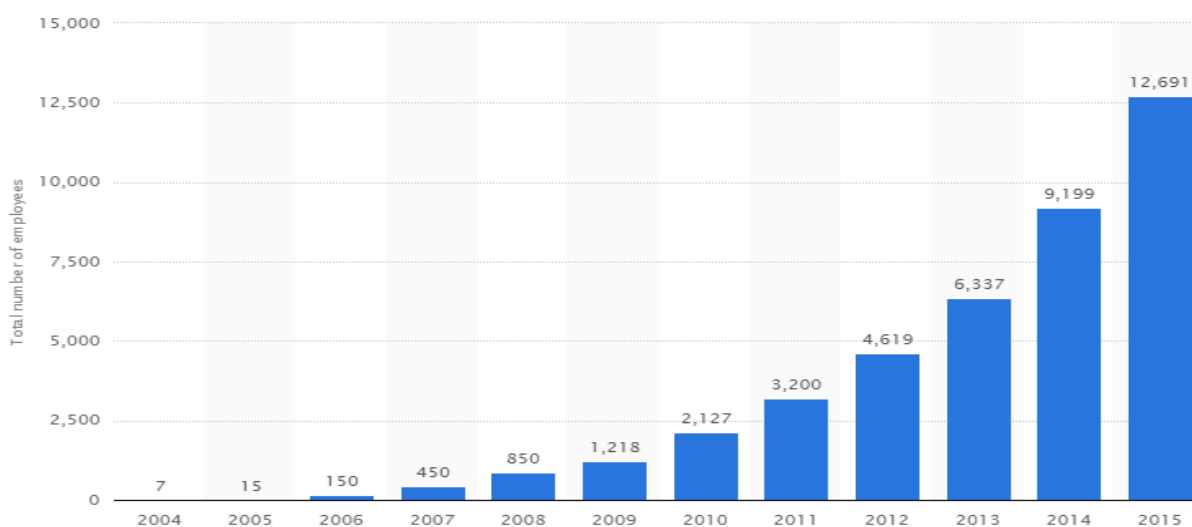
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network that shows us a person's life, but also expands it. Facebook phenomenon was represented also from politicians, and from artists. Everyday 15 million users change their status on "Facebook" and 850 million photos are added every month. User's average number of friends is 130. In the beginning people were worried to show their identity on internet, but now some of them show various details from their life. Although with a wealth from 1.5 billion dollars "Facebook" has to work hard to adapt technology and to have financial winnings.

"Facebook" on March 31, 2016, had exactly 13.598 employees [3].

1.1. NUMBER OF EMPLOYEES THROUGH YEARS

Number of employees in Inc Facebook during the last years is shown below [4].



1.2 DEVELOPMENT OVER THE YEARS

2004

February: Mark Zuckerberg and co-founder Dustin Moskovitz, Chris Hughes and Eduardo Saverin launched Facebook through their dormitory room in Harvard.

March: Facebook expands from Harvard to Yale, Stanford and Columbia.

June: Facebook shifts its base where it's located also this day, Palo Alto, California.

September: Wall application is added in Profile page.

December: Facebook reaches one million active users.

2005

August: Company officially changed its name from thefacebook.com in Facebook.

October: Photo application is added.

December: Facebook reaches more than 5.5 million active users.

2006

December: Facebook reaches more than 12 million active users.

2007

April: Facebook reaches more than 20 million active users.

October: Facebook reaches more than 50 million active users.
 October: Facebook offers Facebook platform for mobile phones.

2008

February: Facebook is offered in French and Spanish language.
 March: Facebook is offered in German language.
 April: Facebook is offered in 21 languages.
 April: Chat is offered in Facebook.
 August: Facebook reaches more than 100 million active users.

2009

January: Facebook reaches more than 150 million active users.
 February: Facebook reaches more than 1750 million active users.
 February: Facebook adds “Like” button.
 February: Facebook reaches more than 200 million active users.
 July: Facebook reaches more than 250 million active users.
 December: Facebook reaches more than 300 million active users.

2010

February: Facebook reaches around 400 million active users.
 July: Facebook reaches around 500 million active users.

2011

July: Facebook reaches around 750 million active users.

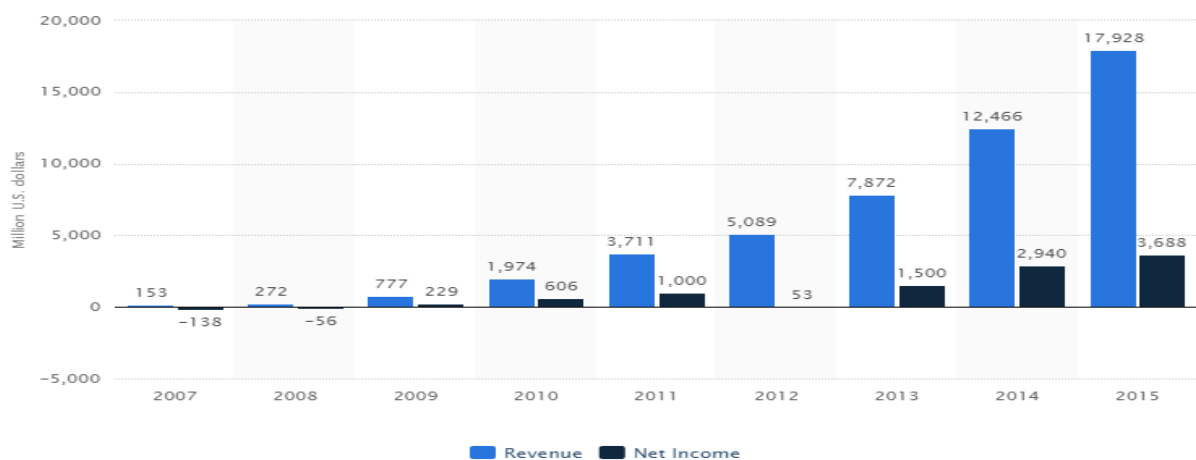
2012

October: Facebook reaches more than 1 billion active users.

2016

March: Facebook reaches more than 1.65 billion active users.

1.3 ANNUAL INCOME



Most of the incomings in Facebook are made from advertisements in so-called banner, and all these ads are from advertising inventory in Microsoft, since Microsoft is the main advertising partner of Facebook [5].

2. INVESTMENTS BY SERIES

List of Facebook investors is as below [6]:

| Month/Year | Company | Sum (millions) |
|------------|---|----------------|
| 09/2004 | Peter Thiel | 0.5\$ |
| 05/2005 | Accel Partners | 12.7\$ |
| 04/2006 | Greylock Partners Meritech Capital Partners The Founders Fund | 27.5\$ |
| 10/2007 | Microsoft | 240\$ |
| 11/2007 | Li Ka -shing | 60\$ |
| 01/2008 | European Founders Fund | 15\$ |
| 05/2008 | TriplePoint Capital | 100\$ |
| 05/2009 | Digital Sky Technologies | 200\$ |
| 06/2010 | Elevation Partners | 120\$ |
| 12/2010 | Goldman Sachs Group | 500\$ [7] |
| 01/2011 | Goldman Sachs Group | 1.000\$ [8] |

From 18th of May 2012 Inc. Facebook joined stock-market, precisely NASDAQ. After joining stock-market also the incomings started to multiply and in 2012 the incomings were 5 billion dollars [9].

Correlation factor. Through this factor we find the strength of connections between outer investments in Facebook and increasing number of employees in this company. Strength will be analyzed only 3 years before Facebook joined stock-market. Correlation factor is as below:

$$r = \frac{\sum (x - \bar{x})(y - \bar{y})}{\sqrt{\sum (x - \bar{x})^2 \sum (y - \bar{y})^2}}$$

We will observe this factor in these years, 2009, 2010 and 2011, and calculations are shown below.

x-investments by series (values in millions)

y-employees number (values in millions)

n-number of years

| Years | x | y | $(x - \bar{x})$ | $(x - \bar{x})^2$ | $(y - \bar{y})$ | $(y - \bar{y})^2$ | $\frac{(x - \bar{x})}{(y - \bar{y})}$ |
|----------|-------|----------|-----------------|-------------------|-----------------|-------------------|---------------------------------------|
| 2009 | 200 | 0.001218 | -406.7 | 165404.9 | -0.000963 | 0.00000093 | 0.3921 |
| 2010 | 620 | 0.002127 | 13.35 | 178.2225 | -0.000055 | 0.0000000303 | -0.00074 |
| 2011 | 1.000 | 0.0032 | 393.35 | 154724.2225 | 0.001018 | 0.000001034 | 0.40043 |
| Σ | 1.820 | 0.006545 | 0 | 320307.335 | 0 | 0.00000197 | 0.792 |

$$\bar{x} = \frac{\sum x}{n} = \frac{1.820}{3} = 606.7 \qquad \bar{y} = \frac{\sum y}{n} = \frac{0.006545}{3} = 0.0022$$

$$r = \frac{\sum (x - \bar{x})(y - \bar{y})}{\sqrt{\sum (x - \bar{x})^2 \sum (y - \bar{y})^2}} = \frac{0.792}{\sqrt{320307.335 * 0.00000197}} = \frac{0.792}{\sqrt{0.631}} = \frac{0.792}{0.794} = 0.997 \approx 1$$

This result shows that there is a strong connection between increasing investments and increasing number of employees in company. Connection or correlation is almost perfect.

3. DEVELOPMENT TENDENCIES

In the table below we are showing investments by years, according to this we find development tendencies in Facebook.

| Month/Year | Sum (millions) of investments (y) | x (sign of period [10]) | x ² | xy | y _c |
|------------|-----------------------------------|-------------------------|----------------|----------|----------------|
| 2004 | 0.5\$ | -3 | 9 | -1.5 | -66.4 |
| 2005 | 12.7\$ | -2 | 4 | -25.4 | 16.48 |
| 2006 | 27.5\$ | -1 | 1 | -27.5 | 99.36 |
| 2007 | 300\$ | 0 | 0 | 0 | 182.24 |
| 2008 | 115\$ | 1 | 1 | 115 | 265.12 |
| 2009 | 200\$ | 2 | 4 | 400 | 348 |
| 2010 | 620\$ | 3 | 9 | 1860 | 430.88 |
| | Σ=1275.7 | Σ=0 | Σ=28 | Σ=2320.6 | Σ=1275.7 |

To find developing linear trend of Facebook we'll have to find a and b parameters, we find them from this system below:

$$\begin{aligned} \sum y &= na + b \sum x \\ \sum xy &= a \sum x + b \sum x^2 \end{aligned}$$

In the system equations above n shows real number of years, in this case 7. Based on the data from the table above we solve the above system.

$$\begin{aligned} 1275.7 &= 7a + b \cdot 0 \\ 2320.6 &= a \cdot 0 + 28b \\ 1275.7 &= 7a \\ 2320.6 &= 28b \\ a &= \frac{1275.7}{7} = 182.24 \\ b &= \frac{2320.6}{28} = 82.88 \end{aligned}$$

We substitute gained parameters a and b in trend function as below [11]:

$$y = a + bx = 182.24 + 82.88 \cdot x$$

We substitute x value in above equation and gain trend value:

$$y_c(2004) = 182.24 + 82.88 \cdot (-3) = 182.24 - 248.64 = -66.4$$

$$y_c(2005) = 182.24 + 82.88 \cdot (-2) = 182.24 - 165.76 = 16.48$$

$$y_c(2006) = 182.24 + 82.88 \cdot (-1) = 182.24 - 82.88 = 99.36$$

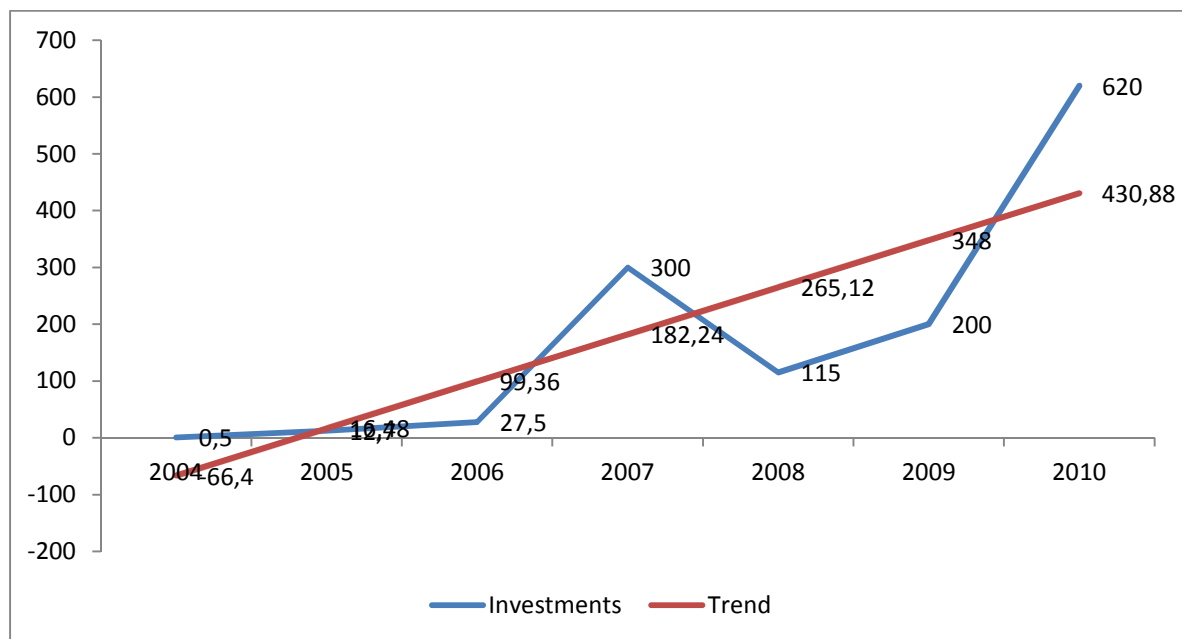
$$y_c(2007) = 182.24 + 82.88 \cdot 0 = 182.24 + 0 = 182.24$$

$$y_c(2008) = 182.24 + 82.88 \cdot 1 = 182.24 + 82.88 = 265.12$$

$$y_c(2009) = 182.24 + 82.88 \cdot 2 = 182.24 + 165.76 = 348$$

$$y_c(2010) = 182.24 + 82.88 \cdot 3 = 182.24 + 248.64 = 430.88$$

Let us graphically present investment and development trends in the context of years.



From the graphic above it is shown that tend of investments in company is linear, and based on the function of the trend we can make the investment forecast for a far longer period. So, if we wish to obtain the investment in a company for the year 2016, then the period sign must be 7 ($x=7$) and we calculate the investment for 2016:

$$y_c(2016) = 182.24 + 82.88 \cdot 7 = 182.24 + 414.4 = 762.4$$

By formula function we found that the trend of expected investments in companies is expected to be 762.4 million dollars.

4. CONCLUSIONS

Today in world a large number of social networks intend to socialize the youth. Apart them also professional networks and smaller networks exist for specific purposes. One of the most used networks is Facebook which is irreplaceable for youth socialization.

Connection between investments in Facebook from the outers has gone proportionally with the increasing number of employees, where connection factor (r correlation) is equal with 1. This shows that the creators of Facebook apart of their vision of development, information sharing and knowledge they have followed also precisely the logic of enterprise developing economy.

In 2012 Facebook has joined the stock-market so trend that we have shown in paper could not be the one because in stock-market you could win a lot more or you could lose it all in a rapid way.

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**PREDUZETNIŠTVO – SAMOZAPOŠLJAVANJE MLADIH U
IZABRANIM ZEMLJAMA SVETA, POUKE ZA SRBIJU**

**ENTREPRENEURSHIP – SELF EMPLOYMENT OF YOUNG PEOPLE
IN SELECTED COUNTRIES, LESSONS FOR SERBIA**

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Sažetak: *Analiza mera koje se primenjuju za razvoj preduzetništva mladih u izabranim zemljama sveta može pomoći u izboru i primeni podsticajnih mera u Srbiji. U radu su izdvojene evropske zemlje iz okruženja koje su imale sličan put prelaska iz socijalističkog sistema ka tržišnoj privredi. Međutim, sve treba shvatiti kao primere koje je potrebno prilagoditi specifičnim uslovima poslovanja i zahtevima privrede u našoj zemlji. Time će se izbeći veći troškovi i smanjiti neuspehi u sprovođenju podsticajnih mera za mlade preduzetnike.*

Ključne reči: *preduzetništvo, mladi, Srbija*

Abstract: *Analysis of the measures applied for the development of youth entrepreneurship in selected countries in the world can help in the selection and implementation of incentive measures in Serbia. In this paper, the European countries which had a similar path of transition, from the socialist system to the market economy, have been separated. However, everything should be understood as examples that need to be adapted to specific business conditions and requirements of the economy in our country. This will avoid higher costs and reduce failures in implementing incentive measures for young entrepreneurs.*

Keywords: *entrepreneurship, young entrepreneurs, Serbia*

UVOD

Preduzetništvo kao pojam sadrži preuzimanje inicijative, organizovanje i reorganizovanje društvenih i ekonomskih mehanizama i resursa, prihvatanje rizika ili neuspeha. Preduzetništvo je dinamičan proces povećanja bogatstva. To je spremnost da se preduzme inicijativa, preuzme rizik, osmatraju i realno procenjuju poslovne šanse. Sama definicija preduzetništva [1] sadrži sledeće delove:

1. 1.Preduzetništvo podrazumeva stvaranje nečeg novog;
2. 2.Preduzetništvo zahteva predanost u smislu vremena i napora. „Iako sam provodio sate u kancelariji radeći za drugog, kada sam postao preduzetnik - počeo sam neprekidno da razmišljam o poslovanju“;

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3. 3.Nagrade koje preduzetnici ostvaruju obuhvataju na prvom mestu nezavisnost, koja donosi lično zadovoljstvo. Nagrada igra bitnu ulogu za preduzetnike u profitnim organizacijama - za njih je novac pokazatelj postignutog uspeha;
4. 4.Preuzimanje rizika je najbitniji aspekt preduzetništva – stvaranje nečeg novog nema jasnu perspektivu, pa je ishod suštinski nesiguran. Nesigurnost dodatno pojačavaju inovacije koje su neophodne za prave preduzetničke akcije – stvaranje novih proizvoda, usluga, poduhvata. Preduzetnici se odlučuju na akciju uprkos nesigurnosti rezultata.

Preduzetništvo nije najrazvijenije u zapadnim zemljama tržišne ekonomije, već u manje razvijenim i siromašnijim zemljama. Sjedinjene Američke Države su pri dnu liste razvijenih zemalja u oblasti preduzetništva jer imaju samo 7,2 % samozaposlenih radnika, Luksemburg je na poslednjem mestu sa 6,1%. U Švedskoj je svaki deseti radnik samozaposleni preduzetnik, u Velikoj Britaniji je 14 %, a najveći broj preduzetnika-samozaposlenih je u Italiji 26,4%. U Srbiji su preko 90% svih privrednih društava mala i srednja preduzeća [2].

Sektor malih i srednjih preduzeća i preduzetništva je najefikasniji deo privrede, rasta i zapošljavanja. Preduzetništvo je jedan od načina za rešavanje problema nezaposlenosti mladih. Značaj malih preduzeća i procesa preduzetništva leži u upotrebi nove i savremene tehnologije i u fleksibilnosti malih preduzeća da se prilagode promenama na tržištu.

Preduzetništvo mladih zavisi od kulture, obrazovanja, ekonomskih uslova za život u zemlji. Uključivanje mladih u društvo traje dok se ne postigne određen prihvatljiv stepen samostalnosti i odgovornosti. Zaposlenje je značajan resurs u uslovima sve intenzivnijih promena na tržištu rada i visoke stope nezaposlenosti mladih osoba. Nesigurno i nepredvidivo tržište rada odlaže i produžava put od obrazovanja do zaposlenja, zbog potreba za dodatnim sticanjem znanja i kvalifikacija, prihvatanja zaposlenja koje je neregularno, potplaćeno ili deprofesionalizovano. Radnu sferu čini rizičnom i fleksibilnom i stalna potreba za promenama zanimanja da bi se održala konkurentnost na promenljivom tržištu rada [3].

Problematičan ulazak mladih u svet rada ima ozbiljne posledice po mlade ljude, uključujući rizik od siromaštva, gubljenje veština, iskustva. Put od škole do posla se mora olakšati kroz pomoć, subvencije za dobar početak u svetu posla što će pozitivno uticati na profesionalni i lični uspeh mladih ljudi.

Prema Nacionalnoj strategiji za mlade [4] u kontingent mladih osoba ulaze osobe od 15 do 30 godina starosti. Norme u svetu i Evropi, za mladu osobu su različite, razlike postoje i među zemljama u okviru EU. Za demografsku studiju uzeta je starosna granica prema normama EU, od 15 do 29 godina. Srbija je siromašnije društvo sa većim brojem nezaposlenih, posebno mladih, pa je granica „mladi“ pomerena, ali put ka razvijenim zemljama zahteva i prilagođavanje evropskim normama.

1. ANALIZA MERA ZA RAZVOJ PREDUZETNIŠTVA U IZABRANIM ZEMLJAMA SVETA

Analiza mera koje se primenjuju za razvoj preduzetništva mladih u izabranim zemljama sveta može pomoći u izboru i primeni podsticajnih mera u Srbiji. Izdvojene su evropske zemlje iz okruženja koje su imale sličan put prelaska iz socijalističkog sistema ka tržišnoj privredi. Međutim, sve treba shvatiti kao primere koje je potrebno prilagoditi specifičnim uslovima poslovanja i zahtevima privrede u našoj zemlji. Time će se izbeći veći troškovi i smanjiti neuspesi u sprovođenju podsticajnih mera za mlade preduzetnike.

Jedan od boljih primera za programe podrške mladima u preduzetništvu u svim delatnostima ima Mađarska [5]. U Mađarskoj je 1998. godine osnovana je neprofitna organizacija-Fondacija „The Hungarian Live Wire Foundation“ za unapređenje preduzetništva mladih od 18 do 32 godine starosti, kroz koju je do sada prošlo preko 15.000 mladih ljudi. Finansijska podrška je od strane kompanije Shell AG. Osnovne aktivnosti Fondacije su: organizovanje nacionalne mreže visoko kvalifikovanih savetnika koji mladima pružaju besplatne usluge savetovanja kod osnivanja i razvoja poslovanja; Izdavanje poslovnih vodiča; Edukacija kroz obuke; Marketinška podrška; Posredovanje u dobijanju kredita.

Postoje posebni programi za edukaciju mladih. Mladi se obučavaju kako da pripreme biznis planove i kako da obezbede kapital za početak posla. Da bi se proverila realnost njihovih preduzetničkih ideja organizuju se takmičenja svake godine. Nagrade su vrlo atraktivne za mlade buduće preduzetnike što je bitan početni podsticaj za ulazak na tržište. Kroz mentorstvo i saradnju Fondacije sa bankama potencijalni mladi preduzetnici mogu dobiti povoljne mikro-kredite. Mladi preduzetnik koji dobije mikro-kredit ostaje u kontaktu sa mentorom iz Fondacije koga obaveštava o poslovnom napretku preduzeća. Time mladi preduzetnik ima motiv da efikasno koristi kapital i uspešno izmiruje svoje obaveze prema banci. Fondacija redovno prati rezultate mladih i pomaže u razvijanju njihovih preduzetničkih veština.

U radu Fondacije za mlade preduzetnike kao problem se pojavljuje finansijska održivost. Fondacija zbog nestabilnih finansijskih sredstava zapošljava više volontera kao savetnike. Volonteri imaju ograničeno vreme za rad, nisu stalno angažovani u timskom radu, teško je pronaći volontere u manje razvijenim regionima zemlje što predstavlja prepreku u radu Fondacije. Za prevazilaženje ovog problema Fondacija za mlade u Mađarskoj povezuje se sa državnim institucijama - privredna komora, fond za razvoj preduzeća, vladinim i nevladinim organizacijama.

Austrija je zemlja koja podstiče razvoj preduzetništva mladih još od ranog nivoa školovanja. Posebno su zanimljivi programi koje je ova zemlja razvila za mlade u oblasti poljoprivrede.

- Program „Škola na farmi i farma u školi“ sproveden 2014. i 2015. godine organizovao je posetu dece i omladine farmama i posetu poljoprivrednika školama. Cilj je edukovanje mladih o značaju poljoprivrede i mogućnostima koje nudi bavljenje poljoprivredom. Uz podršku poslovnih partnera, štampanje biltena, marketinšku propagandu, sajmove i izložbe, projekat je imao uspeha u podizanju svesti mladih o značaju poljoprivrede kao ideji za samostalni biznis.

- Program „Mladi poljoprivrednici – nova snaga zemlje“ je realizovan 2014. godine u organizaciji Udruženja mladih poljoprivrednika Gornje Austrije. Akcenat ovog programa je na učešću mladih u obukama i radionicama o aktivnostima u proizvodnji hrane i drugih poljoprivrednih proizvoda. Ovaj program je praćen putem društvenih mreža, flajera, u stručnim časopisima.

- Program koji je u toku „Liveable, Austria, The new Rural Development 2020 programme“ ima za cilj promociju novog programa za ruralni razvoj. Koriste se izjave poljoprivrednika za podsticanje preduzetničkih poduhvata u oblasti poljoprivrede u Austriji, medijska kampanja, komunikacija sa lokalnim vlastima i javnošću. Za promociju ovog programa otvoren je zvanični sajt uz korišćenje društvenih mreža kako bi se približio mladima.

U Nemačkoj se kroz dva projekta pruža finansijska podrška mladim preduzetnicima. Za nove preduzetničke ideje je program „Bridging allowance“ koji pruža finansijsku podršku šest

meseci uz isplatu zarade za nezaposlene, plus olakšice u vidu plaćanja 68% poreza i doprinosa u tom periodu. Startup subvencije su finansijska podrška za one koji imaju nove poslovne ideje. Mesečna naknada za učesnike programa je 600 evra u prvoj godini, drugoj 360 evra i trećoj 240 evra mesečno. Kada preduzetnik zaradi 25.000 evra isplata se prekida. Od 2016. godine se sprovodi program subvencija koji obuhvata oba prethodno navedena programa. Isplaćuje naknade preduzetnicima i dodatak od 300 evra za doprinose do devet meseci što se može produžiti za još šest meseci ako se posao razvija. Formiraju se poslovni inkubatori za finansijsku i nefinansijsku podršku preduzetnicima. Krediti su od 500 do 5.000 evra uz nižu kamatnu stopu, pored finansijske pomoći obezbeđeno je besplatno korišćenje prostora na određen period, obuka i nedeljni seminari. Podaci pokazuju da skoro 90% kandidata uspe da realizuje svoje poslovne projekte, a 80% održi svoj posao posle šest meseci.

Bugarska je dobar primer tehnološkog inkubatora i fonda rizičnog kapitala za rane faze ulaganja – akcelerator Eleven. Akcelerator je osnovan u Sofiji 2012. godine i pruža mentorsku pomoć i prvu finansijsku pomoć. Finansiran je od strane Evropskog investicionog fonda i ima na raspolaganju 12 miliona evra sredstava. Eleven je jedan od najvećih investitora prvog stadijuma razvoja preduzetništva u Centralnoj i Istočnoj Evropi. Eleven podržava skoro 50 startup preduzeća kroz mentorstvo, poslovni prostor i prva finansijska sredstva. Prva etapa traje tri meseca i sastoji se od savetovanja i obuke za konkretizaciju poslovne ideje. Svake godine se organizuju putovanja u zemlje zapadne Evrope (Velika Britanija, Nemačka) sa ciljem da se mladi preduzetnici upoznaju sa potencijalnim investitorima i poslovnim partnerima. Preduzetnici zatim plasiraju svoj proizvod i prilagođavaju se tržištu. Akcelerator angažuje mentore iz svih sfera poslovanja (tehnologija, marketing, finansije, prodaja) koji prenose svoja lična iskustva. Ovaj mentorski rad nije vremenski ograničen.

Velika Britanija ima razvijen sistem podrške preduzetnicima u poljoprivrednom sektoru kroz povezivanje poljoprivrednika koji imaju neuposlene parcele, objekte, mehanizaciju sa mladim preduzetnicima koji nemaju resurse. Formiran je centar koji pruža obostranu podršku zemljoposjednicima i preduzetnicima. U Škotskoj se primenjuje model „Prince’s Scottish Youth Business Trust Programme“ (PSYBT) privatno javnog partnerstva u finansiranju poslovnih ideja za mlade preduzetnike. Ovaj model obezbeđuje mentorsku i finansijsku podršku u početnoj fazi i ranoj fazi rasta preduzeća. Program je namenjen mladima od 18 do 25 godina starosti koji poseduju ideju i rešenost za započinjanje sopstvenog biznisa. Model PSYBT je kombinacija finansijske podrške i usluga za razvoj poslovanja, kao što su obuka, mentorska podrška od dve godine. Finansiranje programa je mešovito, javni sektor, privatni sektor, evropski fondovi, lokalna samouprava. Praćenjem programa je utvrđena korist od 22 miliona funti i oko 500 novih radnih mesta na godišnjem nivou.

Velika Britanija ima dobro razvijen sistem preduzetničkih zona sa brojnim poreskim olakšicama. Preduzetničke zone su osnovane 2012. godine, registrovano je 635 preduzeća sa 24.000 zaposlenih. Uspeh programa doveo je do formiranja novih preduzetničkih zona. Pogodnosti za preduzeća u okviru preduzetničkih zona su: oslobađanje od poreza u visini od 275.000 funti na maksimum 5 godina; Pojednostavljena je procedura u dobijanju dozvola; Povlašćen položaj u dobijanju finansijske podrške Vlade; Potpuno oslobađanje od plaćanja poreza za preduzeća koja donose velike investicije u postrojenja i mašine u 8 zona u određenim regionima. Belgija, Holandija, Finska imaju razvijene modele finansiranja preduzetništva u kreativnoj industriji kroz razvoj inkubatora.

2. POLITIKA TRŽIŠTA RADA I MLADI U SRBIJI

Politika tržišta rada Srbije prepoznaje pasivan i aktivan pristup u rešavanju problema nezaposlenosti. Pasivni program prepoznaje sistem naknada za nezaposlenost u Srbiji i sastoji se samo iz komponente osiguranja i pomoći nezaposlenima.

Aktivni programi tržišta rada u Srbiji su podeljeni, uglavnom u tri glavne kategorije:

- 1) Podrška aktivnom traženju posla (posredovanje, povezivanje nezaposlenih sa slobodnim radnim mestima, informisanje, savetovanje);
- 2) Obuka na tržištu rada;
- 3) Programi za kreiranje poslova (subvencije, javni radovi, pomoć u samozapošljavanju)

Mere aktivne politike zapošljavanja usmerene ka unapređenju zaposlenosti, koje sprovodi NSZ su: 1) posredovanje u zapošljavanju lica koja traže zaposlenje; 2) profesionalna orijentacija i savetovanje o planiranju karijere; 3) subvencije za zapošljavanje; 4) podrška samozapošljavanju; 5) dodatno obrazovanje i obuka; 6) podsticaji za korisnika novčane naknade; 7) javni radovi; 8) druge mere usmerene ka zapošljavanju lica koja traže zaposlenje.

Izdvajamo sledeće realizovane programe u cilju zapošljavanja mladih. Najpre je potrebno je napomenuti program „Prva šansa“. Ovaj program je subvencionisao zapošljavanje pripravnika bez radnog iskustva sa završenom srednjom školom ili visokom školom mladih od 30 godina kod privatnih poslodavaca. Poslodavac je bio u obavezi da pripravnika zaposli na period od još godinu dana i da zadrži isti broj zaposlenih. Prema Arandarenku [6] pad nezaposlenosti sredinom 2009. godine bio je posledica uvođenja ovog programa koji je apsorbovao mlade nezaposlene ljude. 2011. godine zahvaljujući projektu „Prva šansa“ do posla je došlo oko 18.000 mladih osoba.

U 2012. i 2013. godini usled nedostatka sredstava, umesto ovog programa organizovana je stručna praksa koja je namenjena nezaposlenima bez radnog iskustva u struci i podrazumeva osposobljavanje za samostalan rad u struci bez zasnivanja radnog odnosa. Pored napred rečenog stručna praksa obuhvata i sticanje posebnih praktičnih znanja i veština za rad u struci. Trajanje programa je 6 meseci, a 2015. godine je angažovano oko 4.800 lica.

U 2015. godini obukom na zahtev poslodavca je bilo obuhvaćeno 505 osoba i to za oblasti kožarstva, tekstilne industrije i elektrotehnike. U obuke za tržište rada po ugovorima za 2015. godinu bila je uključena 761 osoba. Obuka se odnosila na trgovinu, ugostiteljstvo, turizam, ekonomiju, informacionu tehnologiju, strane jezike.

Projekat USAID-a (Američka agencija za međunarodni razvoj) za agrobiznis koji je počeo sa realizacijom 2008. godine doprineo je većem zapošljavanju mladih. Program je formiran u cilju promovisanja preduzetništvima među mladima u Srbiji. Skoro 1.250 studenata i učenika srednjih škola je tada prošlo kroz program obuke. USAID je tokom 2011. godine donirao 150.000 dolara bespovratnih sredstava za 12 mladih preduzetnika iz Srbije kako bi započeli sopstveni agrobiznis. U prethodna dva projekta ove agencije dodeljena su bespovratna sredstva od 220.000 dolara što je doprinelo otvaranju oko 100 novih radnih mesta. Projekti su usmereni i na jačanje ekonomske sigurnosti u siromašnim područjima za zapošljavanje mladih. Oko 20 opština Južne i Istočne Srbije je usvojilo planove za razvoj omladinskog preduzetništva.

Program u realizaciji EU (2014-2015) je „ Progres projekat - Ka većoj zaposlenosti kroz međusobno učenje s posebnim osvrtom na mlade i osetljive grupe“. U okviru projekta planirane

su radionice na kojima će se međusobno učiti kroz razmenu iskustava Francuske, Rumunije i RS u pogledu povećanja mogućnosti za zapošljavanje mladih i osetljivih grupa na tržištu rada.

Projekat „DAFF agrobiznis start-up za mlade“ koji je završen u decembru 2017. godine, obuhvatio je 17 mladih, a 13 mladih osoba je uspešno završilo i izradilo svoje biznis planove. U periodu od maja 2014. - avgust 2017. godine sproveden je „Projekat za unapređenje zapošljavanja marginalizovanih i ugroženih grupa, sa akcentom na Romkinje u Srbiji“ (nosilac projekta Nemačka organizacija Help). Projekat je obuhvatio Južnu i Zapadnu Srbiju. Odobreno je 483 zahteva za finansiranje, od toga 227 Romske populacije (119 žena). Nakon uključivanje u mere, 414 nezaposlenih osoba je pronašlo zaposlenje, 452 korisnika je učestvovalo u društveno korisnom radu, 56 mladih je prošlo program radne prakse od čega 19 žena, a 32 korisnika su zaposlena na minimum godinu dana (9 žena).

U toku 2017. godine sproveden je projekat razvoja privatnog sektora u jugozapadnoj Srbiji, u sektoru turizma. Rezultati su pokazali da se 67 od 76 polaznika zaposlilo po ugovoru o radu, ugovoru o privremenim i povremenim poslovima, preko omladinske zadruge.

Plan NSZ za 2018. godinu je bio da se kroz dva programa zaposli više od 6.000 ljudi. Planirano je da se 3.300 nezaposlenih obuhvati programom samozapošljavanja, a 2.710 nezaposlenih bi poslodavci zaposlili kroz subvencije. Program subvencija za poslodavce i preduzetnike kreće se od 150.000 do 300.000 dinara.

Subvencije za samozapošljavanje su u jednokratnom iznosu od 180.000, 200.000 za samozapošljavanje viškova zaposlenih ili 220.000 dinara za nezaposlene osobe sa invaliditetom. Udruživanje više nezaposlenih, osnivanje privrednog društva daje mogućnost za pojedinačno podnošenje zahteva i ostvarivanje prava na subvenciju.

Subvencije su namenjene i za zapošljavanje teže zapošljivih lica (mladi do 30 godina starosti bez ili niskih kvalifikacija, osobe koje traže posao duže od 12 meseci, Romi, osobe sa invaliditetom, žrtve porodičnog nasilja). Privatni sektor učestvuje u dobijanju ove vrste subvencija. Savetovanjem i informisanjem u vezi sa samozapošljavanjem, kao jednom od aktivnih mera, bilo bi obuhvaćeno 18.000 korisnika.

Dodeljuju se i bespovratna sredstva nezaposlenima, početnicima u poslovanju za nabavku opreme, rekonstrukciju za sanaciju poslovnog prostora, kao i za nabavku trajnih obrtnih sredstava. Istraživanje Ministarstva za rad, boračka i socijalna pitanja pokazuje da je 70% onih koji su u 2017. godini dobili subvencije za samozapošljavanje opstalo na tržištu i nastavilo sa poslovanjem. Evaluacija programa subvencija i podrške u zapošljavanju za 2018. godinu pokazaće rezultate kao i koji programi i koliko su efikasni [7].

ZAKLJUČAK

Iz navedenih primera podrške mladim preduzetnicima možemo zaključiti da su pomenute zemlje primenile ciljne programe podrške i pomoći, kvalitetno mentorstvo, finansijski su stabilni uz podršku Evropskih i Međunarodnih fondova uz vrlo angažovanu medijsku kampanju i preko društvenih mreža koje su vrlo bliske mladima. Svi programi su postigli uspehe i pozitivne rezultate u podsticanju preduzetništva mladih. Na primer, Austrija je svoje programe usmerila prema poljoprivredi (obuke, ogledne posete, neposredni kontakti sa preduzetnicima) što se može prilagoditi planu podrške i razvoja preduzetništva u delu Srbije koji je orijentisan na poljoprivrednu proizvodnju. Međutim, bez jasno definisanih prioriteta i razumevanja

specifičnih potreba mladih ne možemo kreirati i prilagoditi mere podrške i pomoći za mlade preduzetnike.

Tržišta rada u Srbiji se može okarakterisati kao tržište koje je umereno fleksibilno sa niskom sigurnošću, visokom nezaposlenošću mladih i visokim učešćem dugoročne nezaposlenosti. Izdvajanja za aktivne mere tržišta rada koja su nedovoljna i sistem naknada za slučaj nezaposlenosti ne otvaraju put ka radnim mestima. S obzirom na ograničena sredstva i indikativnu nezaposlenost mladih, neophodna je adekvatna evaluacija i ciljane aktivne mere i programi koji bi uticali na aktiviranje nezaposlenih. Reforma tržišta rada i institucija bez strukturnih i institucionalnih reformi ne mogu poboljšati performanse tržišta rada.

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DEVELOPMENT OF THE GENDER INEQUALITY IN FULL-TIME AND PART-TIME EMPLOYMENT

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Abstract: *Employment in a part-time position has been increasing during the past years. People preferred part-time positions over full-time positions. However, this differs depending on a gender and a country analysed. Therefore, the paper describes development of a full-time employment and a part-time employment in the European Union countries. Gender inequality in a full-time and a part-time employment was analysed as well. By comparing employment in a full-time and a part-time positions, we have discovered that women are employed more in part-time positions than men. However, gender inequality in both, a full-time employment and a part-time employment has been decreasing in analysed countries.*

Keywords: *gender, inequality, employment*

1. INTRODUCTION

Inclusion of women on the labour market has been increasing during the last two decades. However, their inclusion differs depending on their education, age, previous working positions or type of employment. Women are expected to take care of their household, which leaves them with less time available for employment. However, their participation on the labour market has been increasing. Women usually choose part-time employment, due to lack of time available. Even though, part-time employment is starting to be more attractive not only for women, but also for men. Therefore, we observe increase of part-time employment in the European Union for both genders.

By only observing tendency of part-time and full-time employment, we could not identify if this is due to women increased participation on the labour market or there are other factors that influence it. Therefore, we have calculated gender inequality indicator for both part-time and full-time employment and we analysed it's tendency. Extracting tendency of gender inequality from the tendency of the part-time and full-time employment, gave us clear picture of the gender inequality development in the European Union. We were also able to compare the strategies of the European union toward gender equality with actual results of its implementation.

The paper is structured as follows. We begin with literature review of the previous studies of the gender inequality in the labour market of the European Union. Consequently, gender inequality methodology was described, followed by the results of gender inequality across countries and time. Finally, we gave our conclusions.

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2. LITERATURE REVIEW

Existence of supranational organizations and their policy toward gender equality have huge effect on the countries social policies, that, together with effects from globalization, leads to creation of the harmonized social policy [1]. As a response to rigid policies of country, part-time employment has expanded. Companies employed part-time employees as a response to economic conditions in a country and due to lower labour costs [2]. Part-time employment is related with occupational attainment of the workforce, however, it has been proven that with higher rates of part-time employment, unemployment tends to be lower [3]. Inclination toward part-time employment is not only segregated by occupational attainment, but also by gender or country. Women presence in the labour market has been increased, mainly in the services sector, however, the levels of gender inequality differ across countries [4]. Increased presence of women on the labour market was due to married women entering labour market and choosing part-time employment after child-birth [5], [6]. The reason while women with children choose part-time employment is lack of time that makes them chose employment with flexible working hours or part-time employment [7]. Wage gender inequality was higher in countries with high rates of the part-time employment [8]. Wage inequality is higher among young people, and decreases with age. However, the opposite is true for those who migrated. Older employees who migrated were being worse off on the labour market [9].

The negative consequence of the part-time employment and gender inequality or both at the same time is the poverty of the retired people that worked in these conditions. Women are the majority in this group. Therefore, the decrease of the gender inequality is crucial for the well-being of the retired population [10]. Decrease of the gender inequality also led to decrease of the economic inequality across countries [11]. Economy would also benefit from the decreased levels of the gender inequality. For example, GDP would increase with the decreased levels of gender inequality [12].

The paper contributes to the literature by providing comparison of the gender inequality in part-time and full-time employment across European Union member countries and across time. It provides proof of average gender inequality in the part-time and full-time employment of the European Union member countries. The results of the paper are important, because provides information about gender inequality that was calculated and compared, employing the approach we propose as more accurate measurement method of the gender inequality.

3. DATA AND METHODOLOGY

We employed data from the OECD database of 28 European Union member countries. Data of employment rates in part-time and full-time employment disaggregated by gender, over the period 2000-2017, were employed.

Gender inequality rates were further calculated as follows. Let suppose that employment rate of women (E_f^*) is equal to the employment rate of men (E_m^*). Then gender equality would be concluded and the indicator of the gender equality would be set to zero,

$$E_m^* = E_f^* \Rightarrow GII^* = 0, \quad (1)$$

where GII^* is Gender Inequality Index (GII) by distinct types of the employments denoted by *. The asterix * denotes either part-time or full-time employment. It means, when we compare employment rates of women and men in part-time employment, the labeling would be $E_f^{part-time}$ for women and $E_m^{part-time}$ for men. When we compare full-time employment, the labeling would change to $E_f^{full-time}$ for women and to $E_m^{full-time}$ for men.

Further, if only men were employed, and no women, we would conclude absolute gender inequality in disadvantage of women (2), opposite inequality was denoted by (3) (women being employed and no men was employed)

$$E_m^* > 0 \wedge E_f^* = 0 \Rightarrow GII^* = 100, \quad (2)$$

$$E_f^* > 0 \wedge E_m^* = 0 \Rightarrow GII^* = -100. \quad (3)$$

Using equations (1), (2) and (3) the scale of gender inequality was set. Equation (1) suggests that gender equality is set to zero (employment rate of women and men are equal). If the employment rates of men were higher than employment rates of women, then the obtained value of the GII, would be a number higher than zero and less than 100 (equation (4)) or equal to 100 if only men were employed and no women. If the employment rates of women were higher than employment rates of men, then the obtained value of the GII, would be a number lower than zero and higher than -100 (equation (5)) or equal to -100 if only women were employed and no men.

$$E_m^* > E_f^* \Rightarrow GII^* = \left(\left(E_f^* / E_m^* \right) - 1 \right) \times (-100) \quad (4)$$

$$E_f^* > E_m^* \Rightarrow GII^* = \left(\left(E_m^* / E_f^* \right) - 1 \right) \times 100 \quad (5)$$

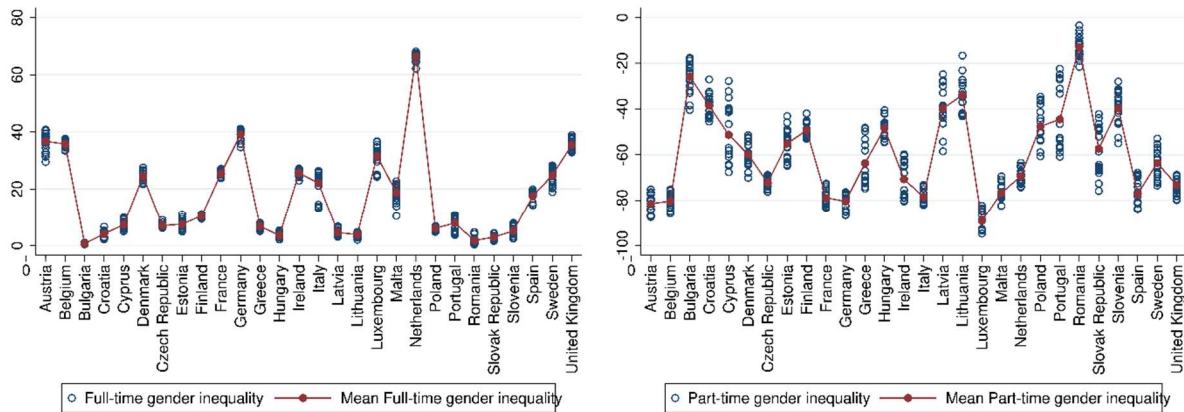
Using equations (4) and (5), gender inequality was measured as a ratio of the lower to higher employment rate, then subtracted from one and multiplied by -100 for equation (4), and by 100 for equation (5). By doing so, the gender inequality was being expressed as rate. Tendency of the gender inequality series was identified by employing Simple Linear Regression, where relevance of the results was validated using Coefficient of determination R^2 and ANOVA.

4. RESULTS

Employment gender inequality does depend on the employment type. In each European Union country, including United Kingdom, over the observed period 2000-2017, men were always employed more than women in the full-time employment, while women were always employed more than men in part-time employment. This evidence is in alignment with previous studies, that put women in part-time positions due to many reasons such as inclusion of the married women after child-birth on the labour force [6], which unable them to work full-time and gave them opportunity of flexible working hours [7]. We also found that this is true for the European Union member countries, by comparing mean gender inequality by type of the employment. Figure 1, depicts mean of gender inequality across distinct types of employment over the period 2000-2017. We observe that mean gender inequality was lower in full-time employment, and near to zero for almost half of the countries. This suggests, that European Union policy toward

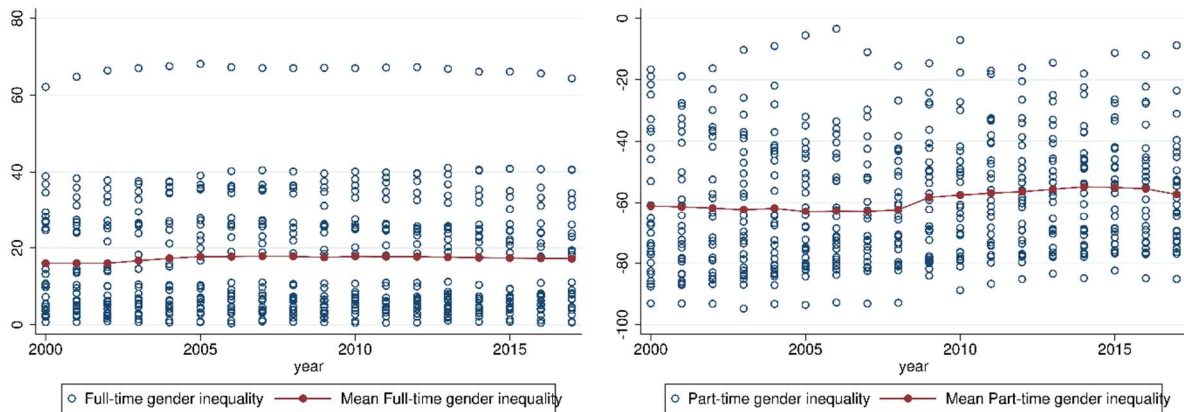
gender equality is effective, and the results are already notable in half of the European Union member countries. When observing gender inequality in part-time employment, we observe high levels of gender inequality for most of the European Union countries. However, Low levels of gender inequality were reported in Romania and Bulgaria. Not only gender inequality was higher in part-time employment, but variances were higher as well, indicating that gender inequality in part-time employment have been changing more than gender inequality in full-time employment.

Figure 1: Employment gender inequality in full-time and part-time employment across countries



In order to prove that gender inequality was steady in full-time employment and changeable in part-time employment, we analyzed it across time, which is presented in Figure 2. Mean gender inequality in full-time employment did not change over time. We observe that when it comes to time, mean gender inequality of the European Union in full-time employment was steady and near 20%, during the observed period (Figure 2). However, when analysing mean gender inequality in part-time employment, we observe decrease of gender inequality over time. We also observe structural break in gender inequality in part-time employment in year 2008, which could be due to economic crisis in this year. It appears that crisis have caused temporal decrease of gender inequality. Gender inequality in part-time employment was near 60% during the whole observed period, which suggests women domination of this type of employment (Figure 2).

Figure 2: Employment gender inequality in full-time and part-time employment over time



Further, we analyzed gender inequality of each country separately. We observe that in some countries such as Austria, Belgium, Germany and Luxembourg, gender inequality in part-time employment reaches more than 80% (Table 1), affirming that women dominate this type of employment. Note that these are all German speaking developed countries. On the other hand, Austria, Belgium and Germany were also countries with higher rates among European Union mean gender inequality rates of full-time employment, that made these country male friendly in full-time employment. However, the highest gender inequality in full-time employment was reported in the Netherlands, where men were employed more than women in this type by 66.371%. However, we should mention that full-time employment decreased by the end of the observed period to the half of its value from the beginning of the observed period. The lowest gender inequality in part-time employment has been found in Romania (12.838%), and then in Bulgaria (25.818) and curiously the lowest gender inequality in full-time employment was also reported in these two countries (Table 1), which are two neighboring Balkan countries. Low gender inequality in these two countries could be related with low part-time employment in these two countries, however the employment in full-time positions was among the highest in the European Union.

When differences were compared, we found that the highest differences in gender inequality were reported for the part-time employment. Gender inequality changes the most in Portugal, Cyprus and the Slovak Republic. The gender inequality substantially decreased in all of them, indicating increased presence of men in part-time employment. When the levels were compared, it was found that the gender inequality in part-time employment has been decreased by half in Slovak Republic and Portugal, and by two thirds in Cyprus, at the end of the observed period (Table 1). The highest differences in gender inequality in full-time employment were reported in Italy, Luxembourg, Malta and Austria, but unlike in part-time employment, in full-time employment gender inequality has increased. This fortified men presence in the employment in the full-time positions, and made them more men friendly than they were at the beginning of the observed period.

Tendency of the gender inequality in both types of employment revealed interesting results. In most countries, pattern was not describable, we could not conclude increase or decrease. However, there were countries where the trend could be identified. Gender inequality behaved differently based on analyzed country and the type of employment analyzed. When analyzing gender inequality in the full-time employment, we came to next conclusions. The fastest increase in gender inequality of 0.805% per year was reported in Italy, followed by Austria with 0.636% increase per year. Countries with lower increases of the gender inequality during the observed period were Czech Republic, Estonia, Germany, Greece, Hungary, Malta, Poland, Slovak Republic and Slovenia. While countries with higher decrease of gender inequality in full-time employment were Sweden with 0.510% decrease per year and Portugal with 0.466% decrease per year. Gender inequality in full-time employment also decreased in Croatia, Cyprus, France, Ireland, Romania and United Kingdom.

Table 1: Descriptive statistics of the full-time and part-time employment gender inequality

| Country | Full-time employment gender inequality | | | | | | | Part-time employment gender inequality | | | | | | |
|-----------------|--|-----------|--------|--------|--------|-----------|----------------|--|-----------|--------|---------|---------|-----------|----------------|
| | Mean | Std. Dev. | Range | Min. | Max. | β | R ² | Mean | Std. Dev. | Range | Min. | Max. | β | R ² |
| Austria | 36.705 | 3.491 | 11.286 | 29.499 | 40.785 | 0.636*** | 0.947*** | -81.405 | 4.432 | 12.412 | -87.549 | -75.136 | 0.813*** | 0.958*** |
| Belgium | 35.759 | 1.136 | 4.177 | 33.421 | 37.599 | 0.049 | 0.053 | -80.325 | 3.386 | 10.673 | -85.952 | -75.279 | 0.619*** | 0.952*** |
| Bulgaria | .719 | .176 | .612 | .475 | 1.087 | -0.007 | 0.047 | -25.818 | 6.719 | 22.737 | -40.401 | -17.664 | 0.073 | 0.003 |
| Croatia | 4.109 | 1.170 | 4.400 | 2.182 | 6.582 | -0.145*** | 0.437*** | -38.591 | 4.938 | 18.381 | -45.456 | -27.075 | 0.279 | 0.091 |
| Cyprus | 7.301 | 1.322 | 4.846 | 5.001 | 9.847 | -0.198*** | 0.636*** | -51.280 | 13.135 | 39.866 | -67.608 | -27.741 | 2.257*** | 0.842*** |
| Czech Republic | 7.001 | .762 | 2.815 | 6.148 | 8.962 | 0.107*** | 0.565*** | -72.247 | 2.274 | 7.435 | -76.226 | -68.791 | 0.342*** | 0.646*** |
| Denmark | 24.459 | 1.610 | 5.823 | 21.658 | 27.481 | -0.059 | 0.038 | -59.914 | 5.307 | 18.584 | -70.084 | -51.500 | 0.963*** | 0.939*** |
| Estonia | 7.487 | 1.613 | 6.064 | 4.898 | 10.961 | 0.201*** | 0.440*** | -55.072 | 6.486 | 21.731 | -64.832 | -43.101 | -0.515* | 0.180* |
| Finland | 10.411 | .548 | 1.806 | 9.376 | 11.182 | 0.048** | 0.219** | -49.341 | 3.171 | 11.082 | -53.013 | -41.930 | 0.506*** | 0.725*** |
| France | 25.468 | .886 | 3.286 | 23.801 | 27.087 | -0.155*** | 0.869*** | -78.818 | 3.522 | 10.738 | -83.383 | -72.646 | 0.638*** | 0.935*** |
| Germany | 39.098 | 2.005 | 6.417 | 34.659 | 41.077 | 0.321*** | 0.731*** | -80.403 | 3.625 | 10.378 | -86.765 | -76.387 | 0.642*** | 0.894*** |
| Greece | 6.767 | .845 | 2.795 | 5.081 | 7.875 | 0.108*** | 0.466*** | -63.628 | 9.512 | 26.590 | -74.797 | -48.207 | 1.516*** | 0.724*** |
| Hungary | 3.524 | .953 | 3.210 | 2.117 | 5.327 | 0.144*** | 0.646*** | -48.434 | 4.252 | 14.079 | -54.596 | -40.517 | -0.459** | 0.333** |
| Ireland | 25.592 | 1.116 | 4.234 | 22.930 | 27.164 | -0.141*** | 0.458*** | -70.683 | 8.249 | 20.668 | -80.459 | -59.791 | 1.360*** | 0.775*** |
| Italy | 22.077 | 4.800 | 13.138 | 13.222 | 26.360 | 0.805*** | 0.801*** | -78.454 | 3.318 | 8.906 | -82.107 | -73.200 | 0.402*** | 0.419*** |
| Latvia | 4.567 | 1.053 | 3.643 | 3.058 | 6.701 | 0.073 | 0.136 | -39.751 | 8.881 | 33.656 | -58.478 | -24.822 | -1.025*** | 0.380*** |
| Lithuania | 3.832 | .753 | 2.716 | 2.037 | 4.753 | 0.061* | 0.190* | -33.921 | 7.445 | 26.475 | -43.155 | -16.680 | -0.798** | 0.327** |
| Luxembourg | 31.567 | 3.766 | 12.373 | 24.301 | 36.674 | 0.245 | 0.121 | -89.162 | 4.455 | 12.358 | -94.748 | -82.390 | 0.729*** | 0.764*** |
| Malta | 18.740 | 3.272 | 12.379 | 10.364 | 22.743 | 0.494*** | 0.650*** | -76.711 | 3.800 | 12.972 | -82.447 | -69.474 | 0.371** | 0.272** |
| Netherlands | 66.371 | 1.422 | 5.987 | 62.121 | 68.108 | 0.025 | 0.009 | -69.353 | 3.551 | 10.690 | -74.255 | -63.565 | 0.654*** | 0.967*** |
| Poland | 6.054 | .512 | 2.031 | 4.791 | 6.822 | 0.057*** | 0.353*** | -47.637 | 7.854 | 25.978 | -60.654 | -34.677 | -1.438*** | 0.956*** |
| Portugal | 7.866 | 2.728 | 6.994 | 3.748 | 10.742 | -0.466*** | 0.830*** | -44.480 | 14.492 | 38.405 | -60.839 | -22.434 | 2.450*** | 0.815*** |
| Romania | 1.778 | 1.113 | 4.323 | .375 | 4.698 | -0.094* | 0.205* | -12.838 | 4.918 | 18.135 | -21.583 | -3.448 | 0.128 | 0.019 |
| Slovak Republic | 2.978 | .752 | 2.767 | 1.617 | 4.385 | 0.109*** | 0.598*** | -57.358 | 10.762 | 33.618 | -75.814 | -42.196 | 1.460*** | 0.525*** |
| Slovenia | 5.140 | 1.902 | 5.384 | 2.482 | 7.866 | 0.347*** | 0.950*** | -39.594 | 7.588 | 26.967 | -54.984 | -28.017 | -1.285*** | 0.817*** |
| Spain | 17.517 | 1.950 | 5.599 | 14.283 | 19.882 | 0.249*** | 0.466*** | -77.114 | 6.187 | 16.266 | -84.112 | -67.846 | 1.107*** | 0.912*** |
| Sweden | 24.849 | 2.962 | 9.335 | 18.934 | 28.269 | -0.510*** | 0.845*** | -63.566 | 6.436 | 20.516 | -73.449 | -52.933 | 1.197*** | 0.986*** |
| United Kingdom | 35.433 | 1.836 | 6.052 | 32.847 | 38.898 | -0.330*** | 0.920*** | -73.245 | 3.913 | 11.072 | -79.869 | -68.796 | 0.712*** | 0.943*** |

***Significant at level 0.01; **Significant at level 0.05; *Significant at level 0.1

(Note that the values of the significance of R-squared are from ANOVA tables)

Further, gender inequality in part-time employment was analyzed. Results revealed that there were also countries where behavioral pattern could not be identified. The highest decrease of gender inequality in part-time employment was reported in Portugal and Cyprus. Gender inequality has been yearly decreasing by 2.45% in Portugal, and by 2.257% in Cyprus. Gender inequality in part-time employment has been also decreasing in Austria, Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Luxembourg, Netherlands, Spain, Sweden and the United Kingdom. Even in majority of the countries, gender inequality was decreasing in part-time employment, they were also countries, where gender inequality has been increasing. The highest increase of gender inequality in part-time employment was reported in Poland by 1.438% per year and in Slovenia by 1.285% per year. They were then followed by Latvia, Lithuania, Hungary and Estonia (Table 1). As presented gender inequality is highly dependent on country analyzed.

5. CONCLUSION

Women were employed more than men in part-time employment, while men were employed more in full-time employment in all European Union member countries, over the period 2000-2017. However, when the levels of gender inequality were compared, higher gender inequality was reported in part-time employment which suggests women dominance in this type of employment. Gender inequality depends on country analyzed, however it did not change over time when mean gender inequality of the European Union was analyzed. Common pattern of gender inequality tendency was not found, and this was highly dependent on country analyzed.

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ISPITIVANJE KORELACIJE IZMEĐU POLA STUDENATA I OSOBINA USPEŠNIH PREDUZETNIKA

EXAMINATION OF THE CORRELATION BETWEEN STUDENTS' GENDER AND CHARACTERISTICS OF SUCCESSFUL ENTREPRENEURS

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Sadržaj: *U savremenim uslovima poslovanja sve je više žena preduzetnica, bez obzira na to što se preduzetničke veštine više pripisuju muškarcima. Cilj istraživanja je ispitati u kojoj meri se posmatrani uzorak studenata identifikuje sa osobinama uspešnog preduzetnika. Primenom deskriptivne metode, metode komparacije, metode uzorka i koeficijenta korelacije ispitan je stepen slaganja između posmatranih pojava. U sprovedenom istraživanju učestvovalo je 82 studenata oba pola Visoke poslovne škole strukovnih studija. Anketa je sačinjena po ugledu na Scheinin deskriptivni indeks.*

Ključne reči: *Preduzetnik, razlike među polovima, studenti, osobine, korelacija*

Abstract: *In modern business conditions, more and more women are entrepreneurs, regardless of the fact that entrepreneurial skills are more attributed to men. The aim of the research is to examine to what extent the observed sample of students is identified with the characteristics of a successful entrepreneur. Using the descriptive method, method of comparison, sampling method and the correlation coefficient, the degree of agreement between the observed phenomena was examined. In the conducted research, 82 students participated in both sexes of the Higher Business School of Vocational Studies. The survey was made on the basis of Schein's descriptive index.*

Keywords: *Entrepreneur, gender differences, students, properties, correlation*

1. UVOD

Mala i srednja preduzeća su pokretači razvoja svake privrede. Međutim, ona nisu podržana od strane društva kada naiđe težak period. Zbog toga se svake godine veliki broj malih preduzeća osniva, ali i gasi. Dugi niz godina je preduzetništvo zakonom bilo predodređeno samo za muškarce. U savremenom svetu, posebno u razvijenim zemljama, žene imaju jednaka prava sa muškarcima u pogledu radnog angažovanja i sticanja obrazovanja, za razliku od zemalja u razvoju gde postoji verovatnoća da to nije tako zbog čega su česti programi podrške ženskom preduzetništvu od strane brojnih organizacija i institucija. Razvoj ženskog preduzetništva može doprineti prosperitetu čitave društvene zajednice. Programi obrazovanja na visokoškolskim ustanovama koji u sebi obuhvataju i preduzetništvo, pored

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znanja, studentima pružaju razne obuke i veštine.[1] Zbog toga je predmet istraživanja ovog rada ispitivanje sklonosti studenata i studentkinja jedne poslovne škole ka preduzetništvu.

2. MUŠKO VS. ŽENSKO PREDUZETNIŠTVO

Istraživanje zatupljenosti ženskog preduzetništva započeto je tek nakon osamdesetih godina dvadesetog veka.[2] Prema Brush-u žene preduzetnici se razlikuju od muškaraca preduzetnika u pogledu obrazovanja, radnog iskustva, radne motivacije i okolnosti koje ih navode na pokretanje sopstvenog biznisa.[3] Po prirodi, postoji razlika između pripadnika ova dva pola tako da je očekivano da se različito ponašaju u preduzetničkoj ulozi. Žene preduzetnici, u odnosu na muškarce, započinju biznis sa manjim kapitalom kako bi se manje izložile početnom riziku.[4] Kada je u pitanju donošenje odluka, muškarci lakše donose odluke, dok je ženama potrebno malo više vremena. Preduzetnici su više orijentisani na zadatke i bitnije im je da su troškovi pod kontrolom i da se ostvaruje profit, dok preduzetnice teže da daju svoj društveni doprinos, postignu kvalitet i održe dobre odnose sa zaposlenima.[5] Prema istraživanju Birley-a muškarci i žene susreću se sa sličnim poteškoćama prilikom pronalaženja izvora finansiranja, mada neki autori veruju da su žene u prednosti jer mogu iskoristiti svoj šarm i tako lakše doći do uspeha. Kada je u pitanju bračni status, evidentno je da su žene izložene većem pritisku od muškaraca s obzirom na tradicionalnu ulogu koju žena ima u porodici. Takođe, za razliku od muškaraca, a kada je u pitanju pokretanje biznisa, žene preferiraju oblast trgovine i usluga.[6]

Na osnovu podataka Global Entrepreneurship Monitor zapaža se da se procenat učešća žena u preduzetništvu u odnosu na muškarce povećava u Evropi, dok se u smanjuje u Latinskoj Americi, a u Africi i Aziji nestaje i to samo u pojedinim regionima.[7] Kada je reč o ženskom preduzetništvu kod nas, ono najčešće započinje u slučaju nezaposlenosti, nedovoljnih primanja za izdržavanje porodice, siromaštva i slično.[8] Međutim, imajući u vidu zatečeno stanje na tržištu i u privredi Republike Srbije da se primetiti da i muškarci započinju biznis vođeni sličnim motivima. Kao posebna karakteristika uspešnog preduzetnika ističe se posedovanje emocionalne inteligencije. Rezultati brojnih istraživanja na tu temu pokazuju da su menadžeri koji saosećaju sa svojim zaposlenima uspešniji lideri. Goleman je u svom istraživanju ukazao na značaj empatije kao sastavnog dela emocionalne inteligencije za uspeh menadžera, što je u svom istraživanju potvrdila i George.[9] Na osnovu rezultata dosadašnjih istraživanja, u proseku, žene imaju prosečan koeficijent emocionalne inteligencije koji je za četiri boda iznad koeficijenata emocionalne inteligencije kod muškaraca. Žene imaju bolje rezultate u odnosu na muškarce kada je u pitanju vladanje sobom, društvena svest i međuljudski odnosi gde je ta razlika 10 bodova. Samosvest je podjednako zastupljena kod oba pola ispitanika.[10]

3. CILJ I METODE ISTRAŽIVANJA

3.1. CILJ ISTRAŽIVANJA

Cilj istraživanja je ispitati u kojoj meri se posmatrani uzorak studenata identifikuje sa osobinama uspešnog preduzetnika. Istraživanje nastoji da dokaže ili opovrgne sledeće hipoteze:

Hipoteza 1: Postojanje pozitivne korelacije između ličnih karakteristika studenata i osobina uspešnih preduzetnika.

Hipoteza 2: Ne postojanje korelacija između ličnih karakteristika studenata i osobina uspešnih preduzetnika.

Hipoteza 3: Postojanje značajne korelacije između ličnih karakteristika studenata i osobina uspešnih preduzetnika.

3.2. UZORAK ISPITANIKA

Uzorak čini 82 studenata, od toga 24 studenata i 58 studentkinja, svih godina osnovnih i specijalističkih strukovnih studija Visoke poslovne škole strukovnih studija u Leskovcu. Online upitnik je distribuiran preko Facebook grupa za studente svake godine strukovnih studija i studenti su dobrovoljno učestvovali u istraživanju.

3.3. METODE

U ovim istraživanju korišćen je Scheinin deskriptivni indeks (SDI) koji se sastoji od 92 opisne karakteristike koje se mogu pripisati jednoj osobi.[11] Ovaj indeks se često primenjuje kada se želi ispitati uticaj rodnih stereotipa, a u ovom istraživanju uz pomoć njega ispitali smo koliko se studenti identifikuju sa osobinama uspešnih preduzetnika. Za svaku navedenu karakteristiku u anketnom upitniku ispitanici su davali odgovore u intervalu od 1 (nimalo me karakteriše) do 5 (karakteriše me u velikoj meri). Ukoliko su studenti davali ocene preko 4 smatramo da ih odgovarajuća tvrdnja u potpunosti karakteriše, ocene od 3 do 4 da ih delimično karakteriše i ocene do 3 uopšte ih ne karakteriše. U analizi, a za potrebe dokazivanja pretpostavljenih hipoteza, korišćen je koeficijent linearne korelacije koji predstavlja meru jačine linearne veze između dve varijable, X i Y.[12] Pirsonov koeficijent linearne korelacije je broj koji pokazuje pravac i jačinu statističke veze između dve posmatrane varijable.[13] Ukoliko je vrednost dobijenog koeficijenta korelacije manja od 0,2 postoji niska direktna korelacija, od 0,2 do 0,5 postoji nezatna direktna korelacija, od 0,5 do 0,7 postoji znatna direktna korelacija, od 0,7 do 0,9 visoka direktna korelacija i preko 0,9 veoma visoka direktna korelacija.[14] Pomenute tvrdnje važe i za predznak minus s tom razlikom što je tada reč o inverznoj korelaciji.

3.4. REZULTATI ISTRAŽIVANJA I DISKUSIJA

Na osnovu rezultata istraživanja u tabeli 1 prikazane su karakteristike sa kojima se studentkinje najviše identifikuju. Veća ocena odgovara većem stepenu identifikacije.

Tabela 1: Osobine koje najviše karakterišu studentkinje (Izrada autora)

| <i>Karakteristika</i> | <i>Prosečna vrednost</i> | <i>Karakteristika</i> | <i>Prosečna vrednost</i> |
|--|--------------------------|-----------------------------|--------------------------|
| Vrednujete prijatnu okolinu | 4,57 | Čvrsti | 4,19 |
| Uredni | 4,60 | Brzi | 4,00 |
| Iskreni | 4,55 | Poseđujete humane vrednosti | 4,55 |
| Ljubazni | 4,64 | Srdačni | 4,19 |
| Emocionalno stabilna ličnost | 4,26 | Marljivi | 4,17 |
| Zainteresovani za sopstveni izgled | 4,12 | Ambiciozni | 4,05 |
| Inteligentni | 4,07 | Poslušni | 4,36 |
| Uporni | 4,22 | Želite odgovornost | 4,36 |
| Energični | 4,24 | Samokontrolisani | 4,50 |
| S jakim potrebom za sigurnošću | 4,12 | Skromni | 4,43 |
| Veseli | 4,57 | Odlučujući | 4,34 |
| Sposobni ste da odvojite osećanja od ideja | 4,07 | Direktni | 4,24 |
| Kompetentni | 4,07 | Stabilni | 4,36 |
| Puni razumevanja | 4,59 | Samopouzđani | 4,12 |

| | | | |
|----------------------------------|------|------------------------------------|------|
| Društveni | 4,34 | Od pomoći ste | 4,59 |
| Posedujete visoko samopoštovanje | 4,21 | Sa snažnom potrebom za postizanjem | 4,24 |
| Zahvalni | 4,71 | Velikodušni ste | 4,45 |
| Svesni osećanja drugih | 4,60 | Vođeni logikom | 4,00 |
| Objektivni | 4,05 | Ljubazni | 4,69 |
| | | Samopouzđani | 4,12 |

Iz tabele 1 uočava se da se studentkinje identifikuju sa osobinama koje se tradicionalno pripisuju ženama (ocene preko 4), kao što su empatija, kolektivno rešavanje problema, strpljenje, društvenost i slično.[15] Međutim, identifikuju se i sa osobinama koje se tradicionalno pripisuju muškarcima kao što su snažna potreba za postizanjem, čvrstina, ambicioznost i slično. U tabeli 2 prikazane su karakteristike sa kojima se studentkinje najmanje identifikuju.

Tabela 2: Osobine koje najmanje karakterišu studentkinje (Izrada autora)

| <i>Karakteristika</i> | <i>Prosečna vrednost</i> |
|------------------------|--------------------------|
| Plušljivi | 2,28 |
| Neiskreni | 1,55 |
| Neozbiljni | 2,00 |
| Bojažljivi | 2,34 |
| Vulgarni | 1,52 |
| Agresivni | 1,72 |
| Podložni uticajima | 2,17 |
| Pasivni | 2,19 |
| Danguba ste i oklevate | 1,72 |
| Obmanjivi | 1,90 |
| Ogorčeni | 1,60 |
| Sebični | 1,48 |
| Nesigurni | 2,52 |
| Pokorni | 2,50 |
| Egzibicionista | 2,83 |
| Stidljivi | 2,76 |
| Prenagljeni | 2,78 |
| Nervozni | 2,72 |
| Povučeni | 2,55 |

Iz tabele 2 uočava se da se studentkinje ne identifikuju sa nekim osobinama koje se tradicionalno pripisuju muškarcima kao što su vulgarnost, egzibicionizam i agresivnost, ali većina osobina sa kojima se studentkinje ne identifikuju pripisuje se ženama. U tabeli 3 prikazane se karakteristike sa kojima se student najviše identifikuju.

Tabela 3: Osobine koje najviše karakterišu studente (Izrada autora)

| <i>Karakteristika</i> | <i>Prosečna vrednost</i> | <i>Karakteristika</i> | <i>Prosečna vrednost</i> |
|---|--------------------------|---------------------------------------|--------------------------|
| Radoznali | 4,04 | Objektivni | 4,08 |
| Simpatični | 4,04 | Čvrsti | 4,29 |
| Hrabri | 4,13 | Brzi | 4,38 |
| Vrednujete prijatnu okolinu | 4,67 | Posedujete humane vrednosti | 4,17 |
| Uredni | 4,42 | Poznajete načine funkcionisanja sveta | 4,33 |
| Iskreni | 4,29 | Srdačni | 4,08 |
| Ljubazni | 4,54 | Marljivi | 4,04 |
| Emocionalno stabilna ličnost | 4,38 | Dobro informisani | 4,08 |
| Zainteresovani za sopstveni izgled | 4,25 | Ambiciozni | 4,04 |
| Nezavisni | 4,00 | Samokontrolisani | 4,46 |
| Inteligentni | 4,42 | Skromni | 4,04 |
| Uporni | 4,25 | Odlučujući | 4,38 |
| Energični | 4,25 | Direktni | 4,17 |
| Snažni | 4,00 | Samouvereni | 4,33 |
| Konkurentni | 4,00 | Stabilni | 4,17 |
| Veseli | 4,38 | Samopouzđani | 4,33 |
| Sposobni ste da izdvojite osećanja od ideja | 4,29 | Taktični | 4,04 |
| Kompetentni | 4,25 | Od pomoći ste | 4,54 |
| Puni razumevanja | 4,42 | Sa snažnom potrebom za postizanjem | 4,04 |
| Društveni | 4,25 | Velikodušni | 4,33 |
| Posedujete visoko samopoštovanje | 4,25 | Vođe | 4,25 |
| Zahvalni | 4,42 | Ljubazni | 4,58 |
| Svesni osećanja drugih | 4,25 | Samopouzđani | 4,17 |

Na osnovu podataka iz tabele 3 primećuje se da se studenti identifikuju sa više ponuđenih karakteristika od studentkinja i da su pretežno to karakteristike tipične za muškarce. Ipak, ono što treba istaći je da se kod oba pola ispitanika javljaju 32 karakteristike, a to su: čvrsti, brzi, srdačni, marljivi, posedujete humane vrednosti, uredni, iskreni, ljubazni, emocionalno stabilna ličnost, zainteresovani za sopstveni izgled, ambiciozni, samokontrolisani, vrednujete prijatnu okolinu, uporni, energični, veseli, kompetentni, puni razumevanja, društveni, zahvalni, sposobni da izdvojite osećanja od ideja, posedujete visoko samopoštovanje, svesni ste osećanja drugih, skromni, odlučujući, direktni, samouvereni, stabilni, samopouzđani, inteligentni, velikodušni, sa snažnom potrebom za postizanjem. Studentkinje se identifikuju sa svega 41 karakteristikom, dok se studenti identifikuju sa 46 karakteristika. Može se reći da se više od dve trećine identifikovanih karakteristika prepoznaje kod oba pola ispitanika, sa tom razlikom što je kod studenata dominantnije maskuline karakteristike. Karakteristike koje se smatraju rodno neutralnim, kao što su: marljivost, ljubaznost, urednost i slično, identifikovane su kod oba pola ispitanika. Karakteristike koje se u literaturi pripisuju preduzetnicima, a prepoznate su kod oba pola ispitanika, odnose se na emocionalnu stabilnost, upornost, energičnost, kompetentnost, samouverenost, samopouzđanje, inteligenciju, odlučnost, snažnu potrebu za postignućem i slično. U tabeli 4 prikazane su karakteristike sa kojima se studenti najmanje identifikuju.

Tabela 4: Osobine koje najmanje karakterišu studente (Izrada autora)

| <i>Karakteristika</i> | <i>Prosečna vrednost</i> |
|-----------------------------------|--------------------------|
| Plaćljivi | 2,00 |
| Nesigurni | 2,17 |
| Pokorni | 1,92 |
| Neiskreni | 1,75 |
| Neozbiljni | 2,33 |
| Bojažljivi | 1,83 |
| Kolebate se prilikom odlučivanja | 2,46 |
| Vulgarni | 2,00 |
| Agresivni | 1,63 |
| Podložni uticajima | 2,00 |
| Pasivni | 2,04 |
| Stidljivi | 2,38 |
| Danguba ste i oklevate | 1,96 |
| Nerado ispoljavate agresiju | 2,88 |
| Rezervisani | 2,75 |
| Niste sujetni u vezi svog izgleda | 2,88 |
| Prenagljeni | 2,96 |
| Nervozni | 2,71 |
| Obmanjivi | 1,50 |
| Ogorčeni | 1,88 |
| Sebični | 1,79 |
| Povučeni | 2,54 |

Na osnovu podataka iz tabele 4 uočava se da je 18 zajedničkih karakteristika sa kojima se najmanje identifikuju i studenti i studentkinje (od 22 karakteristike kod studenata i 19 karakteristika kod studentkinja gde, u odnosu na karakteristike koje izostaju kod studenata, nije prisutan samo egzibicionizam). U tabelama 5 i 6 prikazane su ocene osobina uspešnih preduzetnika date od strane studenata i studentkinja.

Tabela 5: Osobine uspešnih preduzetnika prema studentima (Izrada autora)

| <i>Karakteristika</i> | <i>Prosečna vrednost</i> | <i>Karakteristika</i> | <i>Prosečna vrednost</i> |
|-------------------------------|--------------------------|--|--------------------------|
| Radoznali | 4,50 | Brzo se oporavljate od emocionalnih poremećaja | 4,33 |
| Dosledni | 4,25 | Čvrsti | 4,67 |
| Simpatični | 4,38 | Brzi | 4,17 |
| Hrabri | 4,67 | Intuitivni | 4,00 |
| Posedujete lidere sposobnosti | 4,13 | Posedujete humane vrednosti | 4,50 |
| Vrednujete prijatnu okolinu | 4,25 | Poznajete način funkcionisanja sveta | 4,17 |
| Uredni | 4,88 | Srdačni | 4,42 |
| Kreativni | 4,42 | Dobro informisani | 4,58 |
| Iskreni | 4,29 | Ambiciozni | 4,79 |
| Ljubazni | 4,88 | Poslušni | 4,13 |

| | | | |
|--|------|------------------------------------|------|
| Emocionalno stabilna ličnost | 4,54 | Želite odgovornost | 4,63 |
| Zainteresovani za sopstveni izgled | 4,54 | Samokontrolisani | 4,58 |
| Željni prijateljstva | 4,13 | Skromni | 4,50 |
| Inteligentni | 4,71 | Odlučujući | 4,71 |
| Uporni | 4,92 | Direktni | 4,33 |
| Energični | 4,79 | Samouvereni | 4,21 |
| Govorljivi | 4,29 | Stabilni | 4,63 |
| Sa jakim potrebom za sigurnošću | 4,00 | Samopouzđani | 4,54 |
| Snažni | 4,21 | Nije Vam lako povrediti osećanja | 4,21 |
| Konkurentni | 4,50 | Taktični | 4,25 |
| Veseli | 4,54 | Od pomoći ste | 4,54 |
| Sposobni ste da odvojite osećanja od ideja | 4,00 | Sa snažnom potrebom za postizanjem | 4,75 |
| Kompetentni | 4,75 | Velikodušni | 4,21 |
| Puni razumevanja | 4,67 | Vođe | 4,33 |
| Društveni | 4,63 | Vešti u poslovnim pitanjima | 4,17 |
| Posedujete visoko samopoštovanje | 4,00 | Ljubazni | 4,92 |
| Zahvalni | 4,71 | Samopouzđani | 4,58 |
| Svesni osećanja drugih | 4,13 | | |

Tabela 6: Osobine uspešnih preduzetnika prema studentkinjama (Izrada autora)

| <i>Karakteristika</i> | <i>Prosečna vrednost</i> | <i>Karakteristika</i> | <i>Prosečna vrednost</i> |
|------------------------------------|--------------------------|--|--------------------------|
| Radoznali | 4,31 | Brzo se oporavljate od emocionalnih poremećaja | 4,60 |
| Dosledni | 4,33 | Čvrsti | 4,90 |
| Imate veliku potrebu za vladanjem | 4,24 | Brzi | 4,66 |
| Simpatični | 4,21 | Intuitivni | 4,64 |
| Hrabri | 4,78 | Posedujete humane vrednosti | 4,55 |
| Posedujete liderske sposobnosti | 4,84 | Poznajete načine funkcionisanja sveta | 4,78 |
| Uredni | 4,86 | Srdačni | 4,52 |
| Kreativni | 4,79 | Marljivi | 4,67 |
| Iskreni | 4,48 | Dobro informisani | 4,71 |
| Ljubazni | 4,79 | Ambiciozni | 4,74 |
| Emocionalno stabilna ličnost | 4,84 | Niste sujetni u vezi svog izgleda | 4,38 |
| Zainteresovani za sopstveni izgled | 4,40 | Poslušni | 4,28 |
| Nezavisni | 4,67 | Želite odgovornost | 4,76 |
| Inteligentni | 4,88 | Samokontrolisani | 4,69 |
| Uporni | 4,78 | Skromni | 4,72 |
| Energični | 4,84 | Odlučujući | 4,90 |
| Sofisticirani | 4,38 | Direktni | 4,53 |
| Govorljivi | 4,71 | Autoritativni | 4,53 |
| S jakim potrebom za sigurnošću | 4,48 | Samouvereni | 4,72 |
| Snažni | 4,78 | Stabilni | 4,78 |
| Analitični | 4,55 | Samopouzđani | 4,76 |

| | | | |
|--|------|------------------------------------|------|
| Konkurentni | 4,69 | Nije vam lako povrediti osećanja | 4,21 |
| Veseli | 4,71 | Dominantni | 4,41 |
| Imate veliku potrebu za autonomijom | 4,53 | Taktični | 4,50 |
| Sposobni ste da odvojite osećanja od ideja | 4,47 | Od pomoći ste | 4,69 |
| Kompetentni | 4,64 | Sa snažnom potrebom za postizanjem | 4,84 |
| Društveni | 4,67 | Velikodušni | 4,40 |
| Posedujete visoko samopoštovanje | 4,34 | Vođeni logikom | 4,64 |
| Zahvalni | 4,62 | Vešti u poslovnim pitanjima | 4,16 |
| Egzibicionisti | 4,16 | Ljubazni | 4,97 |
| Svesni osećanja drugih | 4,48 | Samopouzđani | 4,60 |
| Objektivni | 4,72 | | |

Na osnovu analize tabela 5 i 6 zapaža se da se 47 od 55 tvrdnji studenata poklapa sa 44 od 63 tvrdnje studentkinje o tome koje osobine treba da ima jedan uspešan preduzetnik. Na osnovu toga možemo zaključiti da studenti i studentkinje posmatraju uspešnog preduzetnika na skoro isti način. Takođe, može se reći da dominiraju osobine koje se tradicionalno pripisuju muškarcima.

Tabela 7: Korelacija između ličnih karakteristika studenata i karakteristika preduzetnika
(Izrada autora)

Correlations

| | | M | M_P |
|-----|---------------------|--------|--------|
| M | Pearson Correlation | 1 | ,938** |
| | Sig. (2-tailed) | | ,000 |
| | N | 92 | 92 |
| M_P | Pearson Correlation | ,938** | 1 |
| | Sig. (2-tailed) | ,000 | |
| | N | 92 | 92 |

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

Tabela 8: Korelacija između ličnih karakteristika studentkinja i karakteristika preduzetnika
(Izrada autora)

Correlations

| | | Ž | Ž_P |
|-----|---------------------|--------|--------|
| Ž | Pearson Correlation | 1 | ,855** |
| | Sig. (2-tailed) | | ,000 |
| | N | 92 | 92 |
| Ž_P | Pearson Correlation | ,855** | 1 |
| | Sig. (2-tailed) | ,000 | |

| | | |
|---|----|----|
| N | 92 | 92 |
|---|----|----|

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

Od ukupno 63 osobine koje su studentkinje pripisale uspešnom preduzetniku, 36 prepoznaju kod sebe, dok su studenti od 55 osobina, za koje smatraju da ih uspešan preduzetnik poseduje, prepoznali kod sebe 43 osobine.

Tabela 9: Prosečna vrednost, standardna devijacija i korelacija između ličnih karakteristika i karakteristika preduzetnika (Izrada autora)

| | M | SD | r |
|---|------|-------|------------------------------|
| Kako studenti ocenjuju sebe | 3,59 | 0,87 | Pearsoonov koeficijent 0,938 |
| Kako studenti ocenjuju osobine preduzetnika | 3,72 | 1,095 | |
| Kako studentkinje ocenjuju sebe | 3,60 | 0,86 | Pearsoonov koeficijent 0,855 |
| Kako studentkinje ocenjuju osobine preduzetnika | 3,85 | 1,29 | |

Na nivou značajnosti od 0,01, a na osnovu prethodnih tabela, uočava se da postoji veoma visoka direktna korelacija između karakteristika studenata i osobina koje bi trebalo preduzetnici da poseduju prema mišljenju studenata ($r = 0,938$). Takođe, na nivou značajnosti od 0,01, uočava se da postoji visoka direktna korelacija između karakteristika studentkinja i osobina koje bi prema njima trebalo da poseduje jedan preduzetnik ($r = 0,855$). Na osnovu ovakvih rezultata analize, na nivou značajnosti od 0,01, možemo prihvatiti prvu i treću hipotezu, a odbaciti drugu hipotezu.

Tabela 10. Koeficijent korelacije između procena osobina preduzetnika od strane studenata i studentkinja

| Correlations | | |
|--------------|---------------------|--------|
| | M_P | Ž_P |
| M_P | Pearson Correlation | 1 |
| | Sig. (2-tailed) | ,936** |
| | N | ,000 |
| Ž_P | Pearson Correlation | ,936** |
| | Sig. (2-tailed) | 1 |
| | N | ,000 |
| | N | 92 |

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

Na nivou značajnosti od 0,01, a na osnovu prethodne tabele, uočava se da postoji veoma visoka direktna korelacija između procena osobina uspešnih preduzetnika prema mišljenju studenata i prema mišljenju studentkinja ($r = 0,936$). To bi značilo da studenti i studentkinje dele mišljenje o tome kakva je ličnost uspešan preduzetnik. Osobine koje su naveli studenti, a nisu navele studentkinje su: puni razumevanja, vođe, željni prijateljstva i vrednujete prijatnu okolinu. Osobine koje su navele studentkinje, ali ne i studenti su: velika potreba za vladanjem, marljivost, nezavisni, autoritativni, sofisticirani, nisu sujetni u vezi svog izgleda, analitični, dominantni, vođeni logikom, egzibicionisti, objektivni i sa velikom potrebom za autonomijom.

4. ZAKLJUČAK

Ovo istraživanje je sprovedeno sa ciljem da se ispita u kojoj meri se posmatrani uzorak studenata identifikuje sa osobinama uspešnog preduzetnika. Potvrđene su dve hipoteze: postoji pozitivna korelacija između ličnih karakteristika studenata i osobina uspešnih preduzetnika i u pitanju je veoma visoka korelacija, što potvrđuje rezultate istraživanja drugih istraživača u ovoj oblasti. Kao ograničenje u ovom istraživanju posebno se ističe činjenica da se studenti nisu odazvali u velikom broju. Anketa je plasirana u okviru četiri Facebook grupe gde ima ukupno 1124 studenata od kojih svaku grupu čine studenti jedne godine studija. Anketni upitnik ima dosta pitanja, pa kao jedan od mogućih razloga može biti vreme koje bi studenti trebali da izdvoje da odgovore na postavljena pitanja. Takođe, uslovi kao što je dostupnost računara i interneta mogu biti ograničavajući faktori. Studenti koji su učestvovali u istraživanju su iz južnog dela Republike Srbije, pa je preporuka da se u daljim istraživanjima uključe lica sa drugih područja Republike Srbije, kao i da se poveća veličina uzorka. Jedan od predloga za dalje istraživanje odnosi se na upoređivanje sklonosti studenata ka preduzetništvu na početku studija i nakon njihovog završetka kako bi se ispitalo koliko studije doprinose njihovom opredeljenju u tom pravcu.

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A LOCAL PERSPECTIVE ABOUT STUDENTS' ENTREPRENEURSHIP. EVIDENCE FROM ROMANIA

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Abstract: *The paper is part of a larger research into inclusive entrepreneurship in Romania as a driver of local development. In this context, this paper focuses on youth entrepreneurship issues, specifically students' entrepreneurship and examines the push and pull factors of entrepreneurial intention of students in Romania. Starting from the analysis of the literature on the formal and entrepreneurship education as determinants of youth entrepreneurship, the paper presents the Bihor County of Romania context regarding employment, entrepreneurship and entrepreneurship education and the results of a quantitative research based on a questionnaire applied to a group of 136 students from the University of Oradea, Romania. The research findings outline a local perspective about the motivations and obstacles that influence the entrepreneurial intentions of students and students' perception regarding university courses and services able to stimulate their entrepreneurial potential. The paper ends with recommendations for improving the formal and informal entrepreneurial education opportunities, services and facilities offered by the University of Oradea according with local needs in order to encourage students' entrepreneurship and to increase the number of graduates who consider starting a business and self-employment in the field of graduate studies as a viable option for insertion into the labour market.*

Keywords: *youth entrepreneurship, students' entrepreneurship, entrepreneurship education, local development, Bihor County, Romania.*

1. BACKGROUND

Despite criticism of the difficulty to properly evaluate its impact, formal and entrepreneurship education is one of the most important determinants of youth entrepreneurship. As OECD argues, "if individuals cannot develop the necessary human capital to run a business, it is difficult to see how they can successfully run a business" [1]. In the European Union, in 2016, although more than 40% of youth would prefer to be self-employed over working as an employee, only 4.1% of working youth were self-employed [2]. This unrealized entrepreneurial potential, as showed OECD and EC, is explained by many barriers that young people face, including a lack of entrepreneurship skills [2].

The access to finance is the most debated obstacle for youth entrepreneurship, as Parker [3] have shown, but local context with specific social and cultural aspects such as: social relations, social networks, enterprise culture, entrepreneurial education facilities, support structures,

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policies and programmes etc. better explains the nuances of young people's exclusion from entrepreneurship, as show Casson et al. [4], Dejaeghere, Wiger and Willemsen [5], Sikenyi [6], Onu [7] etc.

The relevance of entrepreneurship education in the development of students' enterprise potential is approached by numerous studies in literature. Casson et al. [4] and Parker [3] demonstrated the positive relation between university education and entrepreneurial decision, respectively between the rate of new businesses initiation and the share of population with higher education. Although some authors, for example Bae et al. [8], argues that the relationship between entrepreneurship education and post education entrepreneurial intentions is not significant, the role of formal and entrepreneurship education as determinant of youth entrepreneurship is highlighted by numerous empirical case studies. For example, according to Carvalho et al. [9], the familiarity within the context of small businesses and the educational experiences that present entrepreneurship as a career option are the most important in fostering enterprise potential of Portuguese students [9]. According to Sharma [10], the lack of formal education programs specialized in entrepreneurship and the inclination of universities to prepare students for jobs, inadequate content of the subject and ineffective teaching methodology are the major barriers identified for case of Uttarakhand state, India. In case of Romanian universities, as show Szabo and Marian [11], Ceptureanu and Ceptureanu [12], Vilcov and Dimitrescu [13], Leovaridis, Frunzaru and Cismaru [14], Frunzaru and Leovaridis [15], the emphasis must be on practical aspects of entrepreneurship education in order to put students in the position to conceive and implement a business plan, the preponderantly theoretical nature of formal Romanian education being most often blamed [11], [12], [13], [14], [15].

In this context, the present paper examines students' entrepreneurial intention as result of formal and entrepreneurship education in the specific economic context of Bihor County, Romania. Our analysis is part of a larger research into inclusive entrepreneurship in Romania as a driver of regional development [16], [17] and related with our previous research about entrepreneurship education [18], [19].

2. LOCAL CONTEXT. BIHOR COUNTY OF ROMANIA

In 2016, although Bihor County has an employment rate (71.6%) that is 5% higher than the national average, the monthly average net nominal earning of 1,396 lei is among the counties with the lowest average salary level, which is the main vulnerability of the local economy [20]. Even if the unemployment rate in Bihor – 2.39%, is at half of the average unemployment rate in Romania, the situation of young people does not differ from the one existing at the national level: of the total number of 6,507 unemployed persons, most of them are young (under 25 years) – 1,473 persons, respectively, low education (primary, secondary and vocational) – 4,875 persons and with a duration of unemployment between 3 and 6 months [21]. The share of the unemployed is 4 times higher in the rural area than in the urban area, Oradea has the lowest share of the unemployed compared to the stable population (18-62 years) -0.39% [21].

The economic context of Bihor County is particularly attractive for entrepreneurship. Between 2016 and 2017, the net number of business start-ups increased by 47.85% in Bihor County [22]. In Bihor County, most start-ups are classified as mixed farms combining crops and livestock farming (9%), followed by start-ups performing road haulage (6%) and hairdressing and beauty salons (5%) [23]. At the territorial level, the business environment in Bihor County is concentrated in the urban environment, especially in the Oradea Metropolitan Area. At the level

of Oradea, most local businesses are active in the services sector (44.2%), followed by the wholesale and retail sector (34%), construction (9%), industry (10.47%) and agriculture (1,46%) [24]. The economic activities that achieved the most significant turnover at the level of the local active units in Oradea are: trade, manufacturing, transport and storage, construction and professional, scientific and technical activities [25].

Oradea is one of the main university centres in Romania, ranking 10th as the number of enrolled students. There are 4 universities in Oradea, namely: University of Oradea, Agora University, Partium Christian University of Oradea, Emanuel University of Oradea. Of these, the University of Oradea, the only public university, is the most important in terms of the number of students (over 18,000) and study programs (159). The existing formal and other entrepreneurial education opportunities at the local level are linked to higher economic education and concentrated almost exclusively at the University of Oradea - Faculty of Economic Sciences (see **Table 1**). The other private universities each have 1 Bachelor's Degree program linked also to the economic education, while the rest are private companies, associations and foundations – private training providers, offering a limited range of training programs, namely: Common competences - Entrepreneurial skills. According to the Bihor County Agency for Payments and Social Inspection, the Register of authorized suppliers of entrepreneurial skills courses includes 12 suppliers in Bihor County [26].

Table 1: Formal and entrepreneurship education opportunities provided by the University of Oradea – Faculty of Economic Sciences

| Type of education opportunities | Field of study / Study program / Course/Other | Department/ Faculty |
|--|--|---|
| Bachelor's Degree | Business Administration Economy of Commerce, Tourism and Services , full time education and distance learning, 3 years, 180 credits Business Administration (in English), full time education, 3 years, 180 credits | Economic Sciences and Business / Faculty of Economic Sciences |
| | Economics and International Business/ International Business , full time education and distance learning, 3 years, 180 credits International Business , (in English), full time education and distance learning, 3 years, 180 credits | International Business / Faculty of Economic Sciences |
| | Management full time education and distance learning, 3 years, 180 credits | Management and marketing/ Faculty of Economic Sciences |
| Master | Business Administration/ Internal and International Business Administration on the SMES ; Master type: Research | International Business/ Faculty of Economic Sciences |
| | Master in International Business Administration (in English Language), Type of Studies: Full Time Education, 120 credits; Master type: Professional | Economics and Business/ Faculty of Economic Sciences |
| | Business Administration , | Economics and Business/ |

| | | |
|---|---|--|
| | <p>Regional Business Administration, Master type: Research Type of Studies: Full Time Education, 120 credits</p> <p>Economics and Business Administration in Tourism and Hospitality Industry; Master type: Professional, Type of Studies: Full Time Education, 120 credits</p> <p>Master in Business Administration (in English Language), Type of Studies: Full Time Education, 120 credits, Master type: Professional</p> | Faculty of Economic Sciences |
| | <p>Master in Advanced Management (in English Language), Type of Studies: Full Time Education, 120 credits, Master type: Professional</p> | Management and Marketing/ Faculty of Economic Sciences |
| Doctoral | <p>Doctoral School of Social Sciences – Economics Course: Creativity, innovation and entrepreneurship</p> | Faculty of Economic Sciences |
| Postgraduate training and continuing professional development programs | <p>Business Administration Entrepreneurship and business administration, 11 credits / 90 hours</p> <p>Business Administration in the tourism industry, 8 credits / 60 hours</p> <p>Business plan, 4 credits / 20 hours</p> | Faculty of Economic Sciences |
| Further education courses | <p>Business Administration / The Entrepreneurial School–Business Start-Up (72 hours)</p> <p>The Entrepreneurial School – Business Development (72 hours)</p> | Faculty of Economic Sciences |
| Summer schools | <p>Summer school Companies - Students - Faculties connected together for a better absorption on the labour market</p> | Faculty of Economic Sciences |
| Extra-curricular activities | <p>Students’ Business Plans Competition 2017 FSE Business Cup</p> <p>International/EU funded projects with entrepreneurship education components</p> <p>StartUP ROSE</p> | Faculty of Economic Sciences and students’ association |
| Practice-based learning | <p>Practice Internship programs</p> | Faculty of Economic Sciences |

Regarding the advisory services for start-ups, our analysis shows that at the local level, except for the Bihor Chamber of Commerce and Industry, there are no permanent institutional structures providing services and facilities to create a start-up. Nevertheless, there are several private suppliers of entrepreneurial skills courses that offer advisory services for start-ups. Also,

we identified that European Social Fund supported projects implemented in Bihor County have been the most significant in the field of business support, an interesting example is AntrES project recognized by the European Commission as success story and best practice [27]. The AntrES project key to success is the integrated approach, based on Action Learning method, "role models" and universities-local governments network that tailored the training for local development needs.

3. METHODOLOGY

The quantitative research is conducted on 136 students who attended formal education and other entrepreneurship education opportunities at University of Oradea, Faculty of Economic Sciences (as shown in the **Table 1**), with different professional status. In order to investigate students' entrepreneurial intention as result of formal and entrepreneurship education and students' perception regarding university supply able to stimulate their entrepreneurial potential, with the intention of generalizing the results at the level of Romania, the research instrument which was used is questionnaire. Questionnaire had 17 closed, open and multiple choice items which covered 4 areas: general information about student; information about students' perception on entrepreneurial skills and how to acquire them through formal and entrepreneurial education; information about students' entrepreneurial intentions (the intention to start a business as an option for insertion into the labour market, the previous experiences of starting a business, the business idea or business field, the educational experiences, motivations and determinants that they consider relevant to the implementation of the entrepreneurial intention); information about students' perception on obstacles to starting a business and how to overcome them through education for entrepreneurial skills and university support. The questionnaire was applied both on paper and on-line to a total of 170 students, with a response rate of 80% (136 validated answers). The analyses were made using SPSS statistical package. The general distribution of the data is shown in the **Table 2** below.

Table 2: Distribution of respondents by general socio-demographic characteristics

| <i>Aspects related socio-demographic characteristic</i> | <i>No. of respondents</i> | <i>Percentage</i> |
|---|---------------------------|-------------------|
| Age | | |
| 19-23 years | 131 | 96.3% |
| 24-37 years | 5 | 3.7% |
| Gender | | |
| Male | 26 | 80.9% |
| Female | 110 | 19.1% |
| Area of residence | | |
| Urban | 91 | 66,9% |
| Rural | 45 | 33,1% |
| Level of study | | |
| Bachelor's Degree | 120 | 88.24% |
| Masters | 16 | 11,76% |
| Professional status | | |
| Student | 71 | 52,2% |
| Student looking for a job | 26 | 19,11% |
| Employed student | 29 | 21,32% |
| Graduate looking for a job | 2 | 1,47% |

| | | |
|----------------------------------|----|---------|
| Graduate employee | 8 | 5,88% |
| Personal income per month | | |
| Less than 100 Euro | 69 | 50,73 % |
| Between 101 and 650 Euro | 64 | 47,05 % |
| Higher than 650 Euro | 3 | 2.2% |

4. MAIN FINDINGS

Students' perception on entrepreneurial skills and how to acquire them through formal and entrepreneurial education surprised us. Students consider that they have various entrepreneurial skills, as shown in the **Table 3** below.

Table 3: Distribution of respondents by the perception on their entrepreneurial skills

| <i>Entrepreneurial skills</i> | <i>No. of respondents</i> | <i>Percentage</i> |
|--|---------------------------|-------------------|
| The ability to work in a team | 105 | 77,2% |
| Spirit of initiative and organization | 96 | 70,6% |
| Can use the computer in managing economic issues | 60 | 44,1% |
| The ability to organize work | 60 | 44,1% |
| The ability to carry out a business plan | 57 | 41,9% |
| Can establish and delegate tasks and duties | 54 | 39,7% |
| Can relate to the public | 51 | 37,5% |
| Can process and analyze information for decision-making | 49 | 36% |
| Know the necessary steps to start a business | 43 | 31,6% |
| Can self-assess the need for further training | 41 | 30,1% |
| Can draw up specific economic documents | 40 | 29,4% |
| Have effective communication skills in business | 36 | 26,5% |
| Understand the duties delegated to someone else | 33 | 24,3% |
| Have the ability to track and manage product portfolios | 32 | 23,5% |
| Can identify and recognize the specific economic problems of a company | 29 | 21,3% |
| Have the capacity to perform certain tasks in the economic field on specific posts | 22 | 16,2% |
| Have the capacity to execute and implement an economic plan | 12 | 8,8% |

Thus, although over 70% of the surveyed students consider themselves able to work in a team and have a spirit of initiative and organization, only slightly over 40% consider themselves able to develop a business plan and only 8.8% able to implement an economic plan, while only 31.6% say they know the steps needed to set up a business. On the other hand, students give the greatest importance to formal education to acquire entrepreneurial skills. Students consider that they have acquired entrepreneurial skills through the following paths: university curriculum (72.8%); participating in formal and informal entrepreneurial courses (or courses oriented towards entrepreneurship) and entrepreneurial education activities organized within the university (33.8%); practice/internship activities within a company (27.9%); the family model that gave them these skills because at least one parent has their own business (23.5%).

Regarding the intention to start their own business, most of them, i.e. 47.1%, intend to initially seek employment in order to further develop the experience gained through their internship; 28.7% intend to start their own business in the near future, though not in the first year after graduation; 12.5% do not want to start their own business because they want to seek employment; 9.6% are very determined to seriously consider this perspective as soon as they finish their studies; 9.6% do not want to start their own business; 4.4% will start their own business and have already begun to take the necessary steps in this direction. The students who have started their own business and those who intend to start a business are considering various fields from wood processing, agriculture, ecological farms to creative industries; most of the answers relate to the field of services: catering, accounting, transport, trade, tourism and travel agencies, organizing events, consultancy services, pharmacy, human resources, beauty services, photography etc.

Students' decision to start a business was or will be determined by various determinants as shown in the **Table 4** below.

Table 4: Distributions of respondents by the determinants of the decision to start a business

| <i>Determinants of the decision to start a business</i> | <i>No. of respondents</i> | <i>Percentage</i> |
|---|---------------------------|-------------------|
| The entrepreneurial skills they have and which they acquired through university studies | 71 | 52.7% |
| Entrepreneurial skills acquired through extracurricular activities: entrepreneurial skills courses, internships, etc. | 45 | 33.1% |
| The family that supports them in starting their own business | 36 | 26.5% |
| An unsatisfactory salary at the future job | 25 | 18.4% |
| The fact that they will not find a job suitable for their level of training | 8 | 5.9% |
| Too heavy work conditions in the future job | 8 | 5.9% |
| Unsatisfactory relationships with bosses/ supervisors and / or colleagues from the future job | 6 | 4.4%. |

Students consider relevant to the implementation of their entrepreneurial intention the following experiences: practice or internship programs (64.7%); access to information with and about family businesses and the fact that they have an entrepreneurial model in the family (33.8%); experience as an employee at a company in the study field (27.2%). Although 23.5% of the respondents consider relevant the theoretical and practical activity performed in the specialized disciplines, none of the respondents managed to identify at least 3 decisive disciplines that formed their entrepreneurial skills.

The financial independence is the most important motivation for 72.8% of surveyed students to start their own business followed by the satisfaction of gaining professional success (66.9%). Other reasons that influence the entrepreneurial intentions of students are: optimism, high self-confidence and self-determination in the desire to materialize wishes (44.15%); increasing the level of work satisfaction by creating and managing their own business (36.8%); desire for autonomy and risk assumption (31.6%); have organizational and managerial skills (15.4%); university education (14.7%); the family context - one of the parents initiated and developed a business (6.6%).

On the other hand, the main obstacles that influence the entrepreneurial intentions of students are presented in the **Table 5** below.

Table 5: Distribution of respondents by the main obstacles that influence their entrepreneurial intentions

| <i>Obstacles that influence the entrepreneurial intentions of students</i> | <i>No. of respondents</i> | <i>Percentage</i> |
|--|---------------------------|-------------------|
| Access to finance (Lack of financing sources for start-up) | 89 | 65.4% |
| Lack of advisory services for start-ups | 89 | 65.4% |
| Lack of business support structures and access to certain facilities for young entrepreneurs | 63 | 46.3% |
| Lack of entrepreneurial skills development | 53 | 39% |
| Lack of legislative predictability | 48 | 35.3% |
| Lack of tax incentives for young entrepreneurs | 46 | 33.8% |
| High competition | 38 | 27.9% |
| High bureaucracy | 37 | 27.2% |
| Lack of information and support strategies for young entrepreneurs | 31 | 22.8% |
| Lack of people's acceptance and respect considering the age of the young entrepreneurs | 17 | 12.5% |
| Lack of confidence in their own abilities | 14 | 10.3% |
| Difficulties in combining family and professional life | 11 | 8.1% |

Students' perception regarding university courses and teaching methods able to stimulate their entrepreneurial potential is highlighted by the following students' recommendations as shown in the **Table 6** below.

Table 6: Distribution of respondents by their recommendations regarding university courses and teaching methods able to stimulate their entrepreneurial potential

| <i>Students' recommendations regarding university courses and teaching methods able to stimulate their entrepreneurial potential</i> | <i>No. of respondents</i> | <i>Percentage</i> |
|--|---------------------------|-------------------|
| Incorporating entrepreneurial learning programs with a practical component in the university curriculum | 95 | 69.9% |
| Giving increased importance to practice/internship activities in the specialized field | 84 | 61.8% |
| Changing teaching-learning methods to ones based more on practical applicability and acquisition of practical skills | 69 | 50.7% |
| Increasing the number of courses/subjects related to entrepreneurship for all fields of study | 55 | 40.4% |
| Promoting entrepreneurship as a possible career alternative | 53 | 39%. |

In order for students who want to start their own business to have the courage to take this step, the respondents think that the university needs to improve its services, as is shown in the **Table 7** below.

Table 7: Distribution of respondents by the student's opinion regarding the necessary university services in order to support students' entrepreneurship

| <i>Student's opinions regarding necessary university services in order to support students' entrepreneurship</i> | <i>No. of respondents</i> | <i>Percentage</i> |
|---|---------------------------|-------------------|
| A permanent support structure offering personalized counselling and career guidance services - through which to help students discover and develop their entrepreneurial skills | 94 | 69.1% |
| An advisory centre for students who want to start their own business | 78 | 57.4% |
| A permanent information point about starting a business, which would make it easier to get information regarding start-ups and financing opportunities | 57 | 41.9% |
| A business incubator for students to encourage innovative start-ups and provide specific facilities | 52 | 38.2% |

4. CONCLUSIONS

The research findings outline a local perspective about the motivations and obstacles that influence the entrepreneurial intentions of students and students' perception regarding education opportunities and services able to stimulate their entrepreneurial potential. We can say that our analysis shows that formal and entrepreneurial education is an important determinant of Romanian students' entrepreneurial intentions but there is still much to be done to improve the offer of universities in this direction, even more as our analysis was aimed at Economics students who benefited from a relatively richer supply of entrepreneurship courses, opportunities, services. The students' entrepreneurial intentions in the near future are, in our opinion, rather timid. The most important push factor is, as we expected, financial independence, but surprising, the limited access to finance is on the same level as the lack of advisory services as pull factors in students' perception. We take this into account on the Romanian higher education system, even the economic one, which teaches students how to become employees, not entrepreneurs or self-employed. Student recommendations for improving the educational entrepreneurial services speak for themselves. In the near future, we aim to test the results by applying the questionnaire to other universities in Romania and also in all fields of study.

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USKLAJEVANJE DELA IN DRUŽINE KOT POKAZATELJ KAKOVOSTI ŽIVLJENJA

WORK-LIFE BALANCE AS A LIFE QUALITY INDICATOR

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Povzetek: *Eden od pomembnih dejavnikov, ki vplivajo na kakovost življenja je tudi usklajeno delovno in družinsko življenje. Na uspešnost usklajevanja delovnega in družinskega življenja vplivajo številni dejavniki tako na ravni posameznika kot na ravni organizacije, v kateri je zaposlen in tudi države, ki s svojimi politikami ustvarja bolj ali manj ugodne pogoje za usklajevanje dela in družine. Na podlagi kritičnega pregleda literature in predhodnih raziskav predstavljamo celovito analizo koncepta usklajevanja dela in družine kot pokazatelja kakovosti življenja.*

Ključne besede: *usklajevanje dela in družine, kakovost življenja, management človeških virov*

Abstract: *One of the important factors that affect the quality of life is a balance between work and family life. The success of balancing of work and family life is influenced by many factors both at the individual and at the organizational level in which he is employed, as well as the country which, with its policies, creates more or less favorable conditions for balancing of work and family life. Based on a critical review of literature and preliminary research, we present a comprehensive analysis of the concept of work-family balance as a life quality indicator.*

Keywords: *work-family balance, life quality, human resource management*

1. UVOD

Ključni sferi v življenju vsakega odraslega sta delo in družina in obe sta za posameznika pomembni. Usklajevanje obeh v današnjem času in hitrem tempu življenja ni vedno lahka naloga, zato je usklajevanje zahtev in obveznosti delovnega in družinskega življenja, pomembna in aktualna tema tako splošnih pogovorov med ljudmi, kot tema številnih znanstvenih raziskav. Problemi povezani z delom/življenjem ter usklajevanjem različnih sfer vplivajo na vse, ne glede na njihovo stopnjo izobrazbe, spol, dohodek, družinsko strukturo, poklica, rase, starosti, statusa dela ali vere [1], se pa posamezniki različno s tem soočajo.

Usklajevanje dela in družine je tudi eden od pomembnih dejavnikov, ki vplivajo na kakovost življenja. Konflikt med delom in družinskim življenjem namreč lahko vodi v stres in druge z zdravjem povezane težave, na drugi strani pa usklajeno delovno in družinsko življenje vpliva na kakovost in zadovoljstvo tako v delovnem kot zasebnem življenju. Po podatkih OECD Slovenija dobro rangira po nekaterih merilih blaginje oziroma kakovosti življenja. Med drugim

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je nad povprečjem OECD glede indeksa usklajevanje dela in družine. Vendar pa so po drugi strani na splošno Slovenci manj zadovoljni z življenjem kot je povprečje OECD [2].

Na uspešnost usklajevanja delovnega in družinskega življenja vplivajo številni dejavniki tako na ravni posameznika kot na ravni organizacije, v kateri je zaposlen in tudi države, ki s svojimi politikami ustvarja bolj ali manj ugodne pogoje za usklajevanje dela in družine. Za usklajeno delo in družino mora namreč biti izpolnjenih več pogojev: pravična porazdelitev skrbstvenih in gospodinjstkih obveznosti med staršema (v dvostarševskih družinah), ustrezna socialna infrastruktura, ter ustrezni ukrepi za usklajevanje dela in družine, ki jih morata sprejeti in izvajati tako država kot delodajalci.

V nadaljevanju predstavljamo področje usklajevanja dela in družine kot pokazatelja kakovosti življenja na podlagi analize literature in predhodnih raziskav. Predstavljeni bodo ključni dejavniki na ravni posameznika kot sta spol in starševstvo, ključni dejavniki na ravni organizacije ter dejavniki na ravni države, ki vplivajo na usklajevanje dela in družine. Prispevek tako ponuja celovito analizo koncepta usklajevanje dela in družine kot dejavnika kakovosti življenja.

2. USKLAJEVANJE DELA IN DRUŽINE

Termin usklajevanje dela in življenja ima tri komponente – »delo«, »življenje« in »usklajevanje« [3]. Delo je v kontekstu usklajevanja dela in življenja/družine točno definirano in sicer kot plačano delo, torej službo [4] oziroma namensko človekovo aktivnost, ki je usmerjena k zadovoljevanju človekovih potreb in želja [5]. »Življenje« po drugi strani pa naj bi bile vse aktivnosti izven dela [3] oziroma bolj natančno dejavnosti zunaj plačanega dela, ki vključujejo dejavnosti v gospodinjstvu ter s prijatelji, družino in skupnostjo [6].

Večina raziskav se osredotoča in omejuje predvsem na družino in s tem povezane zahteve, ostale domene življenja (npr. prosti čas, sprostitev, udejstvovanje v skupnosti, učenje, vera,...) pa so deležne manj pozornosti [7]. Problem usklajevanja dela in družine je širok pojem in ga je možno obravnavati z več vidikov, psihološkega, sociološkega, vidika spola ali vidika kulture delovnega okolja [8].

Posamezniki se srečujejo predvsem s tremi vrstami izkušenj pri usklajevanju dela in družine. Prva je konflikt med delovnim in družinskim življenjem - to je konflikt med delom in drugimi življenjskimi vlogami, ki je posledica nekompatibilnosti oziroma neusklajenosti zahtev obeh področij [9]; druga izkušnja je zadovoljstvo z usklajenostjo delovnega in družinskega življenja – to je celotna ocena posameznikovih izkušenj s področja dela in ostalih življenjskih vlog [10]-[11] in tretja je obogatitev delovnega in družinskega življenja – to pa pomeni, v kolikšni meri doživljanje v eni vlogi izboljša kakovost življenja v drugi vlogi [12].

Na uspešnost usklajevanja dela in družine vplivajo številni dejavniki, tako na ravni posameznika, kot na ravni organizacije in države, kar bo opisano v nadaljevanju.

3. DEJAVNIKI NA RAVNI POSAMEZNIKA

Pomemben dejavnik na ravni posameznika je spol [13], saj so kljub trendu po spolni enakosti še vedno v večini ženske tiste, ki v večji meri prevzemajo skrb za otroke in družinska opravila. Raziskava izvedena v Sloveniji je na primer pokazala asimetrično delitev dela v družini med spoloma [14]. Moški, zaposleni s polnim delovnim časom, tako skrbi za gospodinjstvo in

pomoč drugim gospodinjstvom namenjajo v povprečju 14,5 ur tedensko, zaposlene ženske pa se s temi aktivnostmi ukvarjajo povprečno 25 ur tedensko.

Moški običajno v službi delajo dlje [15], včasih tudi ne glede na zahteve po dolgem urniku in pomembnosti njihove vloge v delovnem in zasebnem življenju. Delovni čas žensk pa je po drugi strani povezan z njihovo delovno in družinsko vlogo in ženska poskuša svoj čas razporejati glede na zahteve dela in družine [16]. Danes se tako zaposlene ženske soočajo z ogromnim pritiskom, da razvijajo kariero tako hitro in močno kot moški sodelavci, vendar pa se hkrati od njih tudi pričakuje, da aktivno sodelujejo tudi v zasebnem življenju [17]. Zato je usklajevanje delovnega in družinskega življenja še toliko bolj pomembno za ženske; saj se zaposlene poročene ženske v veliki meri soočajo s problemom usklajevanja dela in družine [17] ter pripisujejo usklajenosti delovnega in družinskega življenja močno povezavo s kakovostjo življenja.

Mednarodna primerjalna raziskava [18], ki je vključevala 27 držav in raziskava [19] izvedena v 31 evropskih državah (EU ter Hrvaška, Turčija, Norveška in Švice) sta pokazali, da se ženske v skoraj vseh državah soočajo z večjim konfliktom med delom in družino.

Trenutna splošna praksa, ko sta oba starša vključena tako v proces dela kot v starševske obveznosti, prinaša številne težave pri usklajevanju dela in družine, ki vključujejo med drugim organiziranje otroškega varstva, odsotnost zaradi porodniškega dopusta, skrb za bolne otroke in podobno [20]. Razmere na trgu dela vplivajo tudi na socialni položaj otrok. Pari, kjer sta oba zaposlena, se tako soočajo z vedno novimi izzivi, ki jih prinaša poklicno življenje kar vpliva tako na delo kot družino. Njihova starševska vloga se zaradi pritiskov organizacije pogosto preusmeri k delovnim zahtevam, kar posledično pomeni, da imajo premalo časa za aktivno preživljanje časa z otroki, še posebej z majhnimi, ki starše bolj potrebujejo, kar pogosto vodi v stres. Druga možnost pa je, da zaradi potreb otrok svojo kariero, predvsem ženske, potisnejo za določeno obdobje v ozadje [21].

Med poročenimi zaposlenimi ženskami [17], ki se v veliki meri soočajo s težavo usklajevanja dela in družine je veliko odvisno tudi od števila otrok, ki jih imajo. Ženske brez otrok so namreč bolj usklajene med delovnim in zasebnim življenjem kot tiste z otroki. To pomeni, da odgovornosti, ki jih imajo kot mame do svojih otrok definitivno vplivajo na njihovo ravnovesje med poklicnim in zasebnim življenjem.

Vpliv na konflikt med delom in družino pa ima poleg števila otrok tudi starost otrok. Največji konflikt in težave povezane imajo s tem starši, ki imajo otroke mlajše od dveh leta, tesno za njimi so tisti z otroki starimi med dve in pet, s tem ko so tisti z otroki starejšimi od 11 let pričalo o manjših težavah povezanih s časom, ki ga lahko posvetijo otrokom [21]. Tisti z otroki mlajšimi od dveh let predvsem pogrešajo kakovosten čas z otroki, ki ga nimajo zaradi velikega delovnega pritiska in stresa na delovnem mestu. Konflikt dela in družine ter stres, ki ga ob tem občutijo starši, vpliva tudi na otroke, o čemer pričajo številne raziskave [22].

4. DEJAVNIKI NA RAVNI ORGANIZACIJE

Številne raziskave izpostavljajo pomembnost podpore in spodbude delovnega okolja pri usklajevanju dela in družine [23] [16]. Organizacije lahko pripomorejo posamezniku usklajevati delo in družino z družini prijaznimi programi, ki pomagajo zaposlenemu usklajevati delo in družino oziroma obveznosti delovnega in družinskega življenja [24].

Število programov za usklajevanje dela in družine, ki jih organizacija ponudi pomembno vpliva na rezultate teh programov [25]. Več kot je na razpolago politik in praks za usklajevanje dela in družine, boljši bodo rezultati. Vsekakor pa je pomembno izpostaviti, da podjetja seveda morajo izvajajo zadostno število ukrepov, pomembno pa je tudi da so le-ti prilagojeni podjetju in potrebam njegovih zaposlenih [26].

Politik in praks za usklajevanje dela in družine je več. Najbolj pogoste so fleksibilni urnik, izkoriščanje nadur, skrajšan delovni čas, »stisnjen« delovni teden, fleksibilni čas prihoda na delo, delo od doma, dopusti, ipd. [27]. Pri preučevanju organizacijskih politik in praks za usklajevanje dela in družine je bil izpostavljen tudi pomen organizacijske kulture (skupnih predpostavk, prepričanj in vrednot glede obsega, do katerega organizacija podpira in vrednosti integracijo delovnega in družinskega življenja posameznika) [28].

5. DEJAVNIKI NA RAVNI DRŽAVE

Poleg vloge posameznika in delovne organizacija pa raziskave [18] [19] [29] kažejo, da na usklajevanje dela in družine pomembno vpliva tudi država. Država s svojimi politikami in ukrepi ustvarja bolj ali manj ugodne pogoje za usklajevanje delovnega in družinskega življenja. Glavne pobude države so usmerjene predvsem na področje skrbi za otroke, dopustom, ki omogočajo skrb za odvisne družinske člane, prožnim oblikam dela in zagotavljanje enakih možnosti za ženske in moške. Lahko pa država s svojimi ukrepi tudi zavira podjetja, da sprejemajo družini prijazne ukrepe.

Vlogo socialnih ukrepov na ravni države pri zmanjševanju konflikta med delom in družino so ugotavljali v 27 državah med katerimi je bila tudi Slovenija [18]. Na makro nivoju se je kot pomemben dejavnik, ki vpliva na konflikt med delom in družino pokazala predvsem dostopnost oziroma možnost otroškega varstva in do določene mere tudi porodniški dopust in fleksibilnost dela, slednji predvsem v povezavi z možnostmi otroškega varstva.

Slovenija ima relativno dobro razvito družinsko politiko, katere cilj je omogočanje usklajevanja poklicnih in družinskih obveznosti, ki zagotavljajo enake možnosti za oba spola in horizontalno prerazdelitev dohodka v korist družin z otroki [30]. Družinska politika se tudi v Sloveniji nanaša predvsem na starševski dopust in otroško varstvo, kot dva najpomembnejša področja v povezavi z usklajevanjem delovnega in družinskega življenja.

6. USKLAJEVANJE DELA IN DRUŽINE TER KAKOVOST ŽIVLJENJA

Vloge posameznika se tako po eni strani pogosto izključujejo, saj se zaradi večje vpletenosti v eno področje ali vlogo lahko zmanjša pozornost na drugih področjih, prav tako pa, če posameznik nameni več časa enemu področju, ga ostane manj za drugega [15] [19]. Po drugi strani pa se vloge povezujejo in so medsebojno odvisne. Posamezniki, ki so bolj zadovoljni z delom so tudi bolj zadovoljni z življenjem [31], zadovoljstvo z delom pa je še vedno eden najmočnejših prediktorjev kakovosti življenja [32].

Konflikt med delom in družino ima lahko negativne posledice za posameznika in njegovo počutje in zdravje. Konflikt med delom in družino je danes eden glavnih virov stresa s katerim se soočajo zaposleni [33]-[34], povezan je z izgorelostjo posameznikov ter večjo anksioznostjo in depresijo. Konflikt med delom in družino vpliva na odnos med delom in družino, ter številne z delom in družino povezane rezultate (na primer zadovoljstvo pri delu in življenju), kar tudi posledično lahko vpliva tudi na splošno zdravje in počutje [35]. Dobro zdravje je namreč

pomembno tudi za kakovost življenja, vsaj tako je pokazala raziskava v EU-27, v kateri je kar 81 % oseb ocenilo, da je dobro zdravje zelo pomembno za kakovost življenja [36].

7. ZAKLJUČEK

Različni pogledi na usklajevanje dela in družine kažejo, da ima ta fenomen vsaj tri vidike [37]. Prvič, usklajevanje dela in družine naj ne bi bil enodimenzionalni konstrukt, ampak konglomeracija oziroma skupek več merljivih konstruktov. Drugič, zdi se, da usklajevanje dela in družine izhaja tudi iz lastnih dejanj in vedenja posameznikov. Ter tretjič, dosežena usklajenost med delom in družino oziroma vlog "izven dela" pričakovano vodi do zadovoljstva in dobrega počutja v življenju posameznika.

Kot smo spoznali na podlagi preteklih raziskav in analize literature na usklajenost dela in družine ne vpliva le en dejavnik, temveč je usklajeno delovno in družinsko življenje rezultat številnih dejavnikov na treh nivojih: posameznik, delovna organizacija in država. Posameznik se lahko še tako dobro zaveda pomena usklajenega delovnega in družinskega življenja, vendar bo to težko udeležil brez podpore delovne organizacije ali brez potrebnih državnih politik. Brez državne stimulacije delodajalcev le-ti namreč ne ali pa le redko prispevajo k ustvarjanju družini prijaznega okolja [38]. Ali obratno, država in organizacija lahko posamezniku zagotovita vse potrebne pogoje za usklajeno delovno in družinsko življenje, vendar je na posamezniku ali bo potrebo po usklajenem delovnem družinskem življenju prepoznal ali ne in ter ali bo organizacijsko in državno podporo sprejel in deloval v prid usklajenega delovnega in družinskega življenja.

Slovenija ima sicer razmeroma dobro zakonodajo, ki podpira starševstvo in usklajevanje dela in družino in jasno prepoveduje diskriminacijo na podlagi starševstva ali družinskih obveznosti. Slovenska zakonodaja opredeljuje številne ukrepe in pravice, ki so vezane neposredno na zaposlitev in prispevajo k lažjemu usklajevanju dela in družine. Vendar pa praksa kaže, da pri uresničevanju nekaterih pravic, ki se vežejo na usklajevanje dela in družine ter starševstvo še vedno nastajajo težave in da organizacije še vedno ne priznavajo dovolj pomena usklajenosti dela in družine in da se diskriminacija na podlagi starševstva ali družinskih obveznosti še vedno dogaja [39].

Ključno vprašanje za organizacije in državo bi torej moralo biti kako spodbujati izboljšanje delovanja zaposlenih v posameznih vlogah in preprečiti konflikt med delom in ostalimi življenjskimi vlogami [37]. Prakse za usklajevanje dela in družine ustvarijo t.i. »win-win« situacijo tako za zaposlene kot organizacijo, ter nenazadnje na dolgi rok tudi za državo. Zato je pomembno, da se problematiki usklajevanja dela in družine posveča na vseh treh nivojih, posameznik, organizacija in država, ter se tudi prek zadovoljstva z usklajenostjo dela in družine izboljša vsesplošno kakovost življenja zaposlenih.

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INOVACIJE, NOVE TEHNOLOGIJE I MILENIJUMSKA GENERACIJA – ISTOVREMENI RAZVOJ

INNOVATIONS, NEW TECHNOLOGIES AND MILLENNIAL GENERATION – SIMULTANEOUS DEVELOPMENT

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Sadržaj: *Inovacije predstavljaju jedan od osnovnih elemenata u razvoju svake privrede. Podsticanjem inovacija stvaraju se preduslovi za konkurentnost na globalnom nivou. Inovacije su po svojoj prirodi višeznačne i njihovim izučavanjem stiču se znanja neophodna u gotovo svakom privrednom procesu. U vremenu čiji smo savremenici, milenijumska generacija polako ali sigurno zauzima vodeće pozicije u društvu i utemeljuje bazu resursa za dalji razvoj društva, način i stil života ali i odnos prema proizvodnji, inovacijama i tehnološkim rešenjima. Ovaj rad ima za cilj da prikaže pravac razvoja novih tehnologija i primenu inovacija u okviru tržišne privrede, sa akcentom na njihovo prihvatanje od strane budućeg nosioca društva – milenijumske generacije.*

Ključne reči: *Inovacije, Nove tehnologije, Milenijumska generacija, Konkurentnost,*

Abstract: *Innovations represent one of the core elements for development of every economy. By encouraging innovations conditions for global competitiveness are being made. Innovations are by their nature complex and through studying them researchers can collect necessary knowledge for many economic processes. In the time we live in, millennial generation is taking leading positions in the society, step by step, and is founding core of resources for further development, lifestyle, and relation toward production, innovations and technical solutions. In this paper the direction of new technologies development will be shown, as well as usage of innovations in market economy. The emphasis will be put on the acceptance of innovative solutions and new technologies by millennials.*

Keywords: *Innovations, New technologies, Millennial generation, Competitiveness*

1. UVOD

Savremeno privredno okruženje od svakog preduzeća zahteva da se brzo prilagođava potrebama potrošača i tržišnim uslovima kako bi se ostvarila konkurentska prednost, isporučila superiorna vrednost potrošačima i stekla njihova lojalnost. Jedan od osnovnih stubova razvoja i napretka preduzeća koja posluju u današnjem okruženju jeste privrženost inovativnim rešenjima i razvoju proizvoda i usluga koji ispunjavaju uslove za kvalitetniji i sadržajniji život potrošača. Osim inovativnih rešenja u razvoju samih proizvoda i usluga, u

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okviru današnjeg poslovnog okruženja neophodno je da se principi inovativnosti ugrade u sve procese u proizvodnji, ali i u upravljanju.

Generacija koja u sve većem obimu ulazi na tržište rada i polako ali sigurno počinje da zauzima značajne pozicije u društvu je milenijumska generacija, koja je poznata i pod nazivima Y generacija, "ja" generacija, digitalna generacija, net generacija, e-generacija, Petar Pan generacija. Osim mogućnosti donošenja odluka, milenijumska generacija ima sve veći uticaj na uvođenje drugačijih stilova života, načina na koji zadovoljavaju svoje potrebe kao potrošači, ali i na prihvatanje ili odbacivanje novih tehnologija. Ova generacija je od vrtića do fakulteta „prva generacija koja je odrasla uz nove tehnologije“ [1]. Ceo svoj život okružena je tehnologijom i koristi računare, Internet, video igrice, digitalnu audio tehniku, video kamere, pametne mobilne telefone i sve druge alate digitalnog doba. Prosečan student u savremeno doba je proveo manje od 5.000 sati čitajući, ali više od 10.000 sati igrajući video igrice i više od 20.000 sati gledajući televiziju [1]. Milenijumska generacija ima suštinski drugačije poimanje okruženja i tehnološkog razvoja u odnosu na generacije koje su im prethodile. Ova generacija je veoma brojna: samo u SAD živi 80 miliona, a na globalnom nivou oko 2,5 milijarde pripadnika ove generacije. Prema procenama demografa, do 2020. godine, 50% od ukupnog broja zaposlenih biće iz Milenijumske generacije, a do 2030. godine čak oko 75% [1].

Pre više od osam decenija, Jozef Šumpeter je istakao da su inovacije ključni pokretač ekonomskog rasta. Teorija i praksa su potvrdile da dugoročna konkurentnost preduzeća leži u njihovim sposobnostima da inoviraju. Proces inoviranja se odnosi na uvođenje novih ili izmenjenih proizvoda i/ili usluga, procesa, marketing metoda, organizacionih metoda, organizacije rada [2]. U ovom radu biće predstavljen pravac razvoja novih tehnologija i inovacija u okvirima savremenog privrednog okruženja. S obzirom na narastajuću ulogu milenijumske generacije na tržištu rada, ali i ulogu koju će imati kao potrošači, naglasak će biti stavljen na odnos milenijumske generacije prema novim tehnologijama, kao i prema njihovom prihvatanju na tržištu.

2. INOVACIJE – ULOGA I ZNAČAJ

Tehnologija je faktor koji menja i redefiniše sve definicije u menadžmentu i biznisu, na svim nivoima, od nivoa pojedinca, preko nivoa organizacija, do nivoa države i društava. Jednom rečju, savremena tehnologija je promenila sve nas [3], [2]. Tehničko-tehnološki progres menja način na koji pojedinci žive i rade, ali i način na koji mnogi privredni subjekti funkcionišu. Konkurentska prednost je došla u prvi plan kao osnov uspešnosti preduzeća. Upravo je konkurencija ta koja određuje uspešnost preduzetih aktivnosti preduzeća koje doprinose krajnjem rezultatu, a ogledaju se u kvalitetu, adekvatnoj primeni marketing alata, organizacionoj kulturi, inovacijama i drugim elementima. Prema Porteru, konkurentska prednost suštinski proizilazi iz vrednosti koju je preduzeće u stanju da stvori za svoje potrošače [4]. Stoga, vrednost predstavlja ono za šta su kupci spremni da izdvoje svoja raspoloživa novčana sredstva. Jedan od načina na koji se sa uspehom može graditi konkurentska prednost zasnovana na diferencijaciji jeste konstantna privrženost preduzeća inovacijama. U najvećem broju slučajeva inovacije se posmatraju kroz prizmu novih tehničko-tehnoloških rešenja i unapređenja funkcionalnosti plasiranih proizvoda. Međutim, prema Drakeru, inovacije ne moraju da budu tehničke prirode, a zapravo ne moraju da budu ni fizički opipljive [5]. Inovacije mogu da obuhvataju različita unapređenja u procesima upravljanja, donošenja odluka, proizvodnim aktivnostima i primeni postojećih, raspoloživih znanja i alata. Draker (1985), u tom kontekstu takođe navodi, da je menadžment, odnosno „korisno znanje“ koje je omogućilo

da se organizuju produktivni ljudi različitih veština i znanja u proizvodnu organizaciju, inovacija 20. veka (str. 31).

Inovacije, same po sebi, predstavljaju plod organizovane i svrshodne potrage za promenama [5]. Takve promene i adekvatna analiza šansi koje se tom prilikom javljaju, osnova su za dolaženje do uspešne inovacije. Inovativnost i inovacije predstavljaju rezultat organizovanog, sistematičnog i racionalnog rada. Inoviranjem se dolazi do racionalizacije procesa obavljanja određenih delatnosti. Takođe inovacije proizvoda omogućavaju zadovoljenje do tada nezadovoljenih ili delimično zadovoljenih potreba potrošača. Pronalazak, odnosno otkriće, je prvo saznanje o nečemu, što je po sebi postojalo i ranije ali još uvek nije bilo poznato ili objašnjeno. Može da nastane kao rezultat spontanog, inventivnog i individualnog stvaralaštva, pri čemu ne treba smetnuti sa uma da je proces dolaženja do pronalaska moguće organizovano voditi, na profesionalan način, o čemu danas svedoče mnogobrojne istraživačke institucije širom sveta, koje stvaraju patente po zahtevu korisnika.

Ključni momenat koji doprinosi uspešnosti inovacija na tržištu jeste sposobnost i prilagodljivost marketing alata za plasman proizvoda i pružanje uvećane vrednosti potrošačima. Pri uvođenju novog proizvoda - inovacije, u tržišnu utakmicu, postoje tri moguća stepena noviteta. Potpuno novi proizvod, odnosno inovacija, koja ranije nije postojala na tržištu. Mogući primeri takvih inovacija su pojava telegrafa ili pisaće mašine na tržištu. Drugi stepen inovacija je poboljšanje i unapređenje tehničkih karakteristika postojećih proizvoda. Treći stepen noviteta obuhvata prilagođavanja postojećih proizvoda potrebama ciljnog segmenta potrošača, kako bi se na efikasniji način izašlo u susret potrebama i zadovoljile želje potrošača [6]. Kroz inovacije je važno dostići željenu i percipiranu vrednost ciljnog segmenta potrošača i na taj način izvršiti diferencijaciju u odnosu na konkurente. Biti „sve za svakoga“, kako navodi Porter (1998), recept je za stratešku osrednjost i ispodprosečne rezultate, zato što to često podrazumeva da preduzeće nema nikakvu konkurentsku prednost.

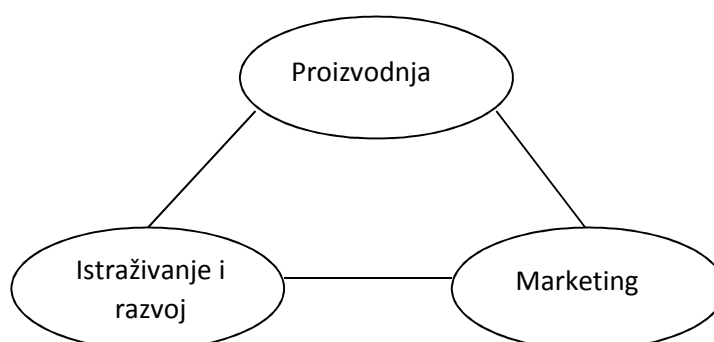
U nastojanju da se kroz inovacije ostvari što veći nivo profita, vlasnici kapitala, odnosno preduzeća na tržištu često dovode do ugrožavanja zdravlja ljudi i njihovog životnog okruženja. Zbog toga je neophodno da preduzeća uvođenjem inovacija ustanove principe i strategije društveno odgovornog poslovanja. Takav vid nastupa na tržištu podrazumeva da se u procesu proizvodnje vodi računa o bezbednosti i zdravlju na radu, o doprinosu kvalitetu života ljudi koji koriste inovirane proizvode, kao i da se pruži pomoć najbližem okruženju preduzeća - zajednici. Ovakvo ponašanje preduzeća poželjno je ne samo sa stanovišta etike, morala i dobre poslovne prakse, već i sa čisto tržišnog stanovišta. Takvim poslovanjem stiče se poverenje i lojalnost kupaca i doprinosi prisutnosti brenda proizvoda i samog preduzeća u svesti potrošača što su sve poželjni aspekti marketing strategije.

Etimološki, termin „inovacija“ vodi poreklo od latinske reči *innovatio*, što znači nov izum koji unapređuje proizvod ili metod rada. Najvažniji faktori privrednog rasta zasnovani su na inovacijama. Ti faktori su proizvod, nove proizvodne tehnologije, otvaranje novih tržišta, uvođenje novih resursa i nova organizacija ekonomskih aktivnosti [7]. U tom kontekstu se može posmatrati i definicija koju je dao Pol Trot (Paul Trott) „inovacija je proces pretvaranja ideje u praktičnu primenu-realizaciju“ [7]. Kristofer Frimen (Christopher Freeman), definiše inovacije u odnosu na aktivnosti i procese, ističući da inovacija obuhvata tehnički dizajn, proizvodnju, menadžment i komercijalne aktivnosti koje su uključene u marketing novog proizvoda, odnosno unapređenog procesa ili opreme [7]. Osnovna uloga svake inovacije jeste da stalno kreira izmene u procesima rada i proizvodima, kako bi se na optimalan način zadovoljile potrebe ljudi, olakšao rad, uvećao životni standard. Na trend rasta potreba potrošača za

inovacijama utiču konstantan rast znanja, obrazovanja, nivoa kulturne svesti pojedinaca, kupovne moći i informisanosti potrošača. Kako navodi Zelenović (2011), „princip inovativnosti uz princip stalnog unapređenja procesa rada, predstavlja osnovu obezbeđenja efektivnosti i trajanja preduzeća na virtuelnom tržištu u vremenu i datim uslovima okoline“ (str. 258). Pri tome, autor dalje navodi da princip stalnog unapređenja procesa rada uslovljava kontinualan napor na unapređenju postupaka za razvoj kvaliteta, organizaciono-upravljačke strukture preduzeća, sniženje troškova i rast produktivnosti. Princip inovativnosti, sa druge strane, određuje proces razvoja ljudskih resursa u smislu razvoja sposobnosti za pretvaranje ideja u rešenja koja optimalno ispunjavaju postojeće potrebe i želje potrošača, ali i dovode do kreiranja novih [8]. Sve što stvara promene u nastojanju da se kreira vrednost od već postojećih resursa čini sastavni deo inovacija. Da bi nastala inovacija, neophodno je organizovati sistematičan i posvećen rad na novom rešenju, jer je mali broj inovacija nastao kao rezultat genijalne ideje njenih autora, isključivo na osnovu misaonog procesa. Takav stav potvrđuje i Zelenović (2011), navodeći da iskustva pokazuju da se efektuiranje, odnosno prevođenje u ozbiljan tržišni program određene inovacije, dešava u odnosu 1:1000 slučajeva (str. 259). Sličan odnos pojavljuje se u svim oblastima rada.

Za uspeh inovacija presudna je spremnost preduzeća na kanibalizaciju sopstvenih, postojećih tehnologija i procesa [9]. Kanibalizacijom postojećih tehnologija i procesa otvara se mogućnost za uvođenje radikalne promene, a time i kreiranje inovativnog rešenja. Prema Vlašiću, postoje dva pristupa za razvoj procesa inovacija. Prvi je linearni model, a drugi je model lanca. Linearni model podrazumeva da inovacije započinju sa osnovnom idejom unapređenja određene tehnologije. Zatim se sprovode različite analize i istraživanja da bi se nakon toga pristupilo razvoju samog inovativnog rešenja. Ovaj model predstavlja guranje inovacije potrošačima, takozvani „push“ model. Drugi model, model lanca, postavlja tržište u centar pažnje. Inovacije započinju na tržištu u potrazi za potrebama potrošača, nakon čega se pristupa razvoju koncepta inovacije i njenom testiranju. Ovaj model koristi takozvani „demand pull“ pristup inovacijama [9]. Ključne funkcije u preduzeću značajne za procese i inovacione aktivnosti su proizvodnja, istraživanje i razvoj, marketing [7]. Slika 1. predstavlja prikaz odnosa između navedenih funkcija u preduzeću.

Slika 1: Ključne funkcije u preduzeću za razvoj inovacionih aktivnosti



Izvor: Lajović i sar., 2010.

3. MILENIJUMSKA GENERACIJA I ODNOS PREMA TEHNOLOŠKIM INOVACIJAMA

Milenijalci predstavljaju generaciju koja je odrastala sa tehnologijom i imala pristup tehnologiji tokom svog školovanja i karijere. Pojava i primena društvenih mreža kao što su Facebook, LinkedIn, Instagram i Twitter su u još većoj meri povezali milenijalce i uticali na način na koji komuniciraju [10]. Nove tehnologije, kao što su 3D štampači, Big Data, veštačka inteligencija, Blockchain tehnologije takođe utiču na ponašanje milenijalaca, na način na koji žive, rade, donose odluke.

Da bi se osigurao napredak, svetu su neophodni mladi ljudi, koji su visoko kvalifikovani i zainteresovani za nauku i koji nameravaju da svoju karijeru ostvare upravo u toj oblasti. U tom cilju, kreativnost pojedinaca predstavlja neophodan element u obrazovanju na svim obrazovnim nivoima. Kreativnost se može definisati kao sposobnost kreiranja originalnih ideja ili čak novih proizvoda. Takođe kreativnost uključuje i kombinovanje postojećih ideja i rada, na različite do tada neostvarene načine, kako bi se ispunila njihova nova zamišljena svrha [11]. U odnosu na kreativnost često se postavljaju određene barijere. One moraju da budu prevaziđene kako bi se dostigao viši nivo razmišljanja i rešavanja realnih problema iz svakodnevnog života [11]. Ove prepreke mogu da budu emocionalne i kulturološke prirode, mogu da potiču od vrste i nivoa znanja, percepcije ili iz određenih psihografskih osobina ljudi. Kreativne ljude uglavnom karakterišu određene osobine ličnosti koje su specifične za njih. To su obično energične osobe, pune novih ideja, željne napredovanja i izazova. Oni su takođe otvoreni za nova iskustva, spontani, ali veoma uporni i vredni radnici koji su u potpunosti fokusirani na realizaciju postavljenih ciljeva [11].

Definisanje generacijskih grupa razlikuje se od autora do autora. Generacija predstavlja grupu ljudi sličnih godina starosti, koji dele identične godine iskustvenog sazrevanja i obrazovanja, te stoga poseduju jedinstvene vrednosti i stavove koji ih čine drugačijim u odnosu na ostale generacije [12]. Iako nije precizno definisano, većina autora se slaže da milenijumsku generaciju čine osobe rođene između 1980. i 2000. godine [13], [14]. Svako uopštavanje i pripisivanje jedinstvenih karakteristika ličnosti svim članovima iste grupe nesumnjivo vodi do iskrivljene slike o pojedincima koji pripadaju određenoj grupaciji. Ipak, uopštavanja poput generacijskog grupisanja imaju svoje opravdanje u praksi, jer pomažu da se sagledaju elementi okruženja u kojima se članovi grupe pojedinačno formiraju i uticaj tih elemenata na buduće ponašanje pojedinaca.

Neke od najčešće navođenih osobina milenijumske generacije u literaturi su: 1) Članovi ove generacije su posebni i u prvom planu po značaju za svoje roditelje, naciju i svet; 2) O njima se oduvek vodilo računa, postali su predmet pažnje najšireg pokreta za zaštitu mladih u američkoj istoriji; 3) Oni su puni samopouzdanja i optimizma, ponosni na snagu i potencijal svoje generacije; 4) Oni su timski orijentisani, jer su odrastali uz kolektivne sportove i grupno obrazovanje; 5) Oni dostižu rezultate koji su postavljeni pred njih nacionalnim standardima u obrazovanju; 6) Osećaju da su pod pritiskom i nastoje da budu izvrsni u onome što rade; 7) Naklonjeniji su konvencionalnim stavovima u odnosu na radikalne, jer smatraju da društveno uređenje postoji kako bi pomoglo ljudima [13]. Dodatne pozitivne karakteristike koje se pripisuju milenijalcima su otvorenost, sloboda u izražavanju ideja i mišljenja, liberalnost, spremnost ka prihvatanju novih ideja i znanja [15]. Jedna od značajnih karakteristika milenijalaca jeste da brzo prihvataju savremene tehnologije i alate jer su navikli da pomoću njih posao obavljaju bolje i efikasnije [16]. Članovi milenijumske generacije koji imaju između 18 i 38 godina prema svojim osobinama i ponašanjem značajno utiču na oblikovanje sveta u kome

živimo. Njihov uticaj je primetan u načinu na koji se organizuje posao, slobodno vreme, društveni odnosi kao i međusobno umrežavanje u čijem okviru se navedene promene dešavaju. Ova generacija je promenila način komuniciranja, preoblikovala je tradicionalne poslovne modele i redefinisala značenje pojma društvenosti u realnom, ali i online životu [17].

Postoji i druga strana medalje. Milenijumsku generaciju neretko opisuju i kao sebičnu, zaljublenu u sebe, povezanu emocionalno i fizički sa osobama u svojim društvenim krugovima ali odvojenu od institucionalnih struktura i kulturnog uređenja [17]. Takođe, negativne osobine koje se pripisuju milenijalcima su i lenjost, česta promena poslodavaca, težnja za dužim odmorom na radnom mestu i fleksibilnim radnim vremenom, nespремnost da se pomogne drugima i pruži širi doprinos zajednici, fokusiranost na materijalne vrednosti i lični uspeh [15]. Navodeći samo neke od osobina milenijalaca Berger [18] ističe da 85% milenijalaca poseduje pametan mobilni telefon, a da u toku dana milenijalci dodirnu pametni telefon čak 43 puta. Pri tome 75% milenijalaca ima profil na nekoj od društvenih mreža, 65% milenijalaca prati vesti na televiziji, a 59% njih do vesti dolazi putem Interneta. Kao što zahtevaju poseban pristup u svakodnevnim aktivnostima, članovi milenijumske generacije su stvorili neophodnost da se i obrazovanje koje dobijaju prilagodi na specifičan način.

Više od polovine članova milenijumske generacije u SAD je na testovima pokazalo nizak nivo funkcionalne pismenosti iz oblasti lingvistike, dok je preko dve trećine pokazalo nedovoljne rezultate za funkcionalnu pismenost u numeričkim veštinama [19]. Ovaj podatak govori da relativno veliki broj mladih nije u stanju da identifikuje, interpretira ili vrednuje celu informaciju ili neki njen deo ili da reši numerički zadatak koji zahteva strategiju izbora metoda za njegovo rešavanje i višestepeni postupak. Članovi milenijumske generacije u velikom broju odlaze na fakultete ali ih upisuju sa niskim nivoom znanja na čijim osnovama treba da grade svoje obrazovanje i stvore uspešnu karijeru tokom svog života.

Faza prelaska iz perioda obrazovanja u radno aktivno doba ima značajne implikacije za formiranje uverenja i aktivnosti u vezi sa budućom karijerom. Prema autorima Wendlandt-u i Rochlen-u, ovaj period se odvija kroz tri faze: anticipaciju (prikupljanje informacija i procena koje dovode do formiranja stavova), prilagođavanje (gde pojedinac ulazi u kompaniju i radno okruženje) i postignuće (gde se raspoznaje pozicija pojedinca u okviru organizacije i u kojoj on donosi odluku o ostanku u kompaniji) [14]. Iako je milenijumska generacija ulazila u svoje radno okruženje u periodima izbijanja ekonomskih slomova i kriza, tehnologija im je pomogla da period prilagođavanja na radno okruženje prebrode uz manje poteškoće. U poređenju sa ostalim generacijama koje se istovremeno nalaze u radnom okruženju, milenijalci pokazuju visok stepen obrazovanja, privrženost tehnologiji i visoku mobilnost [20].

I pored stavova da milenijumska generacija želi potpuno drugačiji radni ambijent kao i da nemaju istu motivaciju prema poslu kao njihovi prethodnici, rezultati jedne studije pokazuju da su im stavovi identični sa starijim generacijama. Oni žele da budu dobro plaćeni za svoj posao, da rade u okruženju koje im pruža podršku i da imaju balans sa privatnim životom [20]. Jedina razlika koja se pojavila u odnosu između generacija je ta što milenijalci poštuju autoritet na poslu, ali ga isto tako preispituju u smislu produktivnosti rada i načina na koji se određeni posao obavlja. Kada opisuju svoje idealno radno mesto, milenijalci koriste sledeće termine: „family friendly“, „culture friendly“, „fun“, „campus feel“, „company events“, „making a social difference“, „listening leadership“ [17]. Milenijalci se opiru formalnim instrukcijama, planiraju aktivnosti koje se u velikoj meri oslanjaju na metod pokušaja i greške, većinu znanja koju usvajaju trude se da usvoje od svojih vršnjaka, cene rad u malim grupama i na teme koje su istog trenutka primenljive u praksi, žele da prihvate rizik ali u bezbednom okruženju, interesuju

se isključivo za teme za koje smatraju da pružaju određenu vrednost [21]. Neprilagođenost ovim osobinama, ali i mnoge druge okolnosti u kojima su odrastali članovi milenijumske generacije, doveli su do pada njihovog interesovanja za obrazovanjem u oblasti inženjerstva i nauke, što predstavlja problem za budući razvoj inovacija i celokupan napredak društva.

Kako bi privukli i zadržali milenijumsku generaciju u okviru radne snage, poslodavci moraju da prilagode radno okruženje i način poslovanja na specifične načine. Neke od preporuka poslodavcima u tom pravcu koje se mogu pronaći u literaturi su: Milenijalcima je potrebna povratna informacija – poželjno je prepoznati zalaganje i odati im priznanje; Milenijalci imaju realna očekivanja po pitanju početne zarade i početnog posla, ali očekuju brz napredak i razvoj novih veština kroz posao; Oni žele balans između posla i privatnog života; ukoliko su svi uslovi optimalni, milenijalci očekuju od kompanije u kojoj rade da bude društveno odgovorna [13].

4. ZAKLJUČAK

Milenijalci predstavljaju generaciju koja u svakom preduzeću rado prihvata primenu novih, savremenih tehnologija i nastoji da pomoću njih kreira inovativne proizvode i usluge. Sa svim karakteristikama koje ih krasi, milenijalci na najbolji način razumeju kako treba prilagoditi celokupno ponašanje u preduzeću koje primenjuje nove tehnologije sa krajnjim ciljem da bude inovativno. Imati inovativan proizvod i/ili uslugu u današnjem okruženju nije dovoljno. Milenijalci su shvatili da preduzeća moraju da budu inovativna i u načinu na koji pronalaze svoje kupce, uspostavljaju odnose sa njima, pružaju im usluge, prodaju im svoje proizvode, isporučuju ih i servisiraju. Da bi u tome uspeali, neophodno je da upoznaju i razumeju kupca i njegove postojeće, ali i buduće potrebe.

Milenijumska generacija je od ključne važnosti za uspeh svakog preduzeća, bez obzira na njegovu veličinu, delatnost i/ili tržište na kojem posluje. Aspiracije i stavovi milenijalaca o njihovoj karijeri, kao i želja za stalnim prihvatanjem i primenom novih tehnologija će oblikovati način na koji preduzeća inoviraju, stiču i održavaju konkurentsku prednost.

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MILLENNIALS' PERCEPTION OF AUTONOMOUS VEHICLES

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Abstract: *Examining the influence of information technology on the business value has been the main challenge for several researchers in the last few decades and it is not changing today with new technological improvements. Since one of the latest technological issues is related to the autonomous vehicles, this paper thus reviews some important challenges related to them. Nevertheless, they may present a next major shift not merely in business models' change but in the overall transformation and perception regarding transportation in general. The purpose of the paper is to examine the attitude of millennials toward autonomous vehicles and based on the attitude to consider anticipated changes in business models. Altogether, 364 individuals participated in the research. The results show that despite the fact that respondents are quite excited with the capabilities of new technologies, they are more reserved regarding the use of AV.*

Keywords: *Business models, technology, autonomous vehicles, digitalization*

1. INTRODUCTION

Organizations are nowadays facing the challenges that are driven by the new technologies, innovations or the advent of new online based companies. Contemporary technological trends, such as cloud computing, social media, internet of things, data analytics and others, yet not each separately, but rather the complexity of coordinating all these aspects together are bringing several new challenges. These new technological improvements are forcing organizations into changes and driving the digital transformation. One of the main challenges of the existing companies is how to transform their business models.

Nevertheless, examining the influence of information technology on the business value has been the main challenge for several researchers in the last few decades and it is not changing today with new technological improvements. This paper thus reviews some important challenges related to autonomous vehicles (AV) since they may present a next major shift not merely in business models' change but in the overall transformation and perception regarding the transportation in general.

One of the groups that will be highly influenced or affected by the AV technology is definitely current millennials. Therefore, the paper focuses on their perception regarding AV technology. The purpose of the paper is to examine the attitude of millennials toward AV technology and based on the attitude to consider anticipated changes in business models by different involved stakeholders.

A special questionnaire was thus prepared in order to get an overview of millennials' attitude. The questionnaire was amongst other composed of several items measuring the attitude toward

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new technologies and AV, items measuring challenges of AV, rationality and security of AV. The data collection started in May and was concluded in July 2018. Altogether, 364 individuals participated in the research.

The paper is divided into two main parts, firstly some important concepts for AV are briefly presented following by presenting the results on the millennials' perception regarding AV.

2. CONCEPTS IMPORTANT FOR AV

Since new technologies are emerging from year to year, this paper focuses on the most establishes concepts that are important for autonomous vehicles from the business perspective. Thus, internet of things, cloud computing and big data are shortly presented, since all these concepts are also interrelated. Nevertheless, the growth of big data is produced through cloud computing [11], while the latter has enabled significant development of the Internet of things.

2.1 INTERNET OF THINGS (IOT)

The internet of things denotes a concept that relies on self-directed communication of different physical objects equipped with sensors and communication technology. There are many potential employments like smart homes, smart cities, smart healthcare or industrial automation [4]. Due to many different applications of IoT, the paper focuses on two main application areas that are also closely connected to autonomous vehicles, namely smart grids and smart cities.

Smart Grids

Energy utility organizations are facing challenges comparable to market liberalization a decade ago [9]. Drivers of current changes are increasing demand for effective and efficient use of energy, increasing production from renewable energy, requirements for an efficient energy market and technological innovations such as smart grids. One of the concepts of smart grids is the advanced metering infrastructure, which provides the basic IT platform on which a variety of services for all participants in the utility market can be developed [17]. It refers not only to electricity but also to other energy products and can give providers the basic IT infrastructure for multi-utility energy supply. The latter requires changes in business models and business processes as well [7].

With the introduction of appropriate consumption management programs in the form of various utility packages, it is possible to allow consumers the possibility to lower energy bills by adjusting the consumption, to reduce investments in the network for distributors due to reduce in peak load growth trend, and to achieve better environmental results. However, the basic problem is how to adequately respond to the new challenges and adjust the business models of supply chains as well as consumer behavior in order to ensure efficient multi-utility management.

Smart cities

A city can be considered smart if it has integrated wireless communication platforms [10]. In the modern world, there are more and more large urban areas that are exploiting new technologies to integrate different aspects of life in cities by introducing a concept of smart cities. Such urban areas based on the strategy of introducing smart cities are bringing to its residents a more comfortable life, to its business entities a more favorable environment for their activities, and to the global level a vision of a cleaner environment. Basically, a smart city is defined as the city that has incorporated a digital technology in all of its functions needed for

its residents and organizations. IoT provides a platform for sensors and devices to communicate within the smart city and enables increasingly useful information sharing across platforms making it the next revolutionary utilizing the Internet technology. The implementations of IoT in smart cities refers to developing intelligent systems like smart grids, smart homes, smart transportation, smart water, smart waste management and smart energy [8].

The growth of big data and the evolution of IoT technologies have an important role in the utilization of smart city initiatives. Big data present the possibility for cities to get valuable information from a large dispersed amount of data collected through different sources, while IoT allows the integration of sensors and their communication in the real-world environment by using highly networked services [10].

2.2 CLOUD COMPUTING

One of the main challenges in the last decade is related to the cloud computing and how to use effectively use it. Allowing access from anywhere and anytime, it offers a new way for individuals and organizations to communicate and work over the internet [3]. Cloud computing is now perceived as a global trend that has gained attention from both academic and practitioner communities in the last decade. Although the development of cloud computing has not reached the maturity level, there is still a lack of research on it [1]. In the initial years, researchers focused on the definition of cloud computing and studied how it could be applied to existing solutions. Therefore, most of the articles were dealing with the conceptualization of cloud computing. Later, when the consensus on the definition was somehow achieved, the research moved to the technical dimensions of cloud computing including architectural designs. Even though cloud computing has achieved great progress in recent years; it is expected to continue its growth [15].

Cloud computing offers several benefits from the technology and functionality perspectives as well like increased flexibility, availability, and functionality [18]. Nevertheless, it offers a scalable IT system infrastructure that is enabling organizations to start or develop its businesses at lower starting costs [12]. However, there are also several important issues related to cloud computing like security, privacy, reliability, legal matters, open standard, freedom, and long-term sustainability [14]. It has been suggested that these issues should be solved before the wide deployment of cloud computing [18], which seems to be beyond the reach.

In the last years, cloud users moved from understanding what cloud computing is to rather examining how to use it [1]. However, due to the change from previous business models or on-premise computing to cloud computing, organizations and individuals have to obtain or develop new skills and knowledge.

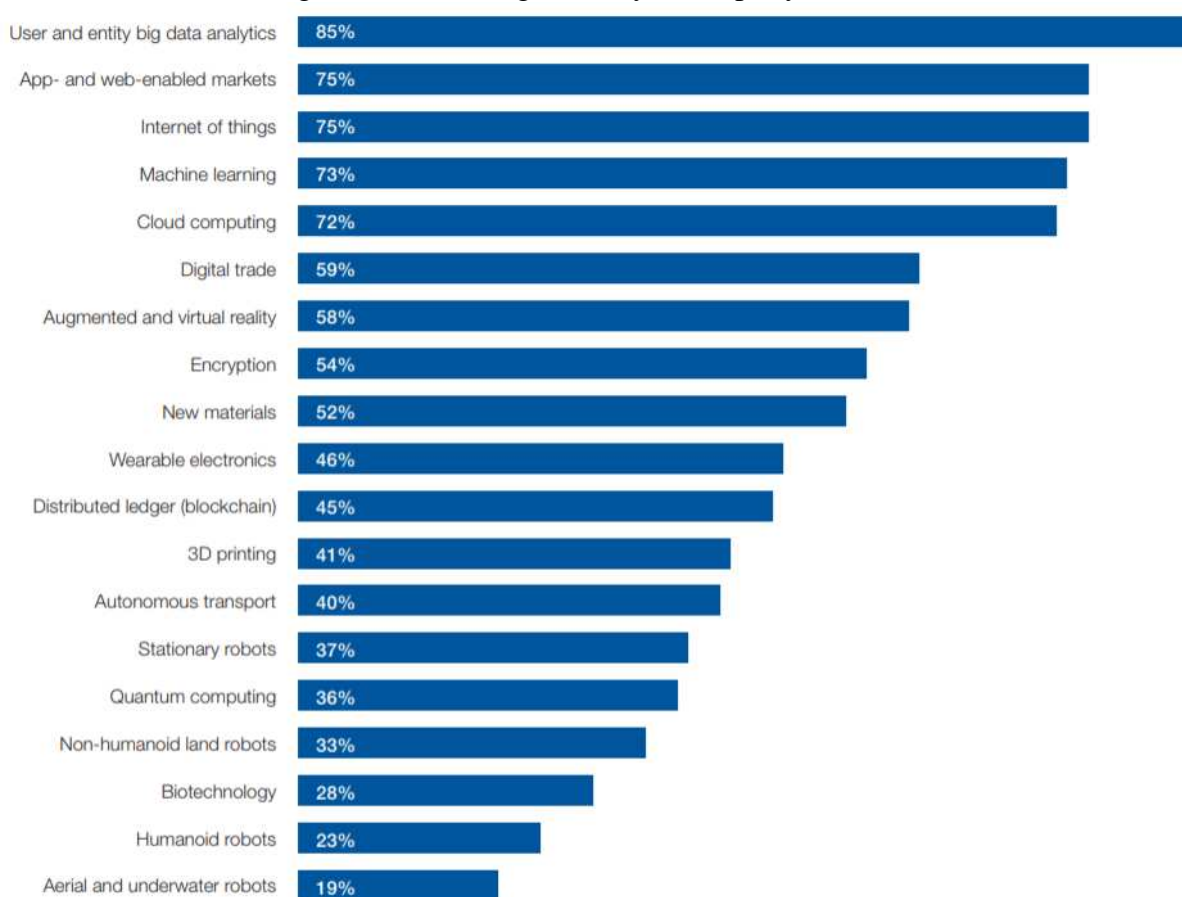
2.3 BIG DATA

Big data is a concept that originated from the need of large organizations like Yahoo, Google, and Facebook to analyze large amounts of data [6]. It presents a concept that is related to the increased volume of data that are difficult to store, process and analyze using traditional database technologies. Although the term big data is quite new in the field of information technology, several researchers and practitioners have already used it in previous literature. It was, for instance, referred to a large volume of scientific data for visualization [2]. Currently, several different definitions of big data exist. It was also defined as the amount of data that is hardly efficiently stored, managed and processed [13]. Recently, a different explanation from

3V like Volume, Variety, and Velocity to 4V like Volume, Velocity, Variety and Veracity have been offered to define big data [5], [11]. The 4V definition of big data is commonly recognized since it denotes both the meaning and necessity of big data as well.

Big data and big data analytics present enormous potential for different applications. One of the main sources for producing huge amounts of data are namely IoT, multimedia and social media. Also, cloud computing and big data analytics are related since big data analytics enables users to process queries across multiple datasets and receive results in a timely manner, while cloud computing provides the underlying data processing platforms [11]. Additionally, it has been forecasted that there will be an enormous increase in demand for big data skills in the near future. It is even expected that the increase in demand for these skills will grow by 160% in the United Kingdom alone [19].

Figure 1: Technologies likely to adopt by 2022 [16]



Thus, it is not surprisingly that these concepts are placed on the priority list of the majority of companies that were included in the Future of Job Report [16]. According to the planned investment by the companies surveyed in 2018 (Figure 1) 85% of them are likely to expand their adoption of big data analytics. Likewise, the majority of companies are expected to expand their adoption of the internet of things and making extensive use of cloud computing. Although the estimated use of autonomous transport appears to remain somewhat more limited comparing to the technologies the will be most likely adopted by 2022, the proportion of companies that are planning to adopt the technology related to autonomous transport is not to be overlooked.

3. DATA ANALYSIS AND RESULTS

The questionnaire is, among other indicators that are not relevant for this research, composed of several items measuring the attitude toward new technologies, attitude toward AV, challenges of AV, rationality and security of AV and way of spending available time in AV. If not stated otherwise, we used a structured questionnaire with five-point Likert scales.

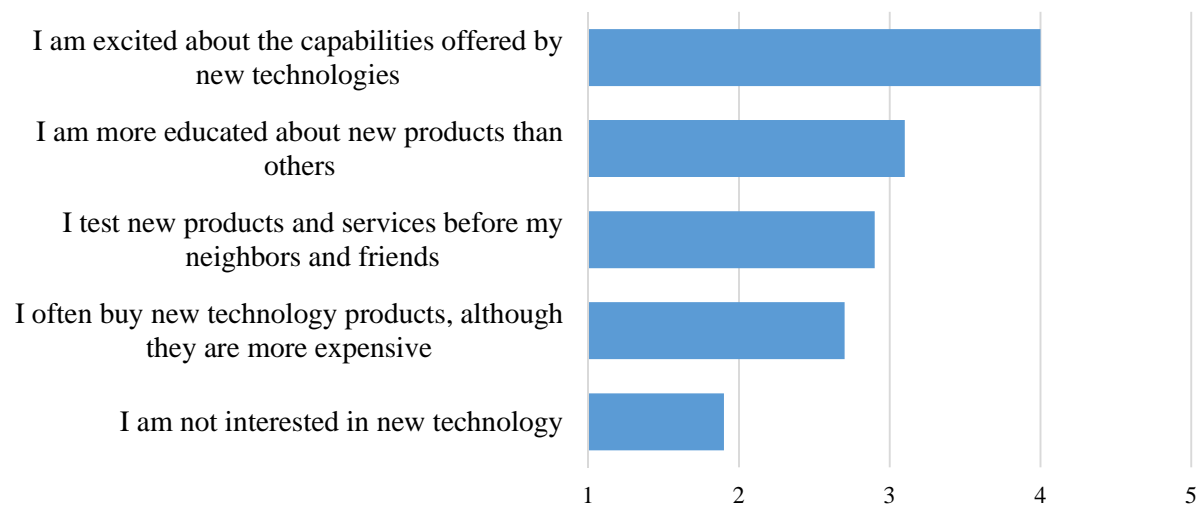
The research question was empirically tested using data from individuals aged between 20 and 30. A public web link was created and published online, and thus randomly disseminated among individuals. Altogether, 364 individuals with all the data valid for the analysis participated in the research. The respondents' profile is shown in Table 1. The data collection started in May and was concluded in July 2018.

Table 1: Profile of the respondents

| | | Percent (%) |
|------------------------------|----------------------------|-------------|
| Gender | Male | 41 |
| | Female | 59 |
| Valid driving license | No driving license | 5 |
| | Less than 3 years | 12 |
| | 3-5 years | 67 |
| | 6-8 years | 9 |
| | More than 8 years | 6 |
| Frequency of driving | I don't drive | 5 |
| | Less than once per week | 11 |
| | 1-2 times per week | 17 |
| | 3-4 times per week | 21 |
| | More than 5 times per week | 46 |

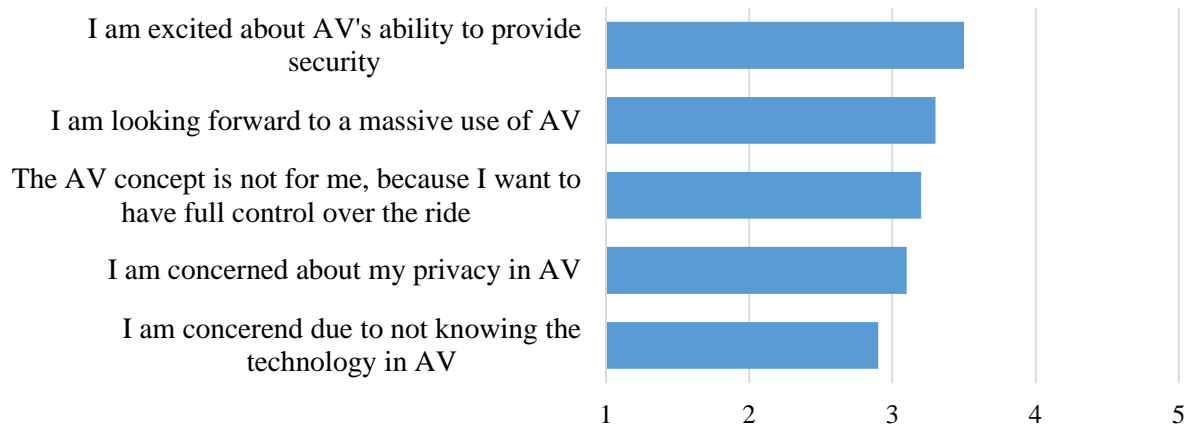
Expectedly, millennials are in majority quite excited about the capabilities that are offered by new technologies and also consider themselves as being more educated about the new products comparing to others as it is evident from the Figure 2.

Figure 2: Relation to modern technologies



While only a small proportion of the millennials is not interested in the new technology, it is not the case for AV. Despite the fact, that the majority of millennials is quite excited about the AV’s ability to provide security and are looking forward to a massive use (Figure 3); their excitement is considerably lower comparing to the technologies in general.

Figure 3: Attitude towards AV



Even though the millennials are not concerned about the privacy in AV, they exposed several issues that should be solved before mass usage of AV with regulation the legal basis on the first place, following by focusing on the cybersecurity. An important issue to consider is also related to preparing and maintaining roadmaps that are currently too slow and demanding.

Table 2: Main issues to solve before mass usage

| Issues to solve before mass usage | Average | Std. dev. |
|---|---------|-----------|
| To regulate the legal basis | 4,3 | 0,73 |
| To focus on cybersecurity | 3,9 | 0,90 |
| To prepare and maintain roadmaps | 3,5 | 0,94 |
| To deal with poor weather conditions | 3,4 | 1,06 |
| To deal with the complex processes that are currently not adequately controlled by artificial intelligence. | 3,1 | 1,01 |

In order to propose or to develop proper business models related to AV, it is crucial to know millennials’ preferences regarding spending their time during driving with AV. The majority would like to spend the time - that would be otherwise spent by focusing on driving – by listening to music. All other preferences are considerably lagging behind, yet planning different activities or making phone calls seems to be quite important as well. Taking some rest, which is also a relatively highly ranked preference, may wrongly be considered as having no influence on the business models. Yet, providing different services including improved resting or sleeping may be found as a reasonable solution for many millennials that were included in the survey. Contrary, game-related activities are not considered as a high priority preference of millennials; however, due to a very high standard deviation on this preference, there may be significant differences among some millennials which are worth to be research into greater detail.

Table 3: Spending time during driving with AV

| Preferences - time spent | Average | Std. dev. |
|--|----------------|------------------|
| Listen to music while driving | 4,3 | 0,77 |
| For planning activities | 3,9 | 0,91 |
| Making phone calls | 3,8 | 0,95 |
| Taking some rest | 3,8 | 1,03 |
| Work-related activities | 3,7 | 0,93 |
| Using for education | 3,6 | 1,01 |
| Saving time - using for lunch or snack | 3,6 | 1,11 |
| Watching movies | 3,4 | 1,12 |
| Game-related activities | 2,7 | 1,21 |

The majority of surveyed millennials believe that AV are more environmentally friendly and will make their lives easier, particularly related to parking places. Moreover, millennials are also more in favor of using AV on short distances (public transport within a city) comparing to using them on longer distances such as travel journeys etc.

Table 4: Preferences of millennials related to AV

| Preferences | Average | Std. dev. |
|---|----------------|------------------|
| AV will make my life easier, as I will not be concerned with finding a parking space. | 3,7 | 0,92 |
| AV are more environmentally friendly and thus also socially and economically beneficial | 3,7 | 0,87 |
| For public transport (within a city) I would rather drive with an autonomous bus | 3,3 | 0,99 |
| I'd prefer to sit in an autonomous taxi rather than in a taxi with a driver | 3,1 | 1,02 |
| I would rather drive with an autonomous bus on a trip | 2,9 | 0,98 |

The forecast about AV seems to be positive, at least from the perspective of predicted feelings of millennials related to AV. The majority of surveyed respondents believe in comfortable feeling, although the proportion of millennials with nervous feelings should not be neglected.

Table 5: Predicted feelings of millennials in AV

| Feelings | Average | Std. dev. |
|-----------------|----------------|------------------|
| Comfortable | 3,9 | 0,78 |
| Nervous | 3,2 | 1,00 |
| Safe | 3,1 | 0,94 |
| Scared | 2,8 | 1,01 |

4. CONCLUSION

The paper presented an overview of some of the important concepts for autonomous vehicles together with the results based on the survey on more than 300 millennials. All these new technological advancements and concepts are forcing current businesses into digital transformation and are presenting a challenge for new business models; and therefore, knowing the perception of the generation that will probably be an important consumer of these

technological advancements in the recent future is highly important. Recent future is named above with a particular purpose. From mid-2019, two autonomous buses will operate in Vienna in a pre-specified route. Thus, it is not a distant future anymore.

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CONFLICT OF RIGHTS IN WORKPLACE WITH REGARD TO THE OBSERVANCE OF INTERNATIONAL ANTI-DISCRIMINATION STANDARDS

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Abstract: *The paper explores some rights and obligations in workplace: the rights of an individual worker (employee); the rights of the other workers (employees), as well as the rights and obligations of the employer. It indicates hypotheses where, in the realization of some of his / her rights, the individual worker violates the rights of other workers of the same team, and the employer, whose right and duty is to protect them, does not have stable legal mechanisms to do so.*

Keywords: *Discrimination, harassment, rights, worker, employer, labour law*

1. INTRODUCTION

The introduction of international and European anti-discrimination standards into national law is an important part of the democratic changes in Bulgaria since the early 1990s. First of all, compliance with international instruments to which the Republic of Bulgaria is a party, even when they contradict internal law becomes a constitutionally established imperative norm - Art. 5, para. 4 of the Constitution [1]. Thus, the country has undertaken obligations arising from universal international human rights instruments, the ILO conventions on the prohibition of discrimination, as well as recommendations against racism and intolerance of the Council of Europe and the political criteria for future membership in the European Union [2]. As a result, a Protection Against Discrimination Act was adopted in 2003 [3] and anti-discrimination provisions are included in a number of special laws.

2. THE INTERNATIONAL ANTI-DISCRIMINATION NORMS IN BULGARIAN LEGISLATION

In general, the European Anti-Discrimination Directives contain a list of protected grounds which includes: sex, sexual orientation, disability, age, religion or belief, racial or ethnic origin, color or membership of a national minority, nationality or national origin, gender identity. The list of discriminatory signs under Article 14 of the European Convention on Human Rights (ECHR) is similar: sex, race, color, language, religion, political or other opinion, national or social origin, association with a national minority, property, birth or other status [4], [5]. In addition, the European Court of Human Rights (ECtHR) has also recognized the following characteristics as grounds for protection: paternity, marital status, membership of an organization, military title, parental responsibility for a child outside the country and residence. In general, the approach to justification under EU law, despite certain differences, is substantially similar to that of the ECtHR [6].

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The purpose of international and European anti-discrimination legal acts is to provide every person equality before the law, equality of treatment and opportunities for participation in public life. It is aimed at protecting and providing equal opportunities for the more vulnerable social strata who have been subject to unequal treatment over the past decades and centuries. This is also the aim of the European directives in the field of work which deal with equal pay for women and men in equal or equivalent work, the prohibition of discrimination in the exercise of the right to work, sexual harassment and harassment, based on the sex, protection of pregnant women and nursing mothers, parental leave. In order to achieve this goal - the protection of the more vulnerable social strata - they have also been transposed into the Bulgarian anti-discrimination and labor legislation. For example, within the meaning of Art. 8(3) of Bulgarian Labor Code (LC) [7], the employer undertakes not to carry out or prohibit the act of discrimination against the employees of his enterprise. The fulfillment by the employer of this obligation is also the fulfillment of the obligation to protect the dignity of the employee during the performance of the work relationship - art. 127 (2) LC. It also includes the derivative of this obligation not to commit or to allow acts of discrimination against the employees of the enterprise – art. 8 (3) LC and art. 13 et seq. of the Protection Against Discrimination Act (PADA)- and in particular to take effective measures to prevent discriminatory acts carried out at the workplace by an employee against another employee in the same company and with the same employer. The legal purpose of these provisions is not only to prevent and protect the worker from discriminatory acts committed by the employer, but also prevention and protection against such acts by other workers in the enterprise. The non-fulfillment of this labor obligation by other workers constitutes a violation of the labor discipline and is a ground for disciplinary liability - art. 186 LC, art. 17 PADA [8].

According to Art. 17 PADA, an employer who has received a complaint from an employee who is considered to be a subject of harassment, including sexual harassment, at the workplace, is obliged to immediately carry out an inspection, take measures to stop the harassment and to impose disciplinary liability if the harassment is done by another employee. Art. 5 of the same act orders that the harassment based on the signs under Art. 4 (1) (gender, race, nationality, ethnicity, human genome, citizenship, origin, religion or belief, education, convictions, political affiliation, personal or social status, disability, age, sexual orientation, marital status, property status, or on any other ground established by law or by an international treaty to which the Republic of Bulgaria is a party), sexual harassment, incitement to discrimination, persecution and racial segregation, as well as the building and maintenance of an architectural environment hampering the access to public places of people with disabilities shall be considered discrimination. It is clear from this text that the legislator identifies the terms "harassment" and "discrimination" only when harassment is based on the listed in Art. 4 discriminatory signs. From this it should be logically concluded that the Bulgarian word „мормос“, corresponding to "harassment" in principle understood as an unwanted behavior, consisting of intentional, systematic induction of physical or mental pain from a position of power, is a wider concept than the concept of "discrimination ". In this sense, no less suffering can cause unwanted behavior, manifested in systemic verbal aggression, spreading derogatory rumors, offensive qualifications, etc. in the workplace, concerning a person who does not meet any of the features listed in Article 4 (1) PADA. Consequently, the term "harassment" should not be defined as 'discrimination'.

However, the legal definition contained in § 1, item 1 of the Additional provisions of PADA, defines the term "harassment" as "any unwanted physical, verbal or other conduct on the grounds referred to in Article 4 (1), aimed at, or resulting in, a violation of a person's dignity and the creation of a hostile, offensive or intimidating environment". It follows that systematic

and deliberate unwanted conduct of an employee against another employee, which has the purpose or effect of damaging the dignity of the person, is not harassment, if it is not based on the features under Art.4 (1) PADA. Then, how could the victim of such behavior be protected, if that behavior had the purpose or effect of damaging her dignity, but was not based on discriminatory signs? On what basis could the employer achieve the perpetrator's disciplinary responsibility in order to fulfill his obligation under Art. 127(2) LC - to protect the dignity of the injured employee during the performance of the work relationship?

At the same time, the employer faces a number of legal obstacles that prevent him from imposing a disciplinary punishment. First of all, the actions of those persons systematically undermining the dignity of the other workers, cannot be classified as 'harassment' in the workplace, because they are not based on discriminatory signs. Secondly, there is no text in Bulgarian labor legislation providing for disciplinary punishment for deliberate, systemic, degrading the prestige of other workers actions that are not based on discriminatory signs, i.e. actions that do not correspond to the legal definition of "harassment". Thirdly, disciplinary punishment is imposed for violations of labor discipline, and in order for it to exist, it must first of all be proven that the employee has failed to fulfill his obligations under the employment relationship - for example, to observe working hours. If, however, the persons in question fulfill their obligations under the employment relationship, but nevertheless systematically undermine the dignity of other workers and create a threatening environment for them, the employer may find difficult to find legal grounds for disciplinary punishment.

Next, even if there is sufficient reason to believe that the aggressive conduct of the persons concerned is a violation of labor discipline, the procedure for imposing disciplinary sanctions places additional obstacles on the employer. Pursuant to Art. 194 (1) LC, the penalty must be imposed within certain time limits - two months from the opening or one year from the commission of the violation, otherwise it will not be lawful. The expiration of the time limits extinguishes the possibility of imposing a disciplinary penalty. Before imposing the punishment, the employer is obliged to collect evidence, first of all requesting an explanation from the offender - Art.193 (1) LC. With a view to protect the worker, the imposition of a disciplinary punishment is done by a motivated written order of the employer – Art.195 (1) LC. Receiving the order from the worker is a key element of the disciplinary procedure. Therefore, if it cannot be handed personally, the order is sent by post with registered letter with acknowledgment of receipt - art.195(2) LC. Failure to comply with the disciplinary proceedings leads to cancellation of the order if it is considered in court- Art. 193(2); the law also does not consider the hypothesis where, if the employee cannot be found.

The purpose of the disciplinary proceedings is to protect the worker against unjustified dismissal. It is based on the assumption that the worker is the more vulnerable party in the relationship, but gaps in legislation allow the worker to avoid disciplinary punishment. The most accessible way to do so is to go into continuous leave because of temporary incapacity to work, making unachievable the condition of Art. 194 (1) LC - the disciplinary sanctions shall be imposed not later than 2 months after the violation has been discovered and no later than one year after its commencement.

The imposition of disciplinary punishment becomes more difficult and even impossible if the respondents meet the conditions of protection under Art. 333 LC. The precondition is to give consent or refuse to authorize the dismissal by a competent state or trade union body. Even in the event of a systematic violation of the discipline, leading to disciplinary dismissal, the employer can dismiss only with prior permission of the labor inspectorate. In case of dismissal

of an employee or worker suffering from a disease defined in an ordinance of the Minister of Health [9], before the dismissal the opinion of the Labor-expert medical committee is taken. Disciplinary dismissal of a worker or employee who is a member of a trade union is only possible with the prior consent of a trade union body designated by the decision of the central management of the trade union concerned.

The safeguard procedure under Art. 333 LC correctly provides mechanisms to protect vulnerable categories of workers (employees, mothers of children up to 3 years of age, workers, suffering from certain diseases) from possible arbitrariness of the employer. Probably, the members of the trade union leadership are covered by this procedure for the same reasons - protection against employer arbitrariness. In our view, however, the preliminary protection against dismissal of trade union leaders, special negotiating bodies or representative bodies does not solve, but deepens the problems - above all because some workers who are threatened by disciplinary punishment with their conflicting behavior and systematic violation of labor discipline, purposefully engage themselves in trade union activities, to avoid punishment. In addition, such an approach leads to the politicization of the problem and to the circumvention of its essence, which is to impose a just penalty on workers who, through their systemic and deliberate actions, create a threatening environment for other workers and undermine their dignity. Such workers respond to attempts to seek disciplinary responsibility by presenting themselves as victims of harassment in the workplace.

It could also be considered to revise a part of the provision of Art. 333 (1), item 3 and respectively - of Ordinance № 5 in the part on the preliminary protection of workers suffering from mental illness. There are professions whose social purpose is incompatible with the signs of certain mental illnesses and the workers practicing such professions should require annual review and certification by a psychiatrist. When proving the presence of such a disease, the worker concerned should be offered a re-assignment of more appropriate work.

These considerations outline the framework of a fundamental issue, the importance of which is increasing. This is the half-way and one-sided implementation of international and European anti-discrimination acts, resulting in the violation of the rights of persons who do not conform to discriminatory signs. In the literature on the types of discrimination, this is called "reverse (positive) discrimination" and is considered to be "an acceptable form of discrimination against members of a superior or predominantly social group for the benefit of members of a minority or historically disadvantaged group" [10]. Its goal is to compensate the historically existing inequality. On the other hand, Karl Popper formulates the thesis of the "paradox of tolerance", according to which „unlimited tolerance must lead to the disappearance of tolerance. If we extend unlimited tolerance even to those who are intolerant, if we are not prepared to defend a tolerant society against the onslaught of the intolerant, then the tolerant will be destroyed, and tolerance with them“ [11].

3. CONCLUSION

In the field of labor relations, the unilateral application of international and European anti-discrimination acts leads to a conflict of rights at the workplace. Defining the term "harassment" through discriminatory signs leaves a gap in legislation, which makes it possible for some workers to be victims of aggressive and degrading treatment by other workers without being effectively protected by the employer. In view of this, it is appropriate to make the following proposal *de lege ferenda*: 1 / The legal definition of the term "harassment" contained in the Additional Provisions of PADA is inaccurate and insufficient. The text of Art. 5 is sufficient,

according to which harassment based on the signs under Art. 4 (1), sexual harassment, incitement to discrimination, persecution and racial segregation, as well as the building and maintenance of an architectural environment hampering the access to public places of people with disabilities, shall be considered discrimination. A broader wording of the notion of harassment is needed, not only in terms of psychological harassment in the family, school harassment, or harassment based on discriminatory signs. Perhaps such a wording should be contained in the Criminal Code, and the hypothesis of harassment should lead to criminal liability regardless of where and how it occurs; 2 / To amend the text of Art. 333(1), item 5, 5a, 6 and para. 3 LC, which provide for a protective mechanism against the dismissal of trade union leaders, special negotiating bodies or representative bodies; 3/ to add to the provisions protecting workers suffering from mental illness a text obliging the employer to redirect them to appropriate work compatible with the symptoms of the disease.

The proposals aim not only at filling gaps in the legislation. They are also based on the belief that European and international anti-discrimination acts have already fulfilled their purpose - to compensate historically imposed discriminatory practices. In the modern age, whose civilization is marked by human rights[12], reflections on the meaning of tolerance and non-discrimination lead to questions about their borders. The passage beyond these borders leads to violation of the rights of other individuals and creates new inequalities. The overexposure to these indisputable, fundamental, universal human values more and more distances them from the meaningful workload that led to their validation.

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SWITCHING MARKETING CHANNEL IN THE PURCHASE PROCESS - WHAT PUSHES CONSUMERS TO CHANGE BEHAVIOR

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Abstract: *This paper investigates the factors affecting intention to switch the distribution channel during purchase process. The change in the sales channel has been defined as a change in the original plans for the place of purchase of the product under the influence of external factors. Author tests different factors that influence customer behavior: marketing activities of companies, different product price, positive WOM, personal factors - e.g. time pressure, company error - e.g. system failure. The conclusions from the quantitative research allow author to indicate some practical tips for companies that redirect consumers to remote purchase channels. In the article data from the questionnaire survey have been used (research sample 1103).*

Keywords: *marketing channel, purchase stage, switching channel, Omni channel distribution.*

1. INTRODUCTION

Customer switching behavior may occur in different way. Customer may switch channel in one of the purchase stage (eg. information search), they may also switch channel during the purchase journey (eg. search for information via internet purchase offline) or switch service/product provider due to changing channel and provider during one or different stage of purchase process. All these phenomena can occur separately or together in a single purchase process.

Research in this field most often concern the channel change in the buying process or changing a supplier. The first one is connected with the “research shopper” [1]. Customer search product through one channel and purchase it in another one. According to Verhoef, Neslin and Vroomen [1] this behavior is determined by different channel attributes, no channel lock-in and cross channel synergy. Changing the channel sales can be linked to the simultaneous change of supplier. What note Chiu et al., changing the channel may be associated with the switching the provider (search online at company A, offline purchase in the company B) but the consumer may also switch the supplier without changing the channel (eg. when search product online in company A and buys it online in B company) [2]. Simultaneous switching channel and provider, these authors call cross-channel free-riding, which is prompted by the customers’ perceived self-efficacy to use multiple channels. Customer switching behavior is most often presented in relation to change the supplier, in particular services provider basis on customer subscription or membership [3]. Chuang and Tai conclude that in the research on switching suppliers, satisfaction, switching cost and attractiveness of alternatives appear most often as a predictor of switching intention.

The purpose of this article is to present the motives to change the sales channel during the purchase phase. Suppliers increasingly encourage consumers to change channels from

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traditional to newly launched remote distribution channels. As Trampe, Konus and Verhoef show, companies can use different strategies of consumer migration to e-channel [4]. They have proven that reward strategies in encouraging migration to the e-channel evoke a much smaller consumer reactance than punishment strategies for using traditional channels. In his study, the author tests various situational factors, elements of the impact on consumer's behaviour environmental influence, and depending on the company to check what may change the original plans for the use of a specific channel in order to purchase a service. The aim of the article is to answer the following research questions:

1. What are the most common reasons for changing the marketing channel at the purchase stage?
2. Who is more likely to change the distribution channel?
3. How can this knowledge be used to encourage consumers to use remote channels more often.

2. CUSTOMER JOURNEY IN BUYING PROCESS

“Customer journey” approach is seen by some authors as starting point for developing an effective multichannel strategy [5]. According to [6] multi-channel customer management refers to the design, deployment, coordination, and evaluation of channels to enhance customer value through effective customer acquisition, retention, and development. The goal of multiple channel provision is to enhance customer value proposition and reach more customers [7]. Neslin and Shankar [8], in reference to multichannel retailing, have formulated some important questions about customer’s right channeling. They ask two questions: Should customers be encouraged to use the “optimal” channel? Should customers be forced to use the “optimal” channel? There is a general consensus among researchers that the main differences between multichannel retailing and omnichannel refer to level of channel scope, its integration and objectives [9] [10] [11]. Saghiri [12] stated that the omni-channel framework includes virtually infinite sets of customer value-adding journeys via different channel stages, types and agents. As a result of omnichannel strategy, in each set, flows of goods, services, and information depend on the customer's choice(s) as well as dynamic arrangements among the channels. As is stated in [13], a crucial decision companies need to ask nowadays is which channels they should make available to customers for transactions. The challenge for retailers, however, is caused by the fact that nowadays consumers are faced with many opportunities through which they can search, compare, purchase and obtain products [11]. Berman and Theler [14] indicate three aspects of differences in consumer behaviour. Among these elements are the following: the consumer purchase journey design (uniform vs different and linear vs non-linear), the place of purchase vs the location of pickup and return and the degree of effort a consumer needs to undertake as he/she moves across channels and devices. What is more, these authors indicate that in contrast to multichanneling, omnichanneling assumes that consumers can have very different purchase journeys. While in multichannel shopping buyers have rather linear purchase journey, shoppers in omnichannel environment use multiple channels and touchpoints and they can employ a nonlinear purchase journey. Another important characteristic of omnichannel is connected with much higher easy of movement across channel and devices that in multi channel environment [14]. The goal is to minimize the effort of moving from one contact channel to another – to make these movements seamlessly [11]. Undoubtedly some customers may be reluctant to switch to a new channel when they are already familiar with an existing channel [14]. Some authors [15] note the importance of offline experience for the intention to use new channel – an online store. According to them, the offline environment is important when consumers start to shop in the new online channel, however becomes less important in favor of the online environment when consumers get familiar with online grocery shopping. Another

researchers claim that the offline beliefs, attitudes and behaviours make a strong impact on online loyalty [16]. However, the phenomenon of marketing channels proliferations as well as touchpoints [11] and the reality of shifting from multichannel retailing towards omnichannel retailing [17] create more and more opportunities for the buyer to change channels in the purchase process. It seems that the more possibility to change marketing channel the biggest influence of any potential factors on channel switching.

One of the main factors that can affect channel switching decision is price. As long as the price of the product/service is not unified across all available channels, the price difference may be a factor encouraging channel change decision. In case of every multichannel transaction the decision whether and how to implement channel-based price differentiation should be made. Due to self-selection into a preferred channel-price combination the channel-based price differences is a form of second degree of price differentiation [18]. As is stated by [19], the influence of price difference in multichannel retailing on consumers' fairness perceptions depends on the price frame and norm perceptions. According to research, consumers are characterized by different preferences towards the marketing channel. This may be due to both inherent channel attributes and the willingness to pay of particular buyer [20]. As is stated in [21], channel-based price differentiation is perceived in an ambivalent manner; interchannel price differences have positive impact on buyers perceptions of value, increase relationship quality and enhances repurchase intentions, but it also leads to perceptions of price unfairness and limits customer self-determination, which negatively affect retention outcomes.

Another factor that can affect decision on switching marketing channel in the purchase process is negative prior experience with particular marketing channel or system failure at a particular moment. Findings provided by [22] show substantial differences in the effectiveness of received WOM across countries. By analogy to the fact that word of mouth (WOM) is fundamental to the product discovery process of consumers [23], probably WOM can also influence decision on choosing another marketing channel. Based on Keaveney's [24] model of customers' service switching behavior one can identify some vital factors for switching marketing channel. In original model eight factors have been indicated:

- 1) pricing (prices are too high, deceptive, or unfair relative to the perceived value of the service offering),
- 2) inconvenience (location/hours, wait for appointment, wait for service),
- 3) core service failure (service mistakes, billing errors),
- 4) service encounter failure (uncaring, impolite, unresponsive, unknowledgeable),
- 5) response to service failure (negative response, no response, reluctant response),
- 6) competition (customer found a better service provider),
- 7) ethical problems (cheat, hard sell, unsafe, conflict of interest),
- 8) involuntary switching (customer moved, provider closed).

Taking into account the essence of factors mentioned above, almost every has something in common with the decision on switching marketing channel. As indicated by [25] cultural differences can play an important part in understanding service consumers' switching behaviors. The open question remains whether cultural differences are important in the decision to change the channel as part of cooperation with one service provider.

3. RESEARCH METEDODOLOGY

The study was conducted at the end of the year 2015 on a group of 1103 respondents. The research sample was collecting using a quota-random method (the quotas referred to age and gender and the nature of the place of residence). The random route method was used to selected household. Starting points were drawn from the address database. Within the drawn household, a person who has most recently celebrated a birthday was invited to participate in an interview. Information was collected through interviews with mobile devices (CAPI method). A standardized questionnaire was used to collect data, and questions about switching behavior were coded in a 5-level Likert's scale (1 – strongly disagree, 5 – strongly agree). The questions concerned consumer behavior with regard to financial services, telecommunications services and personal transport, not a single services provider. The characteristics of the study sample are presented in Table 1.

Table 1: The study sample characteristics

| | Characteristics | Number of respondents | Percentage of sample |
|-----------------------------------|--------------------------|-----------------------|----------------------|
| Gender | Female | 565 | 51.2 |
| | Male | 538 | 48.8 |
| Generation | Baby boomers (1946-1964) | 357 | 32.4 |
| | X (1965-1980) | 390 | 35.4 |
| | Y (1981-1996) | 356 | 32.3 |
| Employment status | Full-time employed | 608 | 55.1 |
| | Part-time employed | 82 | 7.4 |
| | Self-employed | 74 | 6.7 |
| | Unemployed | 123 | 11.2 |
| | Retired | 185 | 16.8 |
| | Other | 51 | 2.8 |
| Number of people in the household | 1 | 108 | 9.8 |
| | 2 | 329 | 29.8 |
| | 3 | 323 | 29.3 |
| | 4 | 245 | 22.2 |
| | 5 or more | 98 | 8.8 |

Source: own research

The change in the sales channel has been defined as a change in the original plans for the place of service purchase under the influence of different factors. Several factors influencing the change marketing channels at the purchase stage were identified:

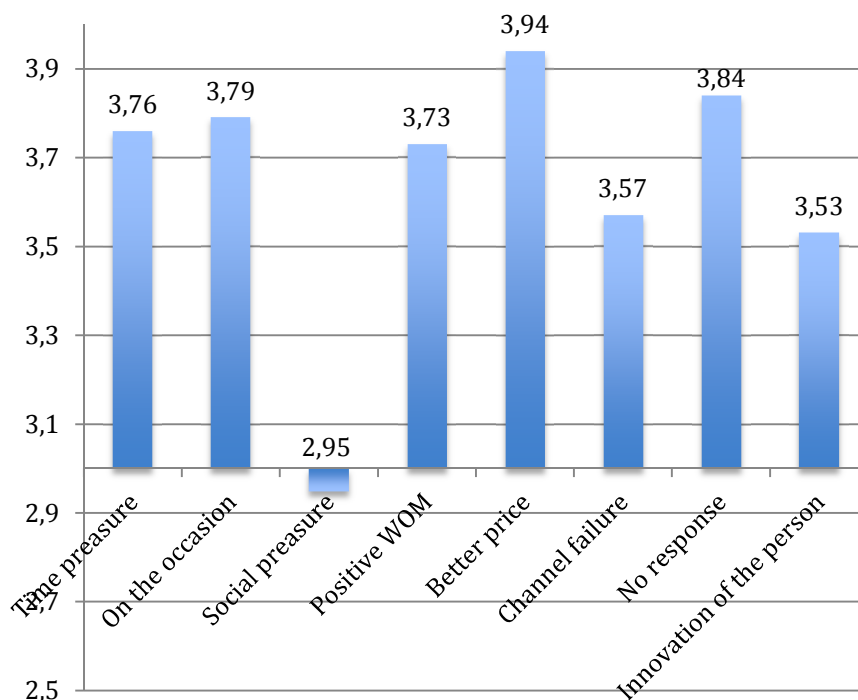
- Time pressure - the need to quickly use the service;
- On the occasion - something is on the way, for example, a bank branch;
- Social pressure - none of my friends use this marketing channel anymore;
- Positive WOM (recommendation) - someone made me realize how it can be done more efficiently;
- Better price - cheaper service is available only in a specific sales channel;
- Channel failure - you can not use the preferred channel temporarily;
- No response - the service provider does not resolve the issue in the preferred sales channel;
- Consumer innovation - the tendency to try a new marketing channel.

When comparing the list of factors with Keaveney's study, it can be noticed that the author has excluded factors based on competition or switching off channels, but the recommendation or pressure of other people has been added.

4. DETERMINANTS OF CHANGING CHANNEL AT THE PURCHASE STAGE

In the first step the mean score answers regarding to reasons for all respondents were calculated. The most common reason for changing channel is the cheaper offer available only in a specific sales channel. The next one is lack of response - the service provider does not resolve the issue in the preferred sales channel. The t-test for dependent sample shows that the mean differences between these two reasons are statistically significant. All answers are presented in Figure 1.

Figure 1: Reason for changing distribution channel at the purchase stage



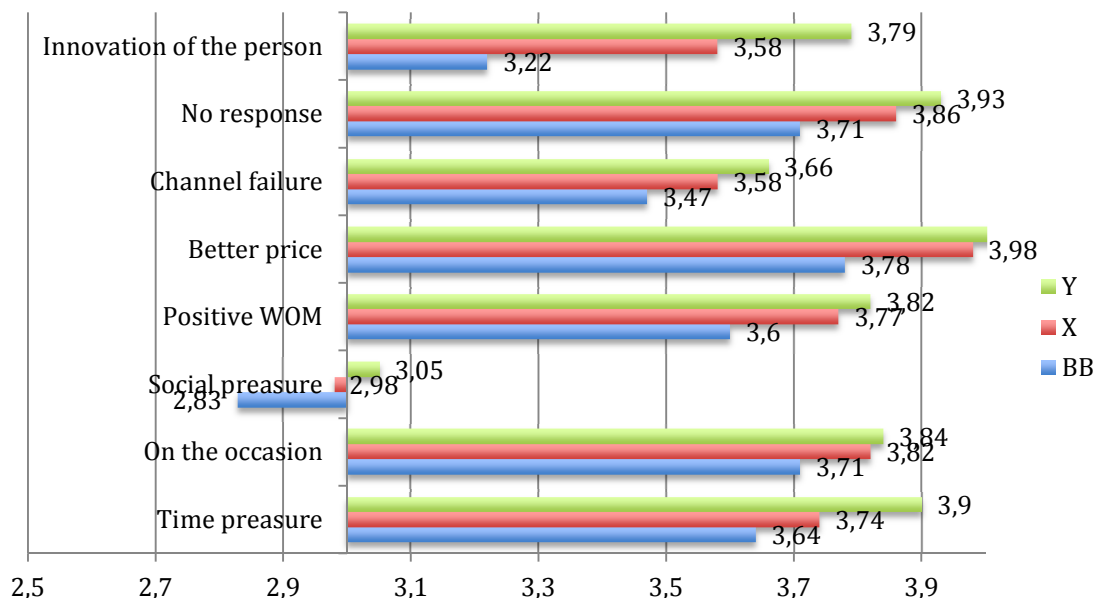
Source: own research

The least common reason for changing the sales channel is the “social pressure” and “personal innovation”. The influence of the other people behaviour through their choices of places of purchase has no impact on changes in consumer decisions in contrast to the positive WOM, which is much more important for consumers decision making process.

The next step in the analysis of the collected data was to analyze the reasons for changing channels through different consumers’ generations. Comparison of the answers of representatives of the Baby Boomers generation, X Gen and the Y Gen indicates that the youngest generation is much more likely to change the decision regarding to the originally chosen purchase channel. Games-Howell test showed that, in the case of better price, there are statistically significant differences between the assessment of the impact of price advantage on intention to change original channel between the generations Y, X and BB (no significant differences between Y-Gen and X-Gen). The order of the factors in case of Y-Gen also changes – “better price”, “no response” and “time pressure” most often influence the channel preferences (Figure 2). In case of the older generations, "by the occasion" is the third reason for changing the purchase channel. The greatest absolute differences in the assessments of the

factors concern personal innovation. In this case, the younger generation is, the more innovative consumers are.

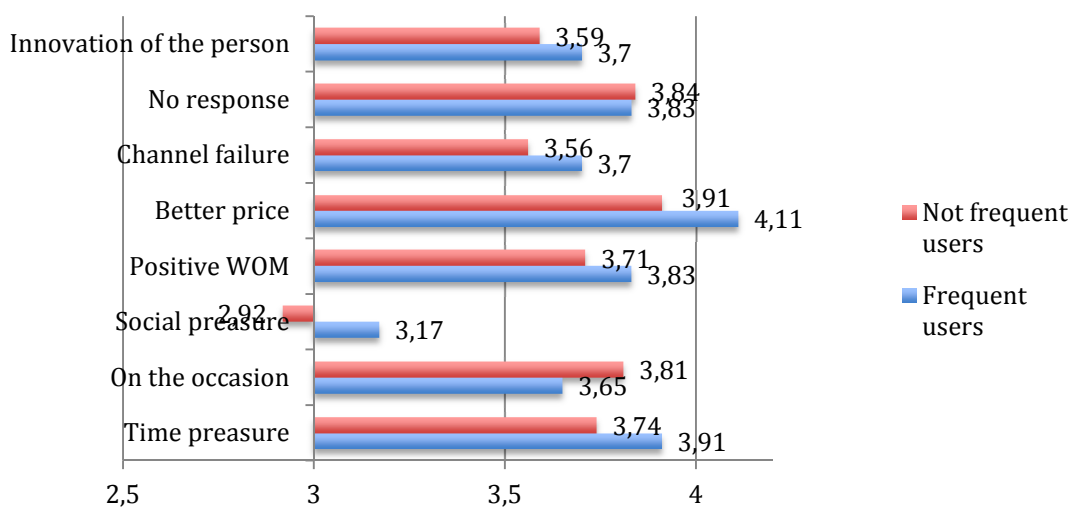
Figure 2: Reason for changing distribution channel at the purchase stage – consumer generation comparison



Source: own research

The last of the comparison concerns consumers who are the frequent buyers of services on the Internet (at least once a month) and those who are not buying on the internet very often (once a quarter or less frequently). In the case of frequent users, the most important reason for changing the channel are “better prices”, “time pressure” and equally “no response” and “positive WOM”. Not frequent users online channel switch their behaviour due to better price, no response and on the occasion (Figure 3).

Figure 3: Reason for changing distribution channels, different intensity of online channel usage



Source: own research

The results confirm that Internet users are more likely to look for better product prices, have more freedom to choose a marketing channel, and more often use the advice of other people, often available online.

5. CONCLUSIONS

Research results on switching marketing channel in the purchase process are as follows:

1. The biggest influence on the change of marketing channel at the purchase stage has better price in specific channel, the lack of response and the possibility to use a different channel on the occasion.
2. More prone to change the channel displays Y gen, the smallest the Baby Boomer gen.
3. For young generation the reason to change channel are better price, lack of response and time pressure.
4. More frequent users on-line channel are more likely to change channel due to better price, time pressure, no response and positive recommendation from people who use the on-line channel occasionally.

In order to influence the customer marketing channel choice, the easiest way is channel-based price differentiation, in particular in relation to younger buyers, who are more familiar with the internet technology. If not the price, positive WOM may be a reason for choosing a new, innovative channel for purchase services. Negative factors affecting the place of services purchase include, in particular, the lack of response to consumer needs (visible particular in remote channels) and channel failure which factors should be avoided so as not to hinder access to services in channels preferred by consumers.

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CUSTOMER-INITIATED COMMUNICATIONS WITH THE SERVICE PROVIDER VIA PHONE CHANNEL - FACTORS AFFECTING BEHAVIORAL INTENTION

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Abstract: *This paper investigates the factors affecting intention to use phone channel at the after-sales service in service buying process. Author looks at the communication at post-purchase stage via phone channel as the customer-initiated communications with the service provider. Conventional phone channel has evolved towards the mobile marketing channel; however, some factors do not lose in importance – perceived media richness, consumer trust and perceived risk. In the article data from the questionnaire survey is used (research sample 1103).*

Keywords: *customer-initiated communications, CIC, marketing channel, post-purchase stage, after-sales support, communications via phone*

1. INTRODUCTION

There is a consensus among researchers that in multichannel retailing effective channel strategy is of great importance for every company [2] [38]. It is also argued that communications are an important factor of marketing channels [34]. As it was stated by [31, p. 36], communications can be described as the glue that holds together a channel of distribution. It is vital not only due to the possibility to obtain new customers but also due to the creation of consumers experience [28]. The distribution channels should be seen as a representation of a system of economic and social interactions [28]. Therefore, different types of communication can be identified and analyzed, business-to-business has its own specificity [8] as well as business-to-consumer. In the latter case customer-initiated communication (CIC) also merits attention. Taking the point of view of consumers, it is visible that the communication is a crucial element of the service experience [7]. As is stated in [46] [22] creation of superior customer experience is seen as one of the main goals of multichannel retailing. Due to learning and habit through the obtaining experience the probability of continuing to use the same channels from the past is rising [44].

In this article author focuses on after-sale service as the customer-initiated communication at the post-purchase stage in service buying process. The main research goal is to verify hypothesis about the influence of particular factors on intention to use phone channel¹⁴² at the post-purchase stage. By analogy to the definition presented in [39], in this article customer-initiated communications refer to any communication with a service provider that is initiated by a customer by phone channel at the post-purchase stage in service buying process.

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¹⁴² The research concept did not distinguish between type of phone used by customer – mobile phone or conventional stationary phone.

2. CONSUMER COMMUNICATIONS VIA DIFFERENT MARKETING CHANNELS

In general, communications refer to the amount, frequency, and quality of information shared between exchange partners [35]. Marketing communications can also be seen as the tool for differentiating and creating competitive advantage for itself and its products as well as the valued factors in building relations with customers [25]. Some authors put an emphasis on the importance of the integration of new electronic channels within an overall marketing strategy [13]. Madden and Perry [25] provide research findings that the quality of the communications with a particular institution is important to them. One of the elements of communications quality is duration of waiting for information. Prompt customer service (one of the elements is the information provision) is a competitive advantage in the market for service-oriented industries [32]. The speed of service has been associated with positive customer evaluation in terms of service quality and satisfaction. Constantly striving to improve customer satisfaction [41] seems to be a permanently crucial issue. However, as is stated by [1], every industry has its own critical success factor known as threshold resources, that are required for a firm to survive in the industry. According to the research literature, customer-initiated contact (CIC) are perceived as the valuable source of information about consumers' thoughts and problems. Therefore, CICs are one of the important elements of the process of customer management [3]. Undoubtedly changes in the field of information and communications technologies promote the growth of the importance of the CIC.

Taking into account the huge progress in the area of marketing communications, new marketing channels (e.g. mobile channel) should be perceived as the subsequent but not as substitute for traditional channels [30] in the process of communication with clients. As is indicated by researchers [12] [9] [10] the influence of mobile devices on customers' online shopping behavior is unquestionable. The issue truly important to marketing channels management is how retailers can steer customers to strategically important channels [18]. As is stated by researchers, communication can play a vital role in that area. Interesting findings are provided in [38]. These researchers have aimed to understand the process of choosing the available marketing channel by customers. In that research approach, authors put an emphasis on the two types of interactions such as purchases and communications. According to them the nature of each of interaction has an impact on customer behavior in multichannel environment. Finally, communications are seen as the area where there is higher effectiveness of marketing activities at driving channel choice.

In [45] it is noted that the main reason for choosing particular marketing channel is searching for the environment that supports their requirements for interaction the best. Therefore, service suppliers need to reflect on the role that communication channels play for the customer. Researchers note that consumer shopping value can be transferable from one retail venue to the other, further to another venue [16]. What is more, according to them, consumer shopping value is the key factor that can result in consumer satisfaction with shopping, as well as loyalty intention toward shopping. Not without a reason obtaining customer delightful is proposed as one of challenges in order to develop an integrated omni-channel customer experience [29]. Authors of [18] pay attention to the possibility to induce customers to switch to offline channel by communicating information about channel integration on their websites (online channel). The problem of customer migration toward online channel has been widely analyzed by [43]. These researchers provide findings that customer loyalty has an important meaning for the results of migration strategy. However, the main conclusion refers to the link between type of migration strategy and potential effects of this strategy. Authors of [33] also provide some arguments for redirecting clients to the target channel. The reason for such an attitude is higher

costs and unrealized opportunities to increase revenues. Instead, customers must be guided to the right mix of channels for each product or service.

Unlike the firm-initiated marketing communications that very often lead to a potential customer purchase [37], customer-initiated communications at after-sales service stage can lead to discussion with client, service recovery or additional purchase. Due to the potential consequences of poor contact with service supplier (dissatisfaction, negative word-of-mouth, etc.) a special attention should be put on communication via phone. The main reason for using this type of remote marketing channel is a wide defined customer convenience. This marketing channel has evolved from conventional stationary phone enabling only the conversations through cell phone (SMS, MMS) towards smartphones (Internet access).

Due to the subject of analysis, that is phone channel in customer-initiated communications process, another important issue is perceived media richness of this medium. Since the Media Richness Theory (MRT) was firstly developed by Daft and Lengel [5] numerous other works have studied the phenomena of perceived media richness [17] [42] [4]. Media richness refers to the potential information carrying capacity of data [5]. Media richness theory explained media choice as a rational process resulting from a match between the task and medium characteristics [19]. It suggests that voice-based communication is ranked higher than text-based communication along the media richness continuum [5], however some additional findings have been also exposed. Several authors [21] [23] have noted that the medium itself does not necessarily determine its perceived media richness, however these findings were proposed in reference to online channel. As it was stated, communications media differ in the richness of the information processed. This division into lean and rich is based on characteristic as follows: feedback capability, the communication channels utilized, language variety, and personal focus. In general, the more a medium incorporates these characteristics, the richer it is [42]. In a traditional continuum of perceived media richness phone channel is seen as high in media richness, leaner only than face to face contact [42]. According to research [39], customer-initiated communications via phone channel is preferred when consumer faces an extended problem-solving (high perceived risk/low familiarity). Whereas, in case of routine problem-solving situation online channel is preferred. Thus, taking into account the specificity of after-sales service phone communication seems to be appropriate.

3. RESEACH METHODOLOGY

Sampling and Data Collection

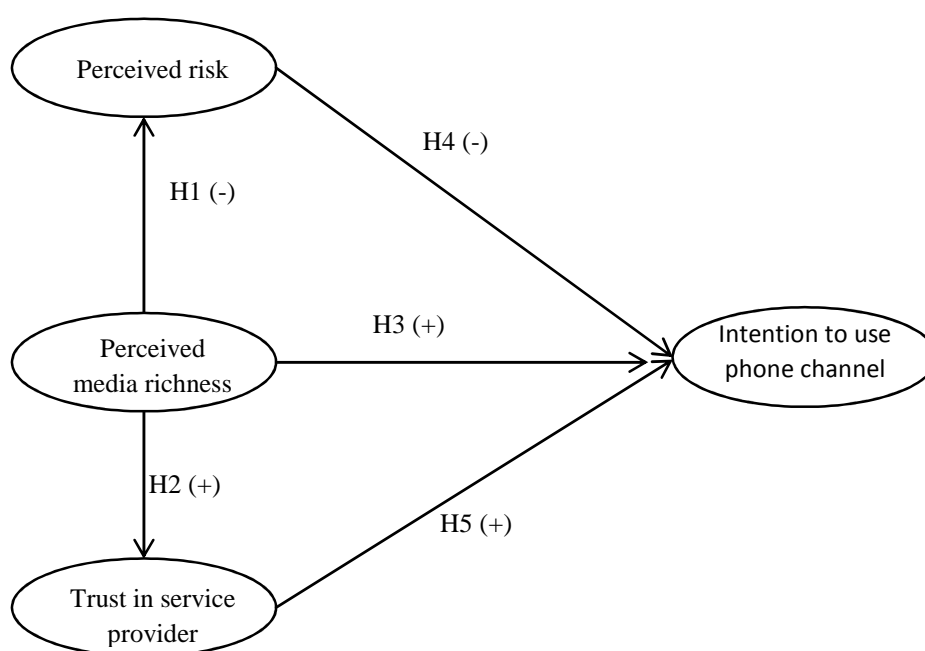
The study was conducted in September-November 2015 on a group of 1103 Polish respondents (including 357 from a Baby boomers generation, 390 from the X generation and 356 from the Y generation). The research sample was determined by quota-random method, quotas due to age and gender and the nature of the place of residence (city provincial, city other than provincial, village) – the structure of sample was preserved at the regional level (16 voivodships in Poland).

Much research effort has been devoted to examining the influence of some factors on behavioral intention in the environment. However, in author's opinion phone channel seems to be neglected in research analysis. For this reason, in this paper the research model (fig. 2) in reference to post-purchase stage (after-sales service) in service buying process and customer-initiated communications via phone channel will be tested.

Based on the literature the following research model is proposed (see Fig. 1). Five hypotheses derived from the model are as follow:

- H1: Perceived media richness has negative effect on perceived risk at the pre-purchase stage
- H2: Perceived media richness has positive effect on trust to service supplier at the pre-purchase stage
- H3: Perceived media richness has positive effect on intention to use phone channel at the pre-purchase stage
- H4: Perceived risk has negative effect on intention to use phone channel at the pre-purchase stage
- H5: Trust in service provider has positive effect on intention to use phone channel at the pre-purchase stage

Figure 4. The proposed research model – the post-purchase stage via phone channel



Source: Own research.

All measurement items for the principal constructs used in this study were based on seven-point Likert-type scales anchored at 1- strongly disagree, 4-neutral, and 7-strongly agree. Please refer to the items in the table 1.

Table 6. Items – detailed characteristic

| Construct | Items | Cronbach's alfa |
|--|--|-----------------|
| Trust (T) Adapted from [12] | T1: When getting after-sales service via phone channel I can trust to service provider. T2: I can rely on after-sales service via phone channel. T3: Service provider keeps his promises and commitments concerning after-sale service via phone channel T4: When getting after-sales service via phone channel I know that the service provider keeps my best interests in mind. | .915 |
| Perceived risk (R) Adapted from: [27] [36]. | R1: After-sale service via phone channel may lead to adverse consequences. R2: While getting after-sale service via phone channel I am afraid to disclosure of personal data. | .764 |

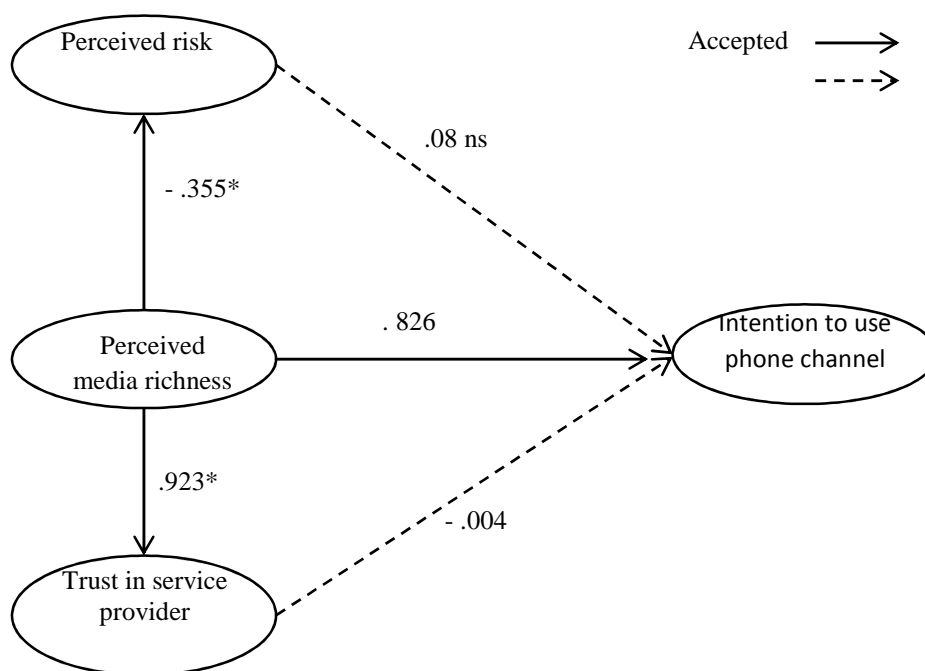
| | | |
|--|---|------|
| | R3: After-sales service via phone channel is risky. | |
| Perceived media richness (MR) adapted from [24]. | MR1: While after-sales service via phone channel, I can get an immediate feedback; MR2: Contact via phone channel is suitable during after-sale service; MR3: While after-sale service via phone channel, I can get multiple types of information | .830 |
| Intention to use online channel (IU) Adapted from: [40]. | IU1: There is a good chance that I will use phone channel during after-sales service. IU2: Most likely I will use phone channel during after-sales service. IU3: I intend to use phone channel in the future in order to after-sale service. | .961 |

Source: own research.

Research Findings

Most of model fits have reached the expected level (see figure 2): CMIN/DF 2.699 DF = 60, GFI .977, AGFI .965, RMSEA .039 (LO 90 .032 – HI 90 .047), PCLOSE .993.

Figure 5. The research model



Note: * $p < .001$; ns – nonsignificant
Source: Own research.

4. DISCUSSION

Research findings put a strong emphasis on the importance of perceived media richness of phone channel. According to research model this characteristic of phone channel has both direct and indirect impact on behavioral intention. First, the perceived media richness of phone channel has significant influence on consumer trust to service provider in phone channel. What is more, in presented research model the perceived media richness explains explain 85% of consumer trust. Second, perceived media richness significantly affects perceived risk and to some extent mitigate its negative impact on intention to use phone channel at the post-purchase

stage. And finally, perceived media richness has strong positive direct impact on behavioral intention. The results concerning the lack of importance of trust must be considered as quite surprising and deserve for further attention. However, the lack of a significant impact of perceived risk on the intention to use phone channel can be justified by the strong impact of perceived media richness.

Provided findings can be seen as contribution towards better customer service at the post-purchase stage that is also very important to service buyers [20]. While m-commerce is still in its infancy, phone channel (smartphones) is preferred for pre- and post-purchasing activities [26]. In case of analyzing the intention to use phone channel in customer-initiated communications some important social (demographical) changes should be taken into account. One of the challenges that refer to contemporary society in high development countries is the information and communication technology revolution, as well as the demographic shift [15]. Another essential issue creates challenge for multichannel service providers is the integration of information accessible on mobile devices and on websites. Becoming customer centric should be the desire of every conscious service provider [29], if none of the available marketing channels can achieve the stated objectives. Even if digital marketing communications are seen as one of the most important industrial marketing communication tools [14], each marketing channel that is provided to customers should be managed and coordinated in the best possible way.

5. RESEARCH LIMITATIONS AND FUTURE RESEACH DIRECTIONS

Although the results of this study have useful implications, some limitations must be considered. First limitations refer to individual components of perceived risk as well as consumer trust. The perceived risk that was analyzed as a whole, not as a set of individual components of perceived risk. Author also resigned from analyzing the direct relationship between perceived risk and trust. Second limitation implies to the fact that a comprehensive set of factors affecting intention to use phone channel at the after-sales support have not been included. Omitted variables need to be addressed in future research. Finally, due to rising m-commerce popularity a specific research attention should be put on mobile phone with its advanced functionality based on ICT.

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PROMJENA STAVOVA I PONAŠANJA POTROŠAČA POSREDSTVOM INTEGRIRANE MARKETING KOMUNIKACIJE

CHANGING ATTITUDES AND CONSUMERS BEHAVIOR WITH INTEGRATED MARKETING COMMUNICATION

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Sadržaj: *Promjena ponašanja ovisi o osobnim stavovima, vrijednostima i uvjerenjima. Posredstvom integrirane marketing komunikacije prenose se poruke koje ističu pozitivne posljedice ponašanja i navode negativne u okviru društvenog marketinga, a koje mogu utjecati na svijest pojedinca da promjeni mišljenje odnosno ponašanje iz neželjenog u željeno. Identifikacijom ključnih osoba i njihovih stavova i ponašanja utječe se na ciljnu skupinu kao i na stavove, svijest i ponašanje potrošača.*

Ključne riječi: *integrirana marketing komunikacija, društveni marketing, stavovi, ponašanje potrošača*

Abstract: *Changing behaviour depends on personal attitudes, values, and beliefs. Through integrated marketing communication, messages that point out the positive consequences of behaviour and indicate negative within social marketing can be transmitted, which can affect the individual's awareness of changing the mind set or behaviour from unwanted to wanted. Identifying key people and their attitudes and behaviour affects the target group as well as the attitudes, awareness and behaviour of consumers.*

Keywords: *integrated marketing communication, social marketing, attitudes, consumer behaviour*

1. UVODNO

Stavovi su trajni sustavi pozitivnog ili negativnog ocjenjivanja, osjećanja i tendencije da se preuzme akcija za ili protiv, a u odnosu na različite objekte i situacije [1]. Stav je psihološka varijabla koja se ne može osjetiti niti vidjeti, a u okviru stavova proučavaju se tri komponente i to: spoznajna (kognitivna), osjećajna (afektivna) i ponašajuća (konativna). Nastaju kao rezultat socijalizacije pojedinca, a koncept su misaone strukture, znanja, uvjerenja, vrijednosti i dr.

Marketinškom komunikacijom potrebno je prvenstveno utjecati na stav i promjenu stava i to utjecajem na komponente kao i na funkcije stavova kako bi se posljedično utjecalo i na promjenu ponašanja. Integrirana marketinška komunikacija je proces razvoja i primjene različitih oblika persuazivne komunikacije s potrošačima i potencijalnim kupcima u određenom vremenu [2]. Primjenom integrirane marketing komunikacije prenose se poruke koje ističu pozitivne posljedice ponašanja i navode negativne u okviru društvenog marketinga, a koje mogu utjecati na svijest pojedinca da promjeni mišljenje odnosno ponašanje iz neželjenog u

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željeno. Persuazivnost ima za cilj promjenu stava ili ponašanja kao rezultat djelovanja komunikacijskih apela na kognitivni ili afektivni dio potrošačeve svijesti ovisno o stupnjevima visoke ili niske uključenosti samog pojedinca.

Motivacija ima važnu ulogu u primanju informacija s obzirom da visok stupanj motivacije uvjetuje utjecaj na argumente u poruci i na stavove kao i na ponašanje. U ovisnosti o motivima, korisnosti i zadovoljstvu u marketinškoj komunikaciji stavlja se naglasak na emocionalne dijelove poruke. Prihvatanje sadržaja komunikacije ovisi o znanju, argumentiranosti poruke, ali i sadržaju same poruke.

U radu se govori o integriranoj marketing komunikaciji i mogućnostima njene primjene s obzirom na teorije promjene ponašanja pojedinaca u pogledu njegove brige za zdravlje odnosno preventivno zdravstveno djelovanje. Ovisno o stavu pojedinca prema svome zdravlju treba odabrati onu marketinšku komunikaciju kojom će se promovirati zdravlje i specifični ciljevi te ukazivati na korisnost promjene ponašanja ka stvaranju novih navika kako bi se preventivno i terapijski djelovalo na zdravlje pojedinca i društva u cjelini.

2. TEORIJE PROMJENE PONAŠANJA I NJIHOV UTJECAJ NA PROMJENU STAVA

Proces donošenja odluka u zdravstvenom ponašanju pod utjecajem je informiranosti i znanja kroz medijske kampanje, savjete, radionice, skupove i dr. koje su poticaj za poduzimanje određene akcije. Stupanj elaboriranja novih informacija u spoznajnu strukturu potrošača ovisi o motivaciji i sposobnosti primatelja za procesiranje poruke. U slučajevima niske motiviranosti ili nesposobnosti pojedinca da prihvati poruku koristi se periferni put elaboriranja, čiji je utjecaj samim tim mnogo manji [3].

Teorije koje govore o zdravom i preventivnom zdravstvenom ponašanju objašnjavaju oblike ponašanja i aktivnosti koje poduzimaju osobe u brizi za zdravlje. Pozitivnim zdravstvenim ponašanjem naziva se ono koje poduzimaju osobe koje žele unaprijediti vlastito zdravlje i smatraju se zdravima. Preventivno zdravstveno ponašanje poduzimaju osobe koje smatraju da su zdravstveno ugrožene, dok se bolesničkim ponašanjem ili onim u ulozi bolesnika podrazumijeva ono zdravstveno ponašanje za brigu za zdravlje temeljeno na uputama i savjetima liječnika.

Prema modelu zdravstvenih uvjeravanja potrebno je shvatiti uvjete koji su potrebni da bi se promjena ponašanja dogodila. Pojedinaac će poduzeti mjere da prevenira, istraži ili kontrolira bolest ili određeno stanje na temelju slijedećih čimbenika percipirane: ugroženosti, ozbiljnosti, koristi, prepreke, akcije i samoefikasnosti.

Teorija planiranog ponašanja kao najvažniju odrednicu ponašanja navodi namjeru koja utječe na određeno ponašanje u određenoj situaciji pod utjecajem: uvjerenja pojedinca o vjerojatnosti pozitivnih ili negativnih posljedica ponašanja i njihove važnosti, uvjerenja pojedinca o tome što osobe koje su njemu važne misle o ponašanju i koliko je on sam motiviran da zadovolji njihova očekivanja i percepcije, te o snazi vanjskih čimbenika koji olakšavaju ili otežavaju promjenu ponašanja. Na promjenu ponašanja pojedinca utječu poruke koje ističu pozitivne posljedice ponašanja i navode negativne, te identifikacijom ključnih osoba i njihovih stavova i ponašanja utječu na ciljnu skupinu.

O promjeni ponašanja na koju utječu čimbenici unutar pojedinca, ali i iz okoline govori teorija socijalnog učenja koja ukazuje na činjenicu da se promjena ponašanja uči u specifičnom

društvenom okruženju bilo kroz oponašanje ili putem osobnog iskustva. Ključni elementi modela su percepcija osobne sposobnosti i percepcija ishoda specifičnog ponašanja. Motiviran pozitivnim ishodima učenja nad očekivanim negativnim ishodima pojedinac će djelovati na promjenu stava i ponašanja.

Pojedinac koji mijenja svoje ponašanje prolazi kroz određene faze procesa promjene ponašanja, a o kojima govori teorija stupnjeva promjene ponašanja. Ona govori o fazi osvještavanja da problem postoji (prekontemplaciji), shvaćanju rizika i promišljanju o promjeni ponašanja (kontemplaciji), fazi pripreme gdje je pojedinac odlučio nešto poduzeti i uči o tome, izvođenju ponašanja koje pojedinac vrednuje pozitivno ili negativno i održavanje koje se odnosi na izvođenje novog usvojenog ponašanja u prikladnoj situaciji, a poruke trebaju pružati potkrepljenje i savjete kako održavati ponašanje kao što su pomoć s postavljenim ciljevima i prevladavanjem mogućih teškoća.

Model difuzije inovacija [4] opisuje kako se pojedina inovacija kreće u populaciji kroz vrijeme odnosno kojom brzinom će kada se pojavi neki novi proizvod ili ponašanje ljudi prihvatiti. Prema ovom modelu najbolji komunikacijski kanali za širenje novih informacija su tzv. voditelji mišljenja (*engl. opinion leaders*) i socijalne mreže vršnjaka. Ljudi će promijeniti svoje rizično ponašanje i prihvatiti zaštitno ponašanje ako percipiraju da bi mogli: patiti od negativnih i ozbiljnih zdravstvenih posljedica nastave li s takvim rizičnim ponašanjem, imaju koristi od takvog zdravlju usmjerenog ponašanja, smatraju da imaju resurse za kontrolu potencijalnih poteškoća i prepreka koje sa sobom nosi takvo ponašanje, ako su suočeni sa socijalnim pritiskom da izdrže u takvom ponašanju i ako su motivirani da udovolje tim pritiscima, te imaju informacije o riziku takvog ponašanja i dobitima od alternativnih ponašanja koja aktiviraju pozitivne afektivne odgovore i ako je promjena u ponašanju u skladu s pojedinačevim drugim ciljevima, vrijednostima i životnim projekcijama. Konačno, proces odlučivanja može biti pod utjecajem vanjskih i unutarnjih podražaja koji usmjeravaju pažnju pojedinca na rizike s kojima se suočava i na jednostavnost poduzimanja preventivne aktivnosti [5]. Prevenciju čine aktivnosti, programi ili političko djelovanje s ciljem stvaranja mogućnosti za zdrav i produktivan život, a kojima se i društvo potiče ka promociji zdravlja i mijenjanja onih uvjeta koji disponiraju pojedinca prema problemima [6].

3. DRUŠTVENI MARKETING I INTEGRIRANA MARKETING KOMUNIKACIJA

Marketing miksom u okviru društvenog marketinga nastoji se prvenstveno utjecati na stavove i motive pojedinaca kako bi se njihovom promjenom ostvario željeni cilj. Vrednovanje učinkovitosti društvenog marketinga odvija se u pravcu utvrđivanja smjera i intenziteta odvijanja društvenih promjena i njihove sukladnosti s postavljenim ciljevima društvenoga marketinga.

Koncept integriranih marketinških komunikacija uključuje koordiniranje svih marketinških komunikacijskih aktivnosti na način da se koriste kombinacije komunikacijskih elemenata s ciljem postizanja sinergijskih učinaka u kreiranju oglasa, analizi tržišta, korištenju medija i kontroli postignutih rezultata. U oblike integrirane tržišne komunikacije koji se proučavaju i primjenjuju ubrajaju se oglašavanje, osobna prodaja, unapređivanje prodaje, odnosi s javnošću, publicitet i izravna tržišna komunikacija. Pet je temeljnih obilježja integrirane tržišne komunikacije: utječe na ponašanje, počinje od potrošača ili potencijalnog kupca, koristi jedan ili sve oblike komunikacije, njome se postižu sinergijski učinci, cilj joj je izgraditi dugoročni odnos s kupcima [7].

Nositelji aktivnosti zaduženi za promoviranje zdravlja mogu utjecati na različite razine ponašanja u smislu formiranja mišljenja, promjenu stava ili utjecaj na promjene u mišljenjima i ponašanju. Pripadnost određenoj grupi ili promjene u stilu života utječu na promjene mišljenja pojedinca, njegova stava i promjene u ponašanju.

Utjecaji na promjenu stava odvijaju se utjecajem na kognitivnu komponentu stava putem izvora komunikacije i sadržaja poruke i na afektivnu (emocionalnu) komponentu. Stupanj emocionalne uključenosti pojačava se emocionalnim apelima koji se procesuiraju na općoj razini odnosno holističkim pristupom. Upravo osjećaji igraju ključnu ulogu u promjeni stavova u određenim situacijama. Uvjeravanje ima za cilj promjenu stava ili ponašanja kao rezultat djelovanja komunikacijskih apela na kognitivni ili afektivni dio potrošačeve svijesti. Teorijom procesa učenja objašnjavaju se upravo utjecaji uvjeravanja na ponašanje potrošača (korisnika usluga) [8].

Društveni marketing je disciplina kojom se unapređuje život u zajednici [9]. Društveni marketing podrazumijeva primjenu marketinga u procesu realizacije društvenih ciljeva koje kao temeljno ili pak izvedeno ishodište nemaju prvenstveno dobit, već zadovoljenje potreba koje imaju općedruštveni, odnosno socijalni karakter [10]. U konačnici cilj društvenog marketinga jest utjecaj na ponašanje i razvoj pojedinca i ciljnih skupina na ostvarenje za njih koristi, a koje su u svezi sa zdravljem, naobrazbom, općim društvenim blagostanjem i drugo.

Društvenim marketingom se može utjecati na svijest pojedinca da promjeni mišljenje koje je dovelo do neželjenog oblika ponašanja te da ga transformira u željeno ponašanje. Na mišljenje potencijalnog usvojitelja može se utjecati putem različitih tehnika i principa društvenog marketinga što bi rezultiralo stvaranjem mogućnosti da se formira takva društvena atmosfera koja bi poslužila kao dobar stimulans za stvaranje novih progresivnih ideja [11]. Društvenim marketingom se nastoji promijeniti ne uvjerenje u uvjerenje, odnosno promijeniti mišljenje, mišljenje u stav i stav u vrijednost što u konačnici treba rezultirati promjenom u ponašanju, odnosno usvajanjem određene prakse bilo da je riječ o uporabi materijalnog ili nematerijalnog proizvoda. Iz više je razloga to jedan od najtežih marketinških zadataka. Naposljetku od ljudi se traži: da se odreknu zadovoljstva, da im bude neugodno, da se odreknu estetike, promijene rutinu, da se odupru pritisku okoline, da potroše više vremena, da potroše više novca, da čuju loše vijesti, da uspostave nove navike, da se odreknu starih navika, da promijene udoban životni stil, riskiraju odbijanje, nauče novo umijeće i drugo. Pravi je problem i velika je razlika u tome što se ne može dati, pokazati ili obećati korisniku nešto opipljivo zauzvrat – pogotovo kratkoročno [12].

Uz prevenciju bolesti usko se vezuje pojam promoviranja zdravlja. Pojam prevencija bolesti označava sve postupke kojima se bolest sprečava, odnosno onemogućava. Prevencijom bolesti te unapređenjem i očuvanjem zdravlja bavi se posebna naučna medicinska disciplina, preventivna medicina. Cilj je preventivne medicine pravodobno prepoznavanje bolesti i provođenje liječenja kojim se sprečavaju smrt, invaliditet, oštećenja i smanjivanje kvaliteta života. Zajednički je cilj prevencije bolesti i promoviranje zdravlja očuvanje i unapređenje zdravlja, koje je vezano uz pozitivne ljudske i životne vrijednosti [13]. Preventivne aktivnosti jedan su od ciljeva definiranih u Strategiji razvoja zdravstva Republike Hrvatske definirane kroz programe ranog otkrivanja raka debelog crijeva, vrata maternice i raka dojke. Preventiva i rano otkrivanje bolesti jedna su od najuspješnijih metoda u borbi protiv malignih bolesti koje pridonose smanjenju broja oboljelih kao i smrtnosti. Putem integrirane marketing komunikacije potrebno je djelovati na svijest ciljanih skupina na što veći odaziv na preventivne preglede. Sam uspjeh persuazivne komunikacije ovisi o postojećim stavovima i utjecaju marketing

komunikacije na percepciju i prihvaćanje komunikacijskih sadržaja od strane primatelja poruke kao i raspoloženju u vrijeme prijema poruke i samoj osobnosti.

5. ZAKLJUČAK

Promocija zdravlja je dugotrajan i složen proces koji je integriran u koncept javnog zdravlja, a uključuje provedbu usvojenih politika i programa, monitoring, evaluaciju, razvoj i kampanje koje će djelovati na zajednicu i razvijati svjesnost o brizi za zdravlje. Posredstvom integrirane marketing komunikacije u promociji zdravstvenih akcija (kampanja) i isticanje pozitivnih potencijala (koristi) utječe se na širenje zdravstvenih poruka i na poticanje ljudi na provođenju određenih zdravstvenih zadataka koji omogućuju povećanu kontrolu nad čimbenicima koji uvjetuju zdravlje, promjenu stava u svezi brige za zdravlje i promjene ponašanja u stilu života. Za što bolje razumijevanje ciljne skupine i primjenu odgovarajućeg modela integrirane marketing komunikacije važno je razumjeti i teorije koje objašnjavaju određeno ponašanje.

Za što veći odaziv na nacionalne preventivne preglede u RH (rano otkrivanje raka dojke, raka vrata maternice i raka debelog crijeva) građane je potrebno motivirati, a u njihovoj motivaciji značajnu ulogu za sudjelovanje u preventivnim pregledima imaju liječnici obiteljske medicine i patronažna služba, mediji, plakati i promotivni materijali, medijski popraćena događanja povodom dana vezanih uz zdravlje, društvene mreže i dr.

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IMPROVING THE PRODUCT PROMOTION COMPLEX TRADE DEALER OF THE LLC “TRADEINS.RU”

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Abstract: *In modern conditions, Internet and software development tools and methods of promotion are constantly changing. There are new forms of providing services on the Internet, such as SaaS (software as a service), requiring a suitable promotion package and implementing an integrated approach to use the existing promotion tools.*

Ph. Kotler noted that the role of promotion lies in establishing communications by consumers. The Internet allows to implement a multi-directional communicative model enabling sellers and consumers to interact in such a way that the latter themselves become suppliers of the information about themselves and their needs.

A Russian company “Tradeins.ru” developing and supplying its software product TradeDealer to the auto market is not a leader, but it strives to keep the existing market share, increase it, as well as its competitiveness.

The advantages of the TradeDealer product include: constant upgrading the product software part, using modern technologies, supporting customers all day free, customizing the design or product software code to the client’s specific needs. The company’s products do not depend on customers’ computing power due to cloud calculations on their own servers. Besides, SaaS enables to reduce costs on advertising, exhibiting and maintaining media relations.

Having studied the peculiarities of SaaS products promotion, analyzed marketing activities of the company “Tradeins.ru”, consumers and competitors, one could point out the necessity of improving the product promotion complex TradeDealer and choosing the proper promotion tools.

Practical recommendations to LLC “Tradeins.ru” result in forming a new promotion complex, enabling the company promote its product effectively, getting a good market position, increasing company’s competitiveness and profits in terms of high environmental turbulence.

Keywords: *product promotion complex, consumer, software, market, competitiveness*

INTRODUCTION

Marketing is science and art aimed at choosing the target market properly, as well as attracting, maintaining and increasing the number of consumers through creating their confidence. Marketing is an active advertising activity. It is considered to be the architect of a consumer society, i.e. a market system where individuals are subjected to commercial exploitation by sellers. It is necessary for the market to create new needs continuously in order to sell more products.

Modern marketing is a complex phenomenon that should be considered as a combination of four basic factors of activity and constantly changing behavior parameters in market conditions:

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- marketing as a philosophy of interaction and coordination of business activities;
- marketing as a management concept;
- marketing as a means of providing advantages in the competitive environment;
- marketing as a method of finding solutions.

Thus, for increasing a market share and improving product promotion it's necessary for the company to win consumers, focus on competitors' activities, make a profit and use all the elements of the promotion complex in the company.

METHODOLOGY

A. Afonichkin notes that the concept of "product promotion" introduced by the American scholar N. Borden, is one of the four basic tools for the managing demand, and, therefore, marketing. This concept appeared in the 1960s in the USA, in the 1980s it came to Europe, and only in the 1990s it became known in Russian economic theory and practice. Nowadays this concept is widely spread in producing products [1].

Ph. Kotler specifies that product promotion implies a combination of different activities to bring information about the merits of products to potential consumers and stimulate their desires to buy them. The role of promotion is to establish communication with individuals, groups of people and organizations using direct and indirect advertising media, PR to sell the company's products. Thus, promotion is any form of communication or actions aimed at increasing awareness, reminding of the brand, product, company, etc. [2].

From the viewpoint of G. Bagiyev, sales promotion is a marketing activity stimulating sales growth. The main aim of sales promotion is to encourage casual purchases, regular customers (strengthening loyalty), attract new ones (switching demand, creating new loyalty) [1].

According to J. Burnet and S. Moriarty, "Personal selling is considered to be a direct presentation of a product or an idea to a potential customer by a company representative" The scientists emphasize the difference between personal selling and other marketing communications: personal sales use one-to-one communication, not mass communication, which is most often used in advertising, sales promotion and public relations. Personal sales are also different from direct marketing, which uses non-personal media [3].

J.-J. Lamben considers that direct marketing is an attribute of promotion tools. By direct marketing he implies a set of activities used by the company to build direct marketing communication personally with each consumer of their products and services. At the same time communications are two-sided: using direct marketing tools, the company may not only contact its customers directly, but also establish and receive an effective feedback on their proposals [4].

DISCUSSION AND RESULTS

The elements of the promotion complex today are increasingly moving to the Internet environment. The Internet develops communications, complements traditional means of communication with new ones, and allows to establish a two-way communication between the company and consumers.

The Internet has a multi-directional communicative model enabling sellers and consumers interact in such a way that the latter become suppliers of information about themselves and their needs.

Software as a service (SaaS) can be described as a software product managed by a SaaS provider, delivered via a regular Internet connection and used as a subscription service, usually via a web interface. The main criteria of a SaaS model are the following:

- software is used with the help of a web browser or a small client working on standard Internet protocol;
- software standard product is provided without any possibility of changing or customizing;
- there is no need to install additional software provision for usage;
- there is no need to carry out any major manipulations on integration and software installation;
- customers pay for using software, rather than license for it;
- unification of software installation for several customers.
- Among the main advantages of this product one should mention the following:
 - constant modernizing the software part of the product;
 - applying modern technologies,
 - providing free round-the-clock customer and technical support,
 - customizing the design or software code of the product to clients' specific needs.
 - being independent of customers' computing power, thanks to cloud computing on their own servers;
 - reducing costs for advertising, participating in exhibitions, working with media.

The transition from providing autonomous software to SaaS solutions have changed the approach to software marketing. Currently, this issue in publications is considered by various authors whose positions are extremely contradictory: there is no unanimity in understanding how to promote SaaS and whether it is necessary to do it.

Thus, J. Kaplan and S. Malaya pay attention to differences in promoting traditional software and SaaS. They offer an approach in which the decision to purchase SaaS depends totally on the buyer, i.e. the SaaS product promotes itself. [5], [6].

A. Domerg notes that while promoting SaaS, one must first focus on the value for the customer. [7] L. Kone emphasizes the simplicity of SaaS promoting, while P. Radigeski indicates that the promotion of SaaS is a very complex and expensive process. [8], [9].

SaaS can be considered from different viewpoints. To customers' minds, SaaS is regarded as software services outsourcing. To providers' minds, SaaS is the way of distributing and launching its software products.

SaaS promotion has a lot in common with classic software promotion models, e.g., SaaS providers need to avoid customers' outflow and invest money in communications with customers to maintain their loyalty to its products.

Software companies usually have rather high prices for their products, as in the final price includes the costs for brand creating, its advertising and promoting, building relationships with consumers. The Internet application may be a replacement of these traditional channels for SaaS providers influencing positively on pricing of the latter. [10], [11].

F. Chong and G. Carraro note that the Internet and direct sales are the main sales channels for SaaS, while D. Wibon also adds sales representatives, VAR (value-added reseller), i.e. a company that modifies / expands capabilities of an existing product (it creates value added) and then resells it (usually to final consumers) as a new product. [12], [10], [8].

One can say that the best way of promoting SaaS is direct marketing, especially in case of applying the Internet and marketing communications in the network. The most important indicator of the SaaS promotion performance is the customer acquisition cost. The total profit from the cooperation with the client and the outflow will be key indicators to identify customers' loyalty.

Consumer analysis of software products for auto business in the Russian market showed that online showcases are a fast-growing segment of the car sales market. [13]. Due to the tendency to import substitution and to the increase in the costs of foreign software products for customers (from 30 to 50% due to the depreciation of the ruble), the solution demand based on Russian software is growing.

This is especially true of automating and improving sales (this direction can provide an increase in online car sales, as well as reduce marketing costs for dealerships). Thus, the modernization of existing web applications and websites will continue, starting with optimization and completing with online sales systems, personal accounts and sales of services.

For successful development and promotion of software solutions, it is necessary to take into account the basic customers' values:

- innovative, constantly evolving software products;
- a wide range of services on a web platform;
- effective solutions proven by the market;
- the ability to serve web-platform maintenance and technical questions on outsourcing.

The company "Tradeins.ru", existing in the Russian market since 2010, creates software for thirty automobile holdings and more than 600 dealer centers throughout Russia. The main product of the company, SaaS-platform "TradeDealer" is an internal company work-out. The company provides integrated web products for car dealers, allowing car owners to buy a car, get insurance directly on the site, calculate a loan and trade-in, sign up for car maintenance. [14].

Nowadays, with the relevance of software products and the development of e-commerce, there are only a few software solutions for car dealers in the Russian Federation. The development of media technologies related to the promotion of cars in the Internet (video, virtual tours, 3D modeling), will result in increasing brand awareness "TradeDealer" in the B2B market for selling cars and improving the complex of the SaaS software product promotion.

CONCLUSION

The marketing analysis showed that there is a necessity to improve the existing complex of product (service) promotion of the company "Tradeins.ru". It implies:

- intensifying the efforts to develop a recognizable brand in the market;
- -increasing the value of created and distributed professional content in the cloud business, based on consumers' values;
- using NPS systems in the form of e-mail newsletters;

- concluding agreements with cloud service providers, hosting services, data centers to reduce computing power costs;
- negotiating with other companies to provide “TradeDealer” products for further cooperation.

The analysis of competitors of the “Tradeins.ru” (the LLC “CarOperator” - market leader, a division of “Cox Automotive”) showed that the “Tradeins.ru” meets specific needs of some market segments. In order to increase the competitiveness, the “Tradeins.ru” should do the following steps:

- using social media promotion;
- increasing the number of accounts;
- implementing content marketing;
- advertising technological advantages of the platform customized for the clients’ needs;
- increasing brand awareness.

The company will use the full range of promotion: advertising, PR, sales promotion, personal sales, direct marketing, realizing itself mainly in the Internet environment, taking part in exhibitions and creating content for specialized media. All elements of the complex will complement each other. It will allow the LLC “Tradeins.ru” to improve its communication policy, confidently gain a foothold in the market, which will result in increasing the company's competitiveness and profits in the high environmental turbulence.

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PROIZVOD NASPRAM BRENDA

PRODUCT VS BRAND

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Sadržaj: *Pojavom brendiranja kompanije su pronašle način kako da svoje proizvode predstavljaju potrošačima i zadobiju njihovo povjerenje. Brendiranjem, proizvod se pakuje u jednu konzistentnu cjelinu i reflektuje ono što kompanija hoće da predstavi potrošačima, pa tako brend postaje nevidljiva supstanca koja proizvod čini prepoznatljivim. Prvi dio rada se odnosi na teorijski pojam brenda, karakteristike i životni ciklus, a drugi na istraživanje procesa brendiranja, prikazujući na koji način se jedan proizvod brendira i koja je razlika između pojmova proizvod i brend.*

Ključne riječi: *proizvod, lojalnost, životni ciklus, brend, brendiranje*

Content: *With the emergence of branding the company has found a way to present their products to consumers and gain their trust. By branding, the product is packaged in a consistent whole and reflects what the company wants to present to consumers, making the brand an invisible substance that makes the product recognizable. The first part of the paper deals with the theoretical concept of the brand, its characteristics and the life cycle, and the second on the research of the branding process, showing how one product is branded and what is the difference between the terms: product and the brand.*

Keywords: *product, loyalty, life cycle, brand, branding*

UVOD

Za kompanije lojalnost potrošača određenom proizvodu ili usluzi je u savremenom poslovanju izuzetno značajna. Borba za potrošača je jedni način da se osvoji ciljno tržište, a alat koji služi za ostvarenje konkurentne prednosti na tržištu naziva se brend. Brendiranjem kompanije su pronašle način kako da svoje proizvode predstavljaju i budu prepoznatljive potrošačima. Brendiranje ima težnju ka emocionalnom identifikovanju sa potrošačima i poistovećivanje sa istima kroz vidljive i nevidljive djelove brenda. Iako mnoge kompanije sprovode brendiranje proizvoda, svi proizvodi nijesu i ne mogu biti brendovi. Prilikom brendiranja treba voditi računa da se svi elementi upakuju u jednu cjelinu koja reflektuje ono što kompanija hoće da predstavi potrošačima tj. ono što je i na koji način potrošačima potrebno.

Brend je neraskidivi dio proizvoda i usluge. To je nevidljiva supstanca koja proizvod odvaja od drugih istih ili sličnih proizvoda ono što ga čini prepoznatljivim. U radu je apostorifirana veza između proizvoda i brenda, kao i koje su sličnosti i razlike između ova dva pojma. U prvom

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dijelu rada su obuhvaćeni teorijski aspekti proizvoda i brenda, karakteristike proizvoda, proces i karakteristike brendiranja. U drugom dijelu rada kroz metod studije slučaja je pokazano kako jedan proizvod postaje brend i koje elemente i karakteristike mora da ima da bi postao brend.

1. TEORIJSKO POIMANJE PROIZVODA I BREND

1.1. POJAM I KARAKTERISTIKE PROIZVODA

Proces planiranja proizvoda započinje preciziranjem najpogodnijeg tržišta u zavisnosti od njegovih raspoloživih fizičkih, tehničkih, finansijskih i drugih resursa, a potom se istražuje tržište. [1] Proizvod je jedan od instrumenata marketing miksa preko koga preduzeće usklađuje svoje mogućnosti sa potrebama i zahtjevima potrošača. Nastaje kao rezultat napora svih zaposlenih u preduzeću da se odgovori zahtjevima i potrebama tržišta. Zadovoljavanjem potreba potrošača, preduzeće ostvaruje svoje ciljeve na tržištu. [2] Ono što treba naglasiti jeste da je kvalitetan proizvod opredeljujući, ali ne i dovoljan uslov za kreiranje i ostvarivanje uspeha na tržištu [3].

Pri kreiranju proizvoda, posebnu pažnju treba obratiti na dizajn, kvalitet i marku. Dizajn obuhvata sve karakteristike koje utiču na to kako proizvod izgleda, funkcioniše shodno zahtjevima kupca. Pojam kvaliteta proizvoda u sebi objedinjuje više obilježja proizvoda i to: trajnost, tačnost, pouzdanost, sigurnost upotrebe, lakoću rukovanja, funkcionalnost, upotrebu vrijednosti, a marka stvara vrijednosti za preduzeće kroz zadobijanje pažnje i povjerenja kupca, distributera i javnosti uopšte, zatim omogućava visok udio na tržištu i obezbjeđuje lojalnost kupaca. Uspješna marka omogućava visoku pozicioniranost proizvoda i stalno širenje tržišta. [1]

Razlika između brenda i proizvoda je upravo u tome što je proizvod opipljiv, dok je brend neopipljiv. Pored toga, brend ne bi mogao da funkcioniše bez proizvoda, odnosno brend je sastavni dio proizvoda. Proizvod je inicijalna ponuda za potrošača, dok je brend dugotrajan proces koji sadrži koninurano bavljenje odnosom proizvođač – proizvod- kupac. Brend predstavlja gradnju lojalnosti na obje strane, sa strane proizvođača i sa strane potrošača

1.2. BREND – POJAM, KARAKTERISTIKE I PROCES UPRAVLJANJA

Brend u prevodu znači marka, a u marketinškom smislu predstavlja prepoznatljivost proizvoda u svijesti potrošača. Definicija brenda od strane američke marketinške asocijacije (AMA) glasi: "Brend je ime, termin, znak, simbol, dizajn, ili kombinacija istih, usmjerena na identifikaciju proizvoda ili usluga nekog proizvođača ili grupe proizvođača i njihovo razlikovanje od proizvoda ili usluga konkurencije." [4]

Leslie de Chernatony i Malcolm McDonald navode da brend u sebi sadrži i: "prepoznatljiv proizvod, usluga, osoba ili mjesto, čija je vrijednost uvećana na način da je kupac ili korisnik opaža kao relevantnu, jedinstvenu, održivu dodatnu vrijednost, koja zadovoljava njegove potrebe na najbolji način". [5]

Prema jednom od najvećih gurua marketinga, Sethu Godinu, brend je „predstavlja način na koji potrošač vidi, opaža i razumije određeni markirani proizvod ili uslugu u svim njegovim dimenzijama”. [6]

David F. Alessandro (John Hanckok, CEO) je dao najsžetiju definiciju: „brend predstavlja sve ono na šta pomisli potrošač kada čuje ime neke kompanije. Sve predstavlja način rada, kontrolu kvaliteta, odnos prema okruženju, usluge potrošačima i svaku vijest koja se prenosi internetom”. [7]

Smisao brenda proizilazi od onoga što čovjek može čuti, vidjeti ili opipati. Osim samog proizvoda, brend izražava i kvalitet, način poslovanja i ukupnu komunikaciju kao i sveukupan odnos sa tržištem.

Da bi se kreirao jasan identitet jednog proizvoda, neophodno je razviti strukturu koja čine tri elementa brenda i to: ime, logo (znak) brenda i zaštitni znak [4]. Ovi elementi se kreiraju kroz niz uslova za izbor elemenata Brenda [8]: pamtljivost, značenje, dopadanje, prenosivost, prilagodljivost i mogućnost zakonske zaštite.

Kako bi brend zadovoljio sve kriterijume koji su postavljeni i kako bi sam proces brendiranja imao efekta potrebno je identifikovati brend kroz unutrašnji, spoljni i vremenski aspekt. Unutrašnji aspekt posmatranja brenda zasniva se na tome da kompanija bude prepoznatljiva, spoljni aspekt temelji se na pronalaženju načina da se ciljnim grupama približi vrijednost brenda, dok vremenski aspekt podrazumijeva stalno usavršavanje vizuelnog identiteta brenda.

Ono što proizvod nadograđuje do brenda tj. karakteristike koje treba da ima brend su sljedeće [4]:

- Brend ima fizičke elemente koji su bitni za razumijevanje i prepoznavanje
- Brend mora imati “dušu” i da šalje poruku kupcu
- Kultura brenda prenosi se i ima uticaj na svaki proizvod koji je pod određenim brendom
- Brendovi se razlikuju po odnosima sa klijentima
- Brend ima ulogu u kreiranju percepcije i imidža klijenata u okolini.

1.3. IZGRADNJA I POZICIONIRANJE BREND

Savremena literatura i praksa pokazuju da se brend stvara dugotrajnim i upornim radom na ponudi proizvoda kompanije. Nije svaki proizvod brend niti može biti. Planiranje i dugoročno ulaganje u proizvod, u sve vidljive i nevidljive elemente, predstavlja osnov za stvaranje brenda. Brend se, stvara, on se kreira, ali ako se ne njeguje može da se izgubi.

Snaga brenda krije se u četiri ključna elementa [9]: dominantnost brenda, protezanje brenda, pokrivenost brenda i lojalnost brendu.

Takođe, devedesetih godina se uvodi novi pojam koji se zove Arhitektura brenda. Ovaj koncept je povezan sa pristupom kompanije u kreiranju i upravljanju sopstvenim brend portfoliom – odlukama koje se odnose na broj brendova, njihovu ulogu i veze između njih. Aker, Kapferer i Keller detaljnije opisuju strategiju brend arhitekture kao „organizacionu strukturu portfolija brendova koja definiše broj i uloge brendova koje kompanija koristi za svoj asortiman proizvoda i ciljne grupe ili ciljna tržišta koja opslužuje “. Tako razlikujemo tri nivoa arhitekture brendova [10]:

- Korporativno brendiranje;
- Kombinovano brendiranje;
- Brendirani proizvodi/kuća brendova.

U procesu upravljanja brendom se definiše suština brenda – šta brend kaže, odnosno obećava. Pozicija brenda će biti uspješna ukoliko se odgovori na nekoliko pitanja [11]: Ko su ciljni potrošači? Ko su glavni konkurenti? U čemu je brend sličan sa konkurentima? U čemu se brend razlikuje od konkurenata?

U konačnom, brend je vrlo bitan i moćan instrument tržišne komunikacije. Predstavlja komunikacioni most između kompanije sa jedne strane i potrošača i tržišta sa druge strane.

2. CASE STUDY- BRENDIRANJE VODE “KAP”

2.1. BREND VODA “KAP”

Priča o vodi “KAP”¹⁴⁸ počinje usred netaknute prirode, u mjestu Gornje Morakovo (Crna Gora). Voda se crpi sa izvora “Bukovik” koji se nalazi na sjeverozapadnoj padini planine Miljevac, na nadmorskoj visini od 994mnm [12]. Ovo izvoriste predstavlja danas veoma rijetku pojavu potpuno netaknute prirode. Po svojim fizičko-hemijskim i mikrobiološkim karakteristikama, ova voda spada u vodu vrhunskog kvaliteta koja se, obzirom na nizak sadržaj natrijuma može piti u neograničenim količinama. Njemačka tehnologija flaširanja omogućava održavanje prirodnog sastava vode, pa se sa punim pravom može reći da „KAP“ voda pravo sa izvora dolazi do potrošača.

Misija kompanije ima za cilj da kroz kvalitet bude primijećena od strane potrošača, ostvari partnerstvo sa kupcima, nagradi svoje investitore i pomogne zajednici u kojoj posluje. **Vizija** je da brend “KAP” bude prepoznat i tražen na tržištu.

Vidljivi elementi brenda su:

- ime – “KAP”
- logotip čini *kapljica vode*, koja asocira na izvor života, čistoću i svježinu
- vizuelni izgled boce – plastična ambalaža sa omotom i karakterističnim logom i sloganom „KAP – svježina čiste prirode“

U **nevidljive elemente** spadaju vrijednosti koje brend afirmiše - zdrav život, uživanje i konzumiranje; uz formiranje stava potrošača da su napravili pravi izbor.

2.2. MARKETING MIKS - KAP

Brend arhitektura KAP portfolia sastoji se od sljedećih proizvoda:

- **KAP** - osnovni proizvod (negazirana prirodna voda sa niskim sadržajem rastvorivih minerala i niskim sadržajem natrijuma),
- **KAP Junior** – za djecu (prirodna mineralna vode sa ukusom jabuke od 250ml),
- **KAP Sport** - za sportiste (omogućava rehidraciju i nadoknađuje najvažnije utrošene sastojke).

Kvalitet brenda „KAP“ izražava se kroz: kvalitet sastava vode, usluge i procesa koji će u dužem vremenskom periodu stvarati vrijednost za potrošače; kvalitetan odnos sa partnerima i širom društvenom zajednicom.

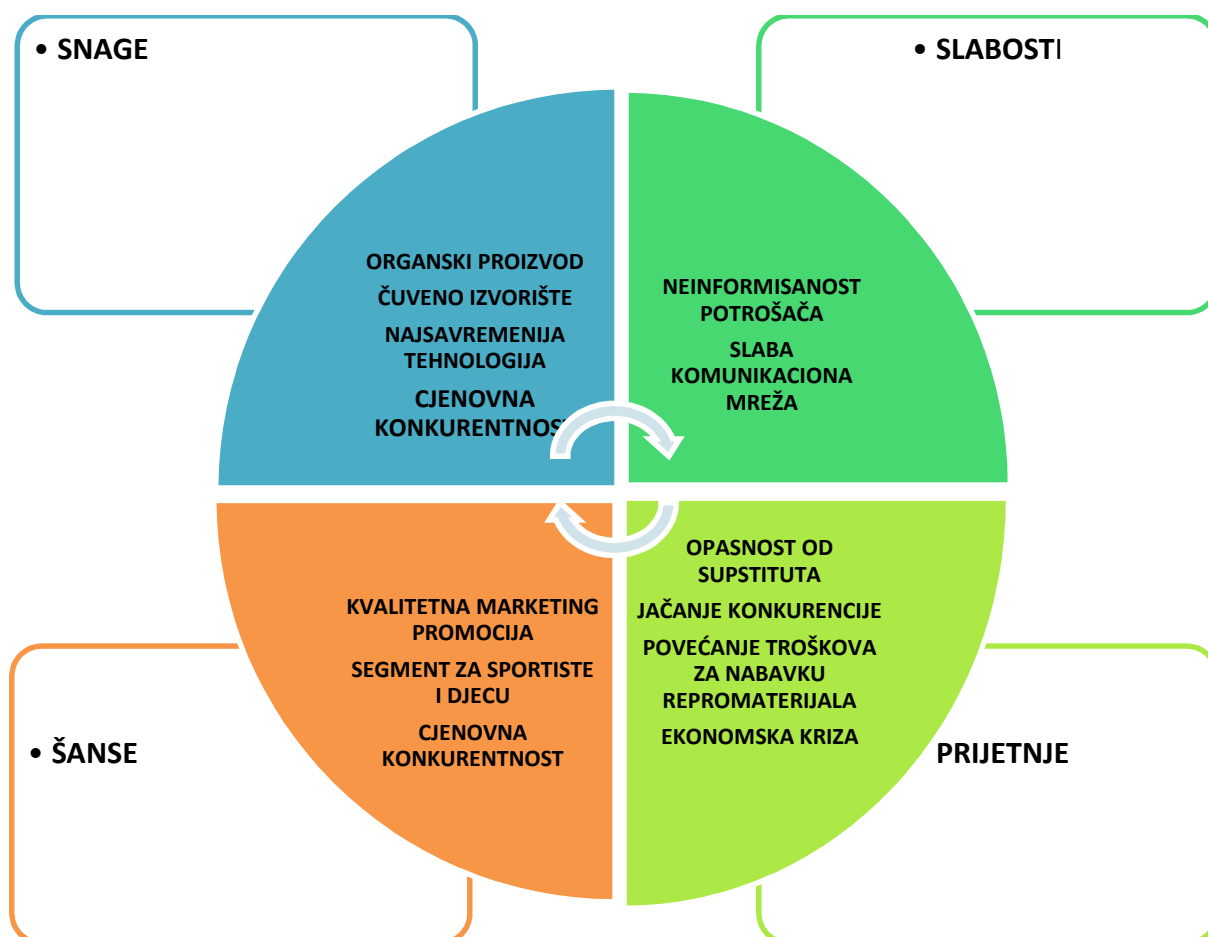
¹⁴⁸ Brendiranje ovog proizvoda je samostalna izrada autora rada

U crnogorskim prodavnicama flaširane vode koštaju od 30 centi do čak 1,5 eura. Jedan od ciljeva kompanije je da u narednih pet godina postigne najnižu cijenu flaširane vode u odnosu na prvih pet proizvođača po udjelu na tržištu.

Plasman kompanije “KAP“ će većim dijelom biti usmjeren na domaće tržište, a za početak se planira da 5 % od ukupne volumenske prodaje čini izvoz proizvoda u Srbiju, Hrvatsku i Bosnu i Hercegovinu. Učešće „domaćih voda“ na crnogorskom tržištu u ukupnoj potrošnji voda povećano je sa 34 na 41%, dok je uvoz opao za 10%.

Proces pozicioniranja brenda započinje segmentacijom tržišta, “KAP” je razvila proizvode za dva posebna ciljana segmenta – sportiste i djecu. O proizvodima “KAP” potrošači će se moći informisati u brošurama i štampanom informativnom materijalu, putem TV i radio stanica, novih vidova online komunikacije, kao i mobilne telefonije. Od BTL promotivnih aktivnosti naglasak je na ličnoj prodaji i promotivnim aktivnostima na mjestu prodaje.

Slika 1. SWOT analiza brenda vode KAP



Izvor: autori rada

Društveno odgovorno poslovanje je bitna karakteristika i dio brenda, pa kompanija KAP u tu svrhu vodi računa: da se obavljanje proizvodnih i drugih aktivnosti odvija u skladu sa zakonskim propisima o očuvanju životne sredine i vodnih resursa; kroz štednju resursa i energije; o zaštiti zdravlja i bezbjednosti zaposlenih; promovisanje zdravih stilova života i sponzorisane sportskih i kulturnih događaja koji te stilove života promovišu.

ZAKLJUČAK

S obzirom na brzinu i veličinu promjena koje se dešavaju na tržištu, brend bi trebalo da omogući potrošačima lakše donošenje odluka i smanjenje rizika prilikom kupovine. Ako proizvod ili usluga postanu brend, oni će češće biti okarakterisani kao kvalitetni i lakše će stvarati lojalne kupce. Savremeni potrošač je informisan i veoma zahtjevan. Da bi se ispunila njegova očekivanja potrebno je kreirati proizvod koji će ga zainteresovati i zadovoljiti njegova očekivanja, tako da brendiranje predstavlja put do lojalnog potrošača. Takođe, brendiranje ima važnu ulogu i za kompaniju. Ako kompanija ima brend i prepoznatljiva je na tržištu ona: lakše dolazi do dobavljača, lakše dolazi do izvora finansiranja, omogućava veću dostupnost proizvoda na tržištu, ima višu cijenu u odnosu na konkurente, lakše dolazi do kvalitetnih kadrova itd.

Na primjeru vode "KAP" prikazan je proces brendiranja i analiza za koju se očekuje da će dati određene rezultate. Iako je velika konkurencija na tržištu Crne Gore po pitanju mineralnih voda, autori smatraju da bi voda pronašla mjesto u potrošačkoj korpi jer bi bio prepoznat kvalitet koji ona nudi.

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MARKETING STRATEGY ON THE ENTRY OF SELECTED ENTERPRISE ON INTERNATIONAL MARKET

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***Summary:** A properly selected and successfully implemented marketing strategy is a key factor in the success of the company. With globalization and unified economic markets in the EU, companies have the opportunity to offer their products or services on foreign markets. Therefore, it is all the more important that the company is acquainted with general trends and trends of the foreign market. With this research, we wanted to show the strategy of marketing of a company on the foreign market from the aspect of the adapted marketing strategy to a particular market, within the specialized niche market - dental tourism. As a subset which deals specifically with dental tourism, we selected the company for the study. One of the markets where the mentioned clinic has its segment is also the Slovenian market. Since this market niche is present in Slovenia for a few years now and is in constant economic growth, we believe that this research will help to understand the role of marketing in promoting the company on the foreign market, which is especially important for health services. The aim is to give the contribution to the profession by written concrete proposals for choosing an appropriate marketing strategy for dental services on the foreign market.*

***Keywords:** marketing, marketing communications, strategy, target marketing, foreign market, dental tourism*

1. UVOD

Dentalni turizem je skupni pojem, ki zajema potovanja primarno motivirana z uporabo zobozdravstvenih storitev izven mesta bivanja. Kot fenomen, ki ga poznamo v današnji obliki, je nastal v zadnjih desetletjih. Povzročil je nastanek številnih zasebnih zobozdravstvenih poliklinik, posrednikov, agencij in drugih dejavnikov, ki se osredotočajo na ponujanje komercialnih zdravstvenih storitev. Za nastanek te zobozdravstvene veje je več vzrokov in dejavnikov: visoki stroški zdravstvenega zavarovanja izven sistema javnega zdravstva v razvitih zahodnih državah, težje dostopne, ali celo nedostopne nekatere zdravstvene storitve preko sistema javnega zdravstva, visoke premije zavarovanja, poenostavljenost in nižje cene za mednarodna potovanja, hitrejši razvoj zobozdravstvene tehnologije in standardov storitev. Razlogi in motivacije posameznikov za odločitev na tovrstna potovanja se razlikujejo, vendar se jih načeloma lahko razvrsti v več glavnih kategorij - kategorijo cen, povpraševanje po storitvah višje kakovosti od tistih, ki so na voljo na domačem trgu, povpraševanje po storitvah, ki niso na voljo na domačem trgu in časovno kategorijo (pridobitev zobozdravstvenih storitev v najkrajšem možnem času). Dentalni turizem obsega širok spekter storitev in lahko združuje več dejavnosti (prosti čas, zabava, sprostitve, wellness ipd.) hkrati z zobozdravstveno storitvijo, ki je na koncu vseeno najpomembnejši motiv potovanja.

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Večje število potovanj v zdravstvene namene je spodbudilo posamezne države, da vlagajo več v zdravstveno infrastrukturo, wellness centre, zdravstvena svetovanja in enostavnejše vizumske postopke. Oglaševanje vodilnih zobozdravstvenih poliklinik na mednarodnem trgu je postalo nekaj povsem običajnega, bodisi neposredno, bodisi preko posrednikov, ki ustvarjajo posebne programe in združujejo zdravstvene in turistične storitve.

Z uspešnim poslovanjem podjetja na tujem trgu je povezanih več dejavnikov. Eden najpomembnejših je zagotovo uspešna strategija trženja, ki zajema vse od predstavitve vizije in ciljev podjetja vsem potrošnikom do integriranega marketinškega komuniciranja ciljni skupini potrošnikov. Podjetje mora pred vstopom na tuji trg kritično presoditi motive za prodajo na tujih trgih, svoj lastni potencial, ovrednotiti temeljne kriterije presoje za prodajo na tujih trgih in predvsem oceniti svojo sposobnost obdržati korak z vsemi izzivi, ki jih prinaša tuje okolje (Ileršič, 2010, str. 44). Strategija trženja je povezana z aktivnostmi trženja in odločitvami, ki jih podjetje sprejema z namenom ustvarjanja in ohranjanja konkurenčnih prednosti (Day, 1990). Tudi drugi avtorji navajajo, da je bistvo strategije trženja v zadovoljevanju potreb ciljnih uporabnikov na boljši način, kot to dela konkurenca (Jobber, 2010). Vukasović in Jagodič navajata, da je bistvo strategije trženja "biti boljši in drugačen od konkurentov po mnenju ciljnih skupin in to pri tistih značilnostih, ki so za ciljno skupino pomembne" (Vukasović in Jagodič, 2017, str. 185). Strategija trženja je najpomembnejši sestavni del strategije podjetja, saj pomeni ustvarjanje dolgoročne prednosti na trgu pred konkurenco, pridobivanje novih uporabnikov in/ali trgov, ustvarjanje pozitivne podobe podjetja in doseganje načrtovanega dobička.

Izbrano podjetje si prizadeva biti vodilna zobozdravstvena poliklinika v dentalnem turizmu, zato potrebuje dobro in skrbno načrtovano strategijo za razvoj in trženje lastne blagovne znamke na mednarodnih trgih. Ker je fokus raziskave strategija trženja na slovenskem trgu, bomo v nadaljevanju prikazali, kako je izbrano podjetje izbralo strategijo trženja in tržno komunikacijo s ciljno skupino ob vstopu na slovenski trg.

2. REZULTATI RAZISKAVE

2.1 Metodologija in vzorec raziskave

V raziskavi smo uporabili kvalitativno raziskovalno metodo. Opravili smo 5 razgovorov (intervjujev) z vodstvom podjetja. Izbira intervjuvancev je bila opravljena na podlagi njihove vloge pri opredeljevanju in doseganju ciljev trženja in oblikovanju strategije trženja. Intervjuji so bili izvedeni na sedežu izbranega podjetja, in sicer v obdobju od 22.5. do 27.6.2018. Vseh pet intervjujev sestavljajo vprašanja odprtega tipa.

2.3 Analiza intervjujev

Zaradi prostorske omejitve članka v nadaljevanju povzemamo ključne ugotovitve treh intervjujev. Rezultati celotne raziskave so objavljeni v magistrski nalogi avtorja Filipan (2018).

Iz intervjuja z *vodjo prodaje* smo izvedeli, da se z oddelkom za trženje opredeljujejo trženjski cilji in roki za doseg le teh, oddelek prodaje pa nato raziskuje in analizira prodajne učinke in procese in poskuša iti v korak z vizijo oddelka za trženje. Ker narava dela zahteva različen pristop do posameznikov, se skladno s tem spreminjajo tudi prodajni postopki, od znanja, veščin in ustreznega pristopa zaposlenih v prodaji do potencialnega pacienta pa je v veliki meri odvisna uspešnost dela oziroma pridobitev novih pacientov. Prodajalcu storitev je ob formalnem in cehovskem znanju potrebno tudi znanje s področja psihologije, saj mora »prodreti« do

uporabnika in ga uspeti prepričati, da pride na pregled prav v to polikliniko. Medsebojna pomoč in prenos znanja med sodelavci in oddelki privede do večjih uspehov in boljših rezultatov. Zelo pomembne so povratne informacije, saj je brez njih težko izboljševati in prilagajati prodajne procese, kakor tudi zobozdravstvene storitve, ki jih uporabniki pričakujejo. Prodajni proces se spremlja od začetka (prvega klica uporabnika) do konca (povratna informacija uporabnika). Pozitivna povratna informacija pacienta, ki je v polikliniki zaključil zdravljenje, je hkrati potrditev dobrega dela zaposlenih v prodajnem oddelku.

Vodji trženja v izbranem podjetju je povratna informacija, še posebej prodajnega oddelka, ki je v neposrednem stiku s pacienti, zelo pomembna. Prav te informacije so v pomoč pri oblikovanju nadaljnjih trženjskih ciljev in načrtov strategije trženja za njihovo realizacijo. Strategija trženja se opredeljuje v naprej, podjetje pa mora biti fleksibilno in prilagodljivo ter pripravljeno na vse morebitne spremembe. Vnovič je poudaril, da je omenjena poliklinika individualno usmerjena k vsakemu pacientu posebej in da je zelo pomemben del opravljanja dela prodajnega tima pogovor s pacienti ter poslušanje njihovih potreb, želja in videnja rešitve njihovih težav.

Ravnatelj poliklinike kot glavno strategijo trženja omenja ustvaritev svojevrstne blagovne znamke, ki bo prepoznavna na mednarodnih trgih. Tudi on poudarja agendo, ki jih vodi, in sicer vrhunsko kakovost in individualno skrb za vsakega njihovega pacienta. Navaja, da jih konkurenca motivira za vedno nove prijeme, nenehno raziskovanje in spremljanje tokov v zobozdravstvenem turizmu, izpopolnjevanje in ponudbo dodane vrednosti. Za prepoznavnost na trgu uporabljajo oglaševanje preko različnih medijev, obstajati pa morajo tudi globalno na spletu, tako da so spletna orodja komunikacije, od družabnih omrežij do navadnih spletnih strani, tista, s katerimi se potencialni uporabniki najprej srečajo. Veliko jim pomenijo priporočila po družabnih omrežjih, saj se preko njih z njihovimi storitvami seznanja veliko število ljudi. Z vsako strategijo, tako prodajno kot trženjsko, se trudijo biti korak naprej, kar velja tudi za spletno in neposredno trženje, ki mu posvečajo veliko pozornost.

2.4 Odgovori na raziskovalna vprašanja

Po obdelavi podatkov iz dostopnih gradiv, lahko zaključimo, da smo odgovorili na prvo raziskovalno vprašanje "Kako je izbrano podjetje izbralo ustrezno strategijo trženja?". Izbrano podjetje je izbralo ustrezno strategijo trženja na podlagi jasno definiranih ciljev trženja, ki jih je predhodno opredelilo vodstvo podjetja ter na podlagi različnih strateških analiz in orodij. To je potrdil tudi sam lastnik in direktor izbranega podjetja v intervjuju, saj je dejal, da mu je pri oblikovanju strategije za vstop na tuje trge pomagal sedanji direktor marketinga. Strategija je bila oblikovana na podlagi različnih strateških analiz in orodij kot so MOF, RECoIL, PEST-LE, SWOT, BCG matrike, Porterjevega modela petih sil in Ansoffove matrike. Vsa omenjena orodja dajejo vpogled v poslovanje podjetja in skupaj dajejo celotno sliko kako "zdravo" podjetje sluje.

Na drugo raziskovalno vprašanje, "Kakšne so glavne značilnosti slovenskih uporabnikov kot pacientov v zobozdravstveni niši?", smo prav tako dobili odgovor. Intervjuvanci so v svojih odgovorih nakazali na kar nekaj značilnosti slovenskih uporabnikov. Njihovo skupno mnenje o slovenskih pacientih je pozitivno (sodelovanje z zobozdravnikom pri odpravljanju zobozdravstvenih težav, pripravljenost na večje zobozdravstvene posege, točno vedo, kaj želijo in izjemno jim je pomembna kakovost materialov in storitev). Zaradi tega predstavlja za izbrano podjetje slovenski trg enega od najzanimivejših tujih trgov, na katerem je poliklinika aktivna.

Po podrobnejši analizi podatkov pridobljenih iz dostopnih internih gradiv, javno objavljenih finančnih poročil, intervjujev in preštudirane literature, ki je na voljo, lahko na zadnje zastavljeno raziskovalno vprašanje "S kakšno strategijo trženja je izbrano podjetje vstopilo na slovenski trg?" odgovorimo: z individualno strategijo trženja. Izbrano podjetje je vstopilo na slovenski trg ob predhodni podrobni analizi trga in tržnega položaja konkurence, tržnega položaja poliklinike, analize tržne pozicije izdelkov/storitev in analize uporabnikov. Zaznali so prednosti individualnega trženja, zato so temu ustrezno prilagodili strategijo trženja. Gre predvsem za vzpostavljanje interaktivnega in dolgoročnega odnosa s potencialnimi uporabniki, in sicer tako, da se uporabniku ponujajo tudi dodatne storitve kot so brezplačna namestitvev in prevoz ter ponudba dodatnih informacij, ki so lahko tudi izven domene dentalne poliklinike. Izbrano podjetje se je odločilo za neposredne tržne poti do svojih ciljnih uporabnikov. Prodajni oddelek vzpostavlja prve kontakte s pacienti, vodi korespondenco z interesenti ali obstoječimi pacienti, ponuja informacije, vodi evidenco o pacientih ter organizira termine za zobozdravstvene posege. Kot sredstva komunikacije uporablja telefone, elektronsko pošto, vzpostavitev osebnih stikov s pomočjo spletnih orodij (klepet, Facebook idr.). Razen neposrednih tržnih poti, uporablja tudi posredne poti, preko e-posrednikov. Facebook je največji in najpomembnejši komunikacijski kanal izbranega podjetja. Največ interesentov kontaktira polikliniko preko Facebook strani, manjši delež preko drugih spletnih strani ali oglasov, najmanj pa preko neposrednega fizičnega oglaševanja, kot so npr. sejmi. Vendar sejmi kljub vsemu ostajajo najbolj dragoceno orodje za pozicioniranje in krepitev blagovne znamke. Razen Facebooka uporablja poliklinika tudi Googleovo stran za oglaševanje imenovano Google Ads, ki omogoča iste funkcije kot Facebook, vendar preko oglasnih pasic, ki se pojavljajo na različnih spletnih straneh. Na ta način lahko podjetja usmerijo oglaševanje na ciljno skupino, ne glede na to, katero spletno stran posameznik iz te ciljne skupine pregleduje. Uradna Facebook stran je pomembna tudi zaradi ustvarjanja privržencev izbranega podjetja kot blagovne znamke. Na ta način se poskuša pridobiti zvestobo pacientov, ki bodo odpravljali zobozdravstvene težave v tej polikliniki tudi v prihodnje in ne samo enkrat. Izbrano podjetje je uspelo najti način, kako biti nekoliko drugačno, informacija o kakovostno opravljenih storitvah pri njih, v katero imajo potencialni pacienti še vedno največ zaupanja, pa se širi z WOM- word of mouth - komunikacijo. Glede na vse večjo prepoznavnost izbranega podjetja kot kakovostne blagovne znamke, lahko trdimo, da je izbrano podjetje dobro sprejeto na slovenskem trgu.

ZAKLJUČEK

V članku smo prikazali strategijo trženja podjetja na tujem trgu z vidika prilagojene strategije trženja določenemu trgu, znotraj specializirane tržne niše – dentalnega turizma. Izbranemu podjetju lahko ugotovitve in spoznanja iz te raziskave služijo kot osnova za usmeritev nadaljnjih aktivnosti, potrebnih sprememb in izboljšav pri trženju in utrjevanju konkurenčnega položaja na mednarodnem trgu. Izbrano podjetje ima jasno razvito in določeno strategijo trženja na slovenskem trgu. Ta je odvisna od samih zaposlenih in njihove izvedbe strateških načrtov in privrženosti k uspešnosti podjetja. Eno od priporočil, ki ga lahko damo na podlagi ugotovljenega in analiziranega, je vsekakor večja in boljša komunikacija med samimi oddelki. Iz samih intervjujev je sicer razvidna dobra povezanost oddelka za marketing z ostalimi oddelki, vendar tega ni moč zatrditi za medsebojne odnose med drugimi oddelki. Naše naslednje priporočilo bi bilo, da naj poliklinika kot vzpenjajoče se podjetje »napade« vodilne konkurenčne poliklinike s strategijo boljših storitev. S takšno strategijo bi izbrano podjetje ponudilo slovenskim uporabnikom boljše storitve od konkurence. Podjetje je na pravi poti z individualno strategijo trženja, vendar menimo, da jo je potrebno še dodatno razširiti. Naslednje priporočilo bi bilo ustvarjanje večje tržne prisotnosti s pomočjo radijskih oglasov, oglasov v časopisih in revijah namenjenih zdravju, oziroma publikacijah, ki so namenjene osebam v

tretjem življenjskem obdobju. Spletno oglaševanje je res v večini primerov najboljši način oglaševanja, vendar se podjetje mora zavedati, da so njegova ciljna skupina uporabnikov starejši ljudje, ki v večini niso prisotni na spletu in ga ne uporabljajo, zaradi česar trenutno spletno tržno komuniciranje do njih ne prispe. Konkurenca se očitno tega zaveda, zato jo najdemo pogosteje od analiziranega podjetja, kako se promovira v klasičnih medijih.

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ESENCIJALNI ZNAČAJ MARKETING MENADŽMENTA U KREIRANJUSPORTSKO REKREATIVNOG TURIZMA U SRBIJI

THE ESSENTIAL IMPORTANCE OF MARKETING MANAGEMENT IN THE CREATION OF SPORTS AND RECREATIONAL TOURISM IN SERBIA

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Apstrakt: *U radu se analiziraju i istražuju relevantni aspekti organizovanja i upravljanja sportsko rekreativnim turizmom u Srbiji, kao relativno nova forma aktivnog odmora. Naime, turisti kao “razmažena” kategorija putnika, sve više očekuju dodatne aktivnosti i usluge, kako bi zadovoljili narasle potrebe i očekivanja. Standardni, uobičajeni aranžmani uskoro će postati prošlost, jer narasla, oštra konkurencija sprovodi selekciju. Novi turisti zahtevaju više i spremni su da to dodatno plate. Samim tim, uloga marketing menadžmenta postaje gotovo presudna.*

Ključne reči: *sportsko rekreativni turizam, marketing menadžment, stres, aktivan odmor.*

Abstarct: *This paper analyzes and explores the relevant aspects of organization and management of sports and recreational tourism in Serbia, as a relatively new form of active vacation. Namely, tourists as a “spoiled” category of travelers are increasingly expecting additional activities and services in order to meet the growing needs and expectations. Standard, customary arrangements will soon become a past, because it has grown, a sharp competition is conducted by selection. New tourists demand more and are willing to pay more. Therefore, the role of marketing management is becoming increasingly crucial.*

Keywords: *sports and recreational tourism, marketing management, stress, active vacation.*

1. U V O D

Danas u svetu postoji oko 230 sportova koje je čovečanstvo izumelo [1, str.4.] Sport se i dalje razvija, grana, deli, napreduje, pun je strasti, uzbuđenja, “kipi” od zdravlja, ali ponekad izaziva očajanje i tugu. Na svetskoj sportskoj i turističkoj pozornici – rekreativni sport je već zauzeo odlične pozicije. Što se tiče tržišta Srbije nekako stidljivo, iskrsavaju nove forme i trendovi u delu sportskog turizma. Stručnjaci su uvideli da postojeća diverzifikacija turističke ponude Srbije, zasigurno može i dalje da se širi. Radi se o sportsko rekreativnom turizmu.

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2. OSNOVE SPORTSKO REKREATIVNOG TURIZMA

Sportsko rekreativni turizam pripada posebnom obliku turizma, koji ne mora u startu da bude takmičarskog karaktera, već to zavisi od idejnog koncepta organizatora ili zahteva samih učesnika. Ujedno, može da se nesmetano implementira tokom cele godine, kako u letnjim, tako i u zimskim mesecima. Čak, uloge posmatrača, navijača, pomoćnika organizatora, i mnogobrojne druge, imaju svoju sportsku, zdravstvenu i edukativnu svrhu.

Shodno aktuelnom Zakonu o sportu Republike Srbije iz 2016. godine, piše: „Sportska rekreacija (rekreativni sport, sport za sve, masovni sport) jeste oblast sporta koja obuhvata dobrovoljno bavljenje fizičkim vežbanjem, odnosno sportskim aktivnostima radi odmora, osveženja, zabave, unapređivanja zdravlja ili unapređivanja sopstvenih rezultata i radi zadovoljenja potreba za kretanjem, igrom i druženjem, u svim segmentima stanovništva.”[2, član 3, stav 3.] Autor Lj. Jovan sportsku rekreaciju definiše kao slobodnu i organizovanu aktivnost koja fizički, psihički i socijalno obogaćuje, relaksira i obnavlja čoveka, te mu pomaže da se oblikuje u svestrano razvijenu ličnost. [3] Isto tako, globalni portal „Sport tourism expo“ apostrofira rekreaciju kao aktivan odmor, sa kojom čovek obnavlja radom utrošenu psihofizičku energiju i uspostavlja urušenu ravnotežu. Rekreacija je slobodna i organizovana aktivnost koja fizički, psihički i socijalno obogaćuje, oslobađa i obnavlja čoveka i pomaže mu da se oblikuje u svestrano razvijenu ličnost”. [4]

Kritična uloga stručnjaka iz sfere marketinga je da jasno i konstruktivno promovišu zdrave, napredne životne stilove. Upravo, sportsko rekreativna aktivnost je primaran fokus marketinških aktivnosti. Naime, svojom opštom ulogom sport podstiče razvoj društveno odgovornog ponašanja kroz više aspekata. Na primer, uloga sporta u pravilnom razvoju mladih ljudi, ili u poboljšanju zdravlja svih generacija, predstavlja pozitivan uticaj. Ili, sport u cilju promocije društveno odgovornog ponašanja, kroz integraciju marginalizovanih članova društva, predstavlja takođe značajan potencijal. Sve navedeno podrazumeva korišćenje promocije i marketinških aktivnosti u realizaciji sportsko rekreativnog turizma, ali i drugih načina primene sporta.

Svakako, kada govorimo o sportsko rekreativnom turizmu, pored suštinskih doprinosa sporta govorimo i o mogućnostima sticanja profita. U ovim aktivnostima je uloga marketinga i promocije ključna, kako kroz predstavljanje prednosti ponude, tako i kroz aktivnosti istraživanja, segmentacije i pozicioniranja. Uspešna promocija utiče na stvaranje dobrog imidža i jačanje konkurentske pozicije.” [5, p.361-371] Primena marketinških instrumenata u sportsko rekreativnom turizmu je osnovni uslov uspeha realizacije sporta u cilju:

- Približavanja sporta ljudima isticanjem njegovih mogućnosti u periodima kada želimo aktivan odmor;
- Ostvarenja profita učesnika na tržištu turističkih usluga kroz diferencijaciju i određeni stepen inovacija ponude zasnovanih na ponudi sportskim sadržaja;
- Promocije sporta kao područja društveno odgovornog ponašanja.

Uzročno posledična veza između navedenih ključnih segmenata ovog tržišta evidentna je kroz odnos sporta, turizma, profita, društveno odgovornog ponašanja, marketinga i promocije. Posebno je široka tema primene sporta u cilju širenja društveno odgovorne svesti [6. str. 303.] Iz navedenog je očigledna kompleksnost i širina ovog područja, te ćemo se u nastavku usmeriti samo kao osnovnim aspektima primene marketinga u sportsko rekreativnom turizmu.

3. POTENCIJALI SPORTA U TURIZMU SA ASPEKTA KORISNIKA

3.1 SNAGA AKTIVNOG ODMORA

Turistički potencijali Srbije vidljivi su na planinama, posebno u nacionalnim parkovima, zatim jezerima, rekama, u banjama i klimatskim mestima, selima (kao seoski turizam), manastirima, kao i na mnogim drugim mestima. Turistički aduti sa posebnim naglaskom su gradovi koji se ponose svojom kulturom, istorijom, arhitekturom i drugim znamenitostima. Ipak, aktivan odmor u prirodi sve je vidljiviji i stiže svoje poklonike širih masa – kako mladih, tako i starijih. Da bi se sportsko rekreativni programi delotvorno osmislili i stručno sprovedi u praksi, očito je da su potrebni istinski profesionalci struke, a posebno oni iz oblasti marketinga. Zasigurno, značaj marketing menadžmenta je ključan.

Očito je da za sportsko rekreativne aktivnosti raste tražnja. Upravo ove aktivnosti pokreću aktivan odmor u turizmu, jer danas turisti sve češće žele boravak u prirodi, takmičenje i pustolovinu. Više nije IN ležati na plaži, listati neki časopis i pržiti se na suncu. Posebno u pred sezoni i post sezoni sve je interesantniji aktivan (sportski) odmor. Aktivan turistički plan je važan potencijal za brojne organizatore putovanja i odmora, bilo da se radi o planinarenju, trekingu, raftingu, speleologiji, ronjenju, posmatranju ptica, biciklizamu, jahanju konja, skijanju, trčanju, kanjoningu, džip safariju. Spoj dobre organizacije, menadžmenta i marketinga sa navedenim sportovima, stvara nove mogućnosti za turiste.

Vidovi aktivnog turizma u Srbiji imaju šansu da se kontinuirano razvijaju i šire. Saradnja sa turističkim organizacijama može da postane plodotvorna. Na primer, nacionalni parkovi Srbije (Kopaonik, Fruška gora, Šar planina, Tara i Đerdap), su inspirativne, prelepe destinacije koje poseduju prilično mogućnosti za aktivan turizam, sportsku rekreaciju ili vrhunski doživljaj, sa dodacima prikladnog adrenalina.

Inače, vodeći globalni analitičari predviđaju da će sportski turizam preuzeti prednost u turističkoj industriji u sferi putovanja i aktivnog odmora (posebno sa mogućnostima vezanim za golf, tenis, avanturu i druge trendove kod potreba potrošača). Sportski turizam trenutno pridonosi iznenađujućim 14% učešća od ukupnih prihoda od putovanja i turizma, i predviđa seda će tokom sledeće decenije eksponencijalno porasti. [4]

Posebno uzbudljiv, a u izvesnim domenima sve više prisutan u Srbiji, kao avanturistički sport, je splavarenje (rafting). Na nemirnim, brzim rekama, relativno mala posada nastoji da iskontroliše splav na naduvavanje ili da ukroti brze rečne struje. Ljudi nastoje da uživaju u predelima, da se druže, fotografišu predele, da se takmiče - kroz koje reka teče. Popularnost splavarenja u Srbiji iz godine u godinu raste. Postoje reke mirnijeg toka, kao i ekstremnih voda, što stvara potencijal za različite segmente turističkih potreba. Posebno reke Tara, Lim i Drina su zahvalne za “uživanciju”.

Na primer, splavarenje na reci Lim učesnicima pruža vrhunski, nesvakidašnji doživljaj, uzbuđenje i dodatni nivo adrenalina. Upravo se tu radi o aktivnom turizmu koji predstavlja sportsko rekreativni potencijal za dalji rast. Drugim rečima, aktivan turizam sa fokusom na sport, predstavlja aktivan odmor koji uključuje sva čula. Samim tim, organizatori splavarenja i raftinga moraju da iznalaze turističke marketinške kanale kako bi zainteresovali i privlačili učesnike, odnosno turiste. Svakako da aktivan odmor kao budućnost turizma podrazumeva seriozan i kredibilan pristup sa elementima integrisane marketing komunikacije.

3.2 UTICAJ STRESA NA KVALITET ŽIVOTA I POTENCIJALI SPORTKOG TURIZMA

Generalno, stres je postao sinonim za život čoveka danas, jer negativno deluje na zdravlje. Utiče rizično na kvalitet života, na produktivnost na poslu, na slabost mišića, promenu raspoloženja i na razaranje vitalnih organa. Pored stresa, poželjno je ukazati ina stanja kao što su usamljenost, žalost, napetost i apatija. Ova stanja takođe negativno deluju na čoveka.

Postoje mnogi okidači stresa posebno u vidu određenih problema i nezadovoljstva na poslu ili u braku, zatim depresija, nervoza, emocionalni faktori šireg spektra, i još mnogo toga. Čovek bi morao da pronađe prirodne ventile opuštanja, da ponekad zastane, razmisli i prihvati zdrave navike života, koje se ogledaju u pešačenju, u boravku u prirodi i bavljenju sportom (rekreativno, ili profesionalno). Svakako, tu su i turistička putovanja. Jednom rečju – aktivan odmor. Naime, naučno je potvrđeno da boravak u prirodi i sportska rekreacija zamašno “utišavaju” stres. Zdrav pristup životu – u vidu kontinuiranih pešačenja na obodima gradova, vežbanja, druženja sa prijateljima, pozitivno razmišljanje, zdrava ishrana i bavljenje sportom, delotvorno je za stvaranje zdrave populacije.

Jedan od primera značaja uticaja sporta na zdravlje postoji u Škotskoj. Naime, u ovoj zemlji, od meseca oktobra 2018. godine, zdravstvene ustanove svojim pacijentima kao “lek” mogu da prepisu - šetnju u prirodi. Radi se o prvom programu ove vrste u Ujedinjenom Kraljevstvu, a cilj je smanjiti krvni pritisak, anksioznost i povećati sreću kod ljudi sa dijabetesom, mentalnim bolestima, stresom, bolestima srca i drugim bolestima.” [7, str. 35]

U svakom slučaju, aktivan život, kretanje, sportska rekreacija ili bilo koja osmišljena i preporučena fizička aktivnost je plodotvorna i pravi je melem za telo i dušu. Upravo, inicijator aktivnog odmora u turizmu je sportska rekreacija. Aktivan odmor objedinjuje psihofizičku aktivnost čoveka tako što ga opušta, stvara unutrašnji balans, čuva mentalnu bistrinu. Pasivan odmor podrazumeva da čovek miruje, odnosno sedi ili leži i to je poželjno nakon većih fizičkih aktivnosti, odnosno naprezanja.

Značajan broj zaposlenih u organizacijama privrednog, ili neprivrednog spektra delatnosti u Srbiji, svoj posao uglavnom odrađuju sedeći, vrlo često za kompjuterom i u nepravilnom položaju tela, što na dugi rok predstavlja istinsku opasnost po zdravlje ljudi. A kada krenu na zaslužene odmore, usled duže fizičke neaktivnosti i napornog intelektualnog rada, javlja se potreba za kretanjem, za aktivnim boravkom u prirodnom ambijentu, kao i za nekim prikladnim sportskim aktivnostima. Sportsko rekreativni turizam, sa pravilnim marketinškim pristupom, može odgovoriti na potrebe ovog velikog segmenta populacije. U marketinškim strategijama ovog područja tržišta, a u odnosu na navedeni segment turista, promociju i komunikaciju treba bazirati na isticanju razloga za bavljenje sportsko rekreativnim aktivnostima, i to u pravcu poboljšanja psihofizičkog stanja čoveka.

3.3 MLADI I SPORTSKA REKREACIJA

Mladi u Srbiji su, opšte posmatrajući, pasivni i uglavnom koriste životne stilove koji premalo obuhvataju fizičku aktivnost i zdrav odnos prema sportu. Zadovoljavajući se površnim aspektima svakodnevnog bitisanja usled nedostatka motivacije i informacija, mladi se skromno uključuju u sistem organizacija lokalnih sportskih klubova, udruženja i saveza. Školski sistem obrazovanja samo delimično ukazuje i implementira - može se apostrofirati, nedovoljno, ostvaruje ulogu prevencije zdravlja putem sporta, odnosno održivog, svesnog bavljenja

sportskom rekreacijom. Gojaznost mladih je ozbiljan problem. Cilj je osmišljeno promovisati navike zdravog života, pojačano delovati na svest o važnosti brige za svoje zdravlje.

Širom Srbije izuzetno su retki pozitivni primeri besplatno organizovanih sportskih rekreativnih programa od strane sportskih centara, saveza, konkretnih sportskih klubova ili aktivacije odgovornih opštinskih i gradskih uprava zaduženih za sport i omladinu. Postoje velike mogućnosti da se planski omasovi i primereno unapredi sportska rekreacija dece i mladih, da se uključe sportski menadžeri, treneri, organizatori gradskih manifestacija i sportskih priredbi i roditelji. Ima mnogo zapuštenih sportskih igrališta. Rekreativni sport, generalno, teško da će se popeti na zadovoljavajuću lestvicu masovnosti ukoliko se ne angažuju stručnjaci za marketing – sa osnovnom idejom “kako stvoriti doživotnog rekreativca”. Upravo je veliki, upadljiv zdravstveni problem današnjice, “pupčano” vezan za nedostatak fizičke aktivnosti, kako kod dece i mladih, tako i starijih.

Odgovorni marketing menadžment i primerena marketing komunikacija može poletno da pristupi promociji školskog i rekreativnog sporta. Intencija je da se podsticajno povežu odgovorni iz sportskih saveza i građanstvo. Ipak, Ministarstvo omladine i sporta i Ministarstvo prosvete, nauke i tehnološkog razvoja su prvi na potezu?!

3.4 POTENCIJALI SPORTKO REKREATIVNOG TURIZMA U SRBIJI

U Srbiji postoji nekoliko prilično uspešnih marketing priča vezano za sportsko rekreativni turizam. Destinacije koje ćemo ukratko predstaviti su: Kučevo, Vrnjačka Banja, Zlatibor i Kopaonik.

Na primer, relativno skroman hotel Rudnik u Kučevu, velike nade je usmerio na sportski turizam. Ciljne grupe su muške i ženske sportske ekipe u fudbalu, košarci, odbojci, borilačkim sportovima, plivanju i rukometu u svim fazama trenažnog procesa. Hotel nudi korišćenje sportskih terena prema potrebi, kao i sale za predavanja i sastanke.

Vrnjačka Banja poslednjih godina sve više ulaže u razvoj sportskog i sportsko rekreativnog turizma. Saradnja sa sportskim klubovima i sportistima je korektna i profesionalna. Veoma je povoljan balneoklimatološki faktor mineralne vode, zatim prijatna klima, reljef, prelepi parkovi, pitomi predeli, privlačne šume, zdrava hrana, razvijena fizikalna medicina sa lekarima specijalistima i dr. Postojeći hotelski i dr. kapaciteti mogu smestiti zamašan broj sportskih ekipa. Saradnja gradske uprave sa turističkim agencijama i drugim organizatorima putovanja je korektna.

U Vrnjačkoj Banji postoji više sportsko rekreacionih centara, fudbalskih igrališta, tribina, atletskih stazi, terena za odbojku na pesku i dr. Sportska hala “Vlade Divac” je otvorena 2008. god. i predstavlja klasičan multifunkcionalan objekat za organizovanje sportskih manifestacija, utakmica, priprema, treninga i kampova, kao i različitih kulturno zabavnih događaja. U zimskom periodu turističku rekreativnu ponudu Vrnjačke Banje predstavlja planina Goč, sa odličnim uslovima za rekreativno skijanje ili organizovanje skijaških takmičenja. U letnjim vrelim danima značajna turistička ponuda se zasniva na olimpijskom bazenu, sa pratećom opremom, dok zatvoreni bazeni u sklopu sadržajnih vrnjačkih hotela pružaju odlične mogućnosti upražnjavanja vaterpola i plivanja tokom cele godine. Interesantna turistička ponuda je i veštačka stena za sportsko penjanje (free climbing), kako za odrasle, tako i mlade; ili takmičenje u povlačenju konopca, gađanje pikadom, skakanje u vrećama i dr.[8]

Takođe, turistima rekreativcima, Zlatibor nudi odlične uslove u mnogim sportovima, kao što su fudbal, košarka, odbojka, tenis, plivanje, teretane, fitness i skijanje, kao i sijaset pešačkih i biciklističkih staza, kao ciklično kretanje puteljcima, preko livada. Postoje i kružne šetnje za porodice sa bebama i decom u kolicima. Staze imaju imena, osnovne informacije o dužini, težini, usponima, trajanju, o vidikovcima i druge geografske odrednice. Očito da se radi o osmišljenom marketinškom pristupu ljudi koji upravljaju Zlatiborom. Isto tako, turisti mogu da uživaju i u rekreativnom jahanju konja. Konjički klub "Farma Zlatibor" ima 25 registrovanih konja i 4 ponija. U klubu radi trener sa licencom za obuku u jahanju i dresuri konja. Pod nadzorom trenera i uz njegove savete i pomoć moguće je učiti različite veštine sa konjima, učestvovati u turističkom i terenskom jahanju, voziti se u kočiji, ali i upravljati zapregom i kočijom.

Kod Zlatibora u selu Jablanica svake godine u junu mesecu se održava seoski višeboj – takmičenje meštana, ali i turista u tradicionalnim zanatima, veštinama i sportovima. Takmiče se u skoku u dalj iz mesta, bacanje kamena s ramena, prevlačenje konopca, skok u vis i dr. Među najizazovnijim ponudama za aktivan odmor na Zlatiboru na površini od 3 ha kako za decu, tako i za odrasle su: Avantura park, Dino park, Zip line, Veštačka stena za penjanje, poligon za vožnju rolera i kvadova za decu i dr.

Kreativni marketinški pristup nadležnih i odgovorno upravljanje turističkim kreacijama za rekreativni sportski odmor, Zlatibor su učinili među najpoželjnijom destinacijom u Srbiji, kako u letnjim, tako i u zimskim uslovima. Očito je da Turistička organizacija Zlatibor ima profesionalni stručni kadar koji može kvalitetno i uspešno da osmisli i sprovede prikladne sportsko rekreativne programe. Angažovani su školovani sportski animatori odnosno instruktori ili treneri za sportove kao što su tenis, jahanje, skijanje, penjanje, zatim boravak u Avantura parku i dr. [9]

Sportsko rekreativne aktivnosti koje turista može dobiti na planini Kopaonik su: Rafting, Paraglajding, Streličarstvo (luk i strela), Kanjoning, Vožnja terenskim vozilima „off road tour“, Planinski biciklizam – bike park-downhile staze, Planinski biciklizam –cross country staze, Izleti – pešačke staze, razne pešačke ture, jahanje, alpinizam, Panoramska vožnja žičarom – Pančić Express i dr.[10]

4. MARKETINŠKA POSTAVKA U UPRAVLJANJU SPORTSKO REKREATIVNOG TURIZMA U SRBIJI

Da bi se sportsko rekreativni programi delotvorno osmislili i stručno sprovedi u praksi, očito je da su potrebni istinski profesionalci struke. Neophodno je, na prvom mestu, pristupiti prigodnom, profesionalnom istraživanju tržišta, sa elementima pozicioniranja i segmentacije ciljnih grupa, zatim planski ispitati i postaviti razvoj aktivnog odmora, u skladu sa potrebama, željama i zahtevima potencijalnih i postojećih turista. Istovremeno, treba analizirati moguću prodaju, i naći efikasne kanale distribucije. Svakako veoma bitna stvar je i kreiranje i implementacija kreativne marketing komunikacije, nastojeći da se primene verodostojni promotivni elementi, a birajući između lične prodaje, oglašavanja, odnosa s javnošću, publiciteta, ili direktnog marketinga, unapređenja prodaje, komunikacije od usta do usta, nastupa na sajmovima, ili koristeći veb sajt, društvene mreže, mobilni marketing, poslovni blog, diskusione grupe i blogove i dr. Sve to podrazumeva finu integraciju i koordinaciju svih funkcija u organizaciji koja se bavi osmišljavanjem i sprovođenjem programa u turizmu, sa elementima sporta i rekreacije.

Značaj marketing menadžmenta u polju sportsko rekreativnog turizma je gotovo esencijalan. “Marketing menadžment ili upravljanje marketingom, jeste posao marketing menadžmenta.” [11, str. 11] U krajnjoj instanci, njegova osnovna uloga je da postigne dobar, prikladan imidž turističke ponude, sa akcentom na sportsko aktivan odmor, što će se odraziti na rast prodaje aranžmana, u kojoj će sportska rekreacija turista biti integralni deo ponude. Ukoliko se razumevanje marketinga posmatra iz perspektive “kako stvoriti doživotnog potrošača”, odnosno turistu, upravo je odgovorni marketing menadžer ta osoba koja prelomno “vuče” ključne odluke. On planira, usmerava, prati i koordinira kako proizvodom, odnosno uslugom, tako i istraživanjem, zatim formiranjem cena turističke ponude, kanalima prodaje, promocijom i dr. F. Kotler kaže da “marketing menadžment treba shvatiti kao umetnost i nauku biranja ciljnih tržišta i privlačenja, zadržavanja i povećanja broja kupaca stvaranjem, isporučivanjem i predstavljanjem superiorne vrednosti za kupce.” [12, str. 5] Naravno, to treba sagledavati iz ugla turista, odnosno aktivnih rekreativaca.

Autor Yiannakis A. naglašava da društvena uloga sporta značajno doprinosi razvoju sportskog marketing menadžmenta putem: 1. konceptualizacije, dizajna i implementacije istraživanja tržišta sportskih proizvoda, 2. instrumentalnog razvoja 3. promovisanja pružanjem bitnih osnova, posebno u okviru životnih stilova, 4. razvoja opšte informatičke osnove, 5. istraživanja i identifikacije novih tržišta i 6. uvođenja društvene orijentacije i organizacije. [13, str. 103-115] Na početku smo napomenuli ulogu sporta u širenju društveno odgovorne svesti, odnosno društveno odgovornog ponašanja. Kako je ova oblast jedna od trenutno prioritarnih fokusa svih učesnika na tržištu, te i onih iz sveta sporta i industrije sporta, važno je naglasiti vezu između društvene odgovornosti i sporta na tržištu sportsko rekreativnog turizma.

Marketing menadžeri moraju dati odgovor koji je to stručan i podsticajan način realizacije usluge sporta i sportske rekreacije u sferi turističkih putovanja i aktivnog odmora. Za to je neophodno uključiti profesionalni, edukovani kadar u delu sporta i sportske rekreacije. Radi se o aktivnim ili bivšim sportistima, vrsnim trenerima ili diplomiranim studentima iz sportske sfere. Zadatak sportskih stručnjaka je naročito naglašen, jer oni osmišljavaju, organizuju i sprovode raznovrsne, podsticajne programe rekreativnog miksa za odabranu klijentelu. U njihovom domenu je i iznajmljivanje i korišćenje sportskih terena, sala, objekata, opreme; zatim organizovanje utakmica, “rekreativnih” turnira i takmičenja šireg spektra, zabavnih sportskih atrakcija, ali i sportske aktivnosti za one koji žele da osete dodatni adrenalin u avanturističkim akcijama. Nikako ne bi trebalo zaboraviti i osobe sa invaliditetom. Autor Milan Tomić ističe: “Vežbanje za sportistu je najznačajnija, osnovna funkcija bavljenja sportom. Prosto vežbanje, bez stručnih i naučnih značajnih procesa, za čoveka je isto što i za Sizifa guranje kamena uzbrdo.” [14, str.431] Dakle, učešće stručnih lica iz sveta sporta je neophodan element marketinške strategije sportsko rekreativnog turizma.

Sve impozantniji broj aktuelnih turista u Srbiji nastoji da doživi nešto sasvim novo, nesvakidašnje iskustvo, začinjeno lepotom prirode, aktivnim druženjem autentičnim doživljajem koji se dugo pamti. Turističke agencije u Srbiji koje u delu vlasništva ili menadžmenta imaju marketinški edukovane rukovodioce, organizatore, vodiče i druge školovane menadžere, u delu realizacije turističkih putovanja osmišljavaju i realizuju inspirativne kombinacije sportsko rekreativnih turističkih usluga tokom boravka na ponuđenim destinacijama. Shodno popisu, turističkih agencija u Srbiji ima 262, zatim pridruženih članica 48 i internacionalnih članica 29 što je ukupno 339 članica Yute. [15] Tako izražajna, surova konkurencija zahteva od učesnika da lestvicu ponude, kreativnosti, ushićenja i aktivnog odmora “podignu još više”.

5. PONUDE PRILAGOĐENE CILJNIM GRUPAMA

Shodno istaknutom, kritična uloga marketing menadžmenta je da jasno i konstruktivno promoviše zdrave, napredne životne stilove. U kontekstu sportsko rekreativnog turizma, fokus marketing menadžmenta je na isticanju potencijala aktivnog odmora. Naglašavanje potencijala nezavisno od drugih aspekata sporta, nije dovoljno. Tome treba dodati i društveno odgovornu dimenziju sporta, kao i efekata na psihofizičko zdravlje čoveka. U tom procesu treba koristiti pozitivan pristup koji znači naglašavanje pozitivnih aspekata celokupne strategije, bez usmerenja ka tvrdnjama u pravcu da ako se ne bavite sportom, ili niste sportsko rekreativni turista, imaćete negativne efekte na zdravlje, ili takvo ponašanje nije društveno odgovorno. Dakle, autori ovog rada smatraju da je u kreiranju marketinške strategije na tržištu sportsko rekreativnog turizma neophodan pozitivistički pristup. U tom procesu, “menadžeri marketinga bi morali izvrsno i pragmatično da poznaju sve odlike i potencijale marketinških procesa, funkcija i elemenata.” [16, str. 14]

Ipak, kreiranje marketinške strategije mora biti prilagođeno različitim potrebama segmenata potrošača. Značajan broj turista iz Srbije nastoji da bude deo sportskih dešavanja, a posebno međunarodnih spektakala. U tom kontekstu, prisutan je i trend raznovrsnosti. To je svojevrsna šansa za organizatore putovanja da kreiraju prikladne ponude prilagođene ciljnim grupama turista koji žele da prate sportske događaje. U te svrhe, u razvijenim evropskim državama posebno su se diferencirale specijalizovane turističke agencije za sportsko - rekreativni turizam, kao turoperateri i sl. Turisti putuju na velika takmičenja koja su motivisana sportom ili razonodom, usmerena na određeno društvo, bilo da se radi o nacionalnim, evropskim ili svetskim takmičenjima, olimpijadama - u gro sportova. To su prvenstveno navijačka i porodična putovanja, ali se izdvojila i avanturistička putovanja.

Značajni svetski turoperateri su TUI, Sportsworld, ITC i dr. i oni nude turistima paket aranžmane za posetu sportskim takmičenjima bilo da se radi o fudbalu, tenisu, trkama formule 1, atletskom prvenstvu, ragbi takmičenju, trkama konja i dr. Od 1997. god. od kada je pokrenut, čuveni časopis “Sports Travel” je dao vidan doprinos sportskoj industriji u delu putovanja i praćenja sportskih događaja. Publikacija je pisana i dizajnirana za ljude koji organizuju i upravljaju sportskim događajima širom sveta. [17]

Dakle, pored standardnog konteksta turističke ponude koja integriše sportsko rekreativne aktivnosti, ponuda može biti kreirana i u odnosu na segmente potrošača koji prate velike sportske događaje u drugim zemljama. U okviru ovog segmenta, možemo izdvojiti one koji putuju na sportske događaje u kojima igraju domaći klubovi na stranom terenu, i one u kojima igraju omiljeni strani timovi.

Kriterijumi segmentacije ciljnih grupa mogu biti definisani prema:

1. Sadržaju turističke ponude, odnosno fokusu na konkretne sportske aktivnosti,
2. Publici koja želi da prati sportske događaje u inostranstvu.

U prvoj grupi možemo izvršiti podelu prema starosti (deca i odrasli, a zatim odrasli po godinama), ali i polu turista, kao i drugim spoljašnjim faktorima uticaja na ponašanje potrošača te i njihove želje. Takođe, ovaj opšti kriterijum može biti posebno prilagođen turistima koji žele ekstremnu avanturu, odnosno prema onima koji žele mirniji, ali i dalje aktivan odmor.

Kao posledica različitih grupa turista, te i onih koji žele da konzumiraju sportsko rekreativne turističke usluge, povezani učesnici na ovom tržištu su prilagodili svoje kapacitete. Naime,

usled sve impozantnijeg značaja sportskog rekreativnog turizma, kako u nacionalnom ili internacionalnom rangu, ambiciozni hotelijeri su izgradili prikladne sportske kapacitete, sa dodatnim sadržajima, kako bi privukli i zadržali turiste. Možemo zaključiti da je prilagođavanje ponude ovih učesnika posledica sve većeg trenda sportsko rekreativnog turizma i aktivnog odmora.

ZAKLJUČAK

Vrtoglavi industrijski razvoj, ili sve izrazitiji ekološki propusti na očuvanju životne sredine, zatim otuđenje čoveka, zagušenja u urbanim aglomeracijama, svakako da iniciraju potrebu ljudi za aktivnim odmorom i zdravom rekreacijom. Naime, sve veći broj ljudi ima potrebu da boravi u prirodi na čistom vazduhu, u zdravom okruženju, u humanim uslovima. Napetost koja se odražava u fizičkom i psihološkom smislu – prepoznata kao stres, otklanja se redovnim šetnjama, fizičkim vežbama, opuštanjem i rekreacijom u prirodi na čistom vazduhu. Samim tim, sportsko rekreativni turizam, kao autentični megatrend u turističkim relacijama mogao bi postati jedan od najbrže rastućih aspekata turističke industrije. Bez školovanih, stručnih kadrova, posebno marketing menadžera, u procesu upravljanja i organizovanja sportsko rekreativnim programima, razvoj bi bio usporen.

Marketinške strategije sportskog turizma moraju biti oblikovane prema zahtevima različitim segmentima turista. One su neophodan deo ukupne turističke strategije, i to u aktivnostima privlačenja i zadržavanja turista. Marketinški instrumenti koje treba primeniti su mnogobrojni, počev od istraživanja turističkog tržišta, sa fokusom na korisnike usluga iz ovog područja, zatim na konkurenciju, ali i kapacitete i potencijale na strani ponude, preko segmentacije i pozicioniranja, do odluka o načinima komunikacije, sadržajima poruke i medijima, i zaposlenih koji treba da budu u direktnom kontaktu sa turistima.

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**ANALIZA KONKURENTSKE POZICIJE NAJAKTIVNIJIH I VIŠE
AKTIVNIH ZEMALJA U NANO-TEHNOLOGIJI U PERIODU 2008-
2017. GODINA¹⁵³**

**THE ANALYSIS OF THE COMPETITIVE POSITION
OF THE MOST AND MORE ACTIVE COUNTRIES IN
NANOTECHNOLOGY IN THE PERIOD 2008-2017**

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Sadržaj — Bibliometrijski pokazatelji se tradicionalno koriste u analizi i proceni konkurentske pozicije zemalja u nano-tehnologiji. U ovom radu, konkurentska pozicija zemalja je određena brojem nano-tehnoloških publikacija, ukupnim i prosečnim brojem citata. Korišćeni su podaci Nanostat-a o posmatranim indikatorima u periodu 2008-2017. Zemlje su klasifikovane u dve grupe prema posmatranim indikatorima. Cilj ovog rada je bio da pruži pregled konkurentske pozicije posmatranih (grupa) zemalja i da utvrdi nivo njihove (diferentne) prednosti u periodu 2008-2017. Utvrdili smo da je diferentnost između grupa izražena.

Ključne reči: konkurentska pozicija zemalja, diferentnost, nano-tehnologija

Abstract — Bibliometric indicators are traditionally used for the analysis and the assessment of the competitive position of the countries in nanotechnology. In this paper, the competitive position of the countries was determined by the number of nanotechnology publications, the number of citations, and the average number of citations. The data on the observed indicators published by Statnano in the period 2008-2017 were used. Countries were classified into two groups according to the observed indicators. The aim of this paper was to provide a review of the competitive position of the observed (groups of) countries and to determine the level of their (differential) advantage in the period 2008-2017. It was found that the differential between the groups is pronounced.

Keywords: competitive position of the countries, differential, nanotechnology

1. UVOD

Konkurentsko pozicioniranje zemalja u nano-nauci i nano-tehnologiji zaokuplja pažnju velikog broja istraživača, a naročito kada je u pitanju pozicioniranje zemalja koje aktivno participiraju u nano-tehnologiji. *Lux research* analizira konkurentsku poziciju

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zemalja kroz identifikovanje konkurentskog statusa svake od njih a koji utvrđuje pomoću dva složena indikatora – nivoa nano-tehnološke aktivnosti i snage tehnološkog razvoja zemlje. Kombinacija ovih indikatora je dala četiri grupe i četiri statusa odnosno pozicije zemalja: one koje su dominante (*Dominant countries*), one koje su nišeri – imaju niži nivo nano-tehnološke aktivnosti od prvopomenutih (*Niche countries*), one koje su nazvane *Ivory Tower countries* (imaju isti raspon nivoa nano-tehnološke aktivnosti kao dominantne zemlje ali su nižeg nivoa tehnološkog razvoja), i one koje su od manjeg značaja tzv. *Minor League* tj. zemlje čiji je nivo nano-tehnološke aktivnosti u rasponu nivoa nano-tehnološke aktivnosti zemalja – nišera [1]. Sve zemlje koje su pozicionirane u neku od navedene četiri grupe se smatraju globalno aktivnim zemljama u nano-tehnologiji. Svaka od njih teži poboljšanju statusa i repositioniranju u višu grupu što ostvaruju primenom strategija koje su osobene za svaku grupu konkurenata – od lidera do nišera [2], [3], [4].

Zemlje koje su globalno aktivne u nano-tehnologiji pokazuju različit intenzitet nano-tehnološke aktivnosti i međusobne konkurentnosti koje su promenljive tokom vremena. Kao indikator konkurentne pozicije zemalja u nano-tehnologiji u ovom radu je upravo korišćen nivo nano-tehnološke aktivnosti pod kojim se podrazumeva aktivnost zemlje u nano-tehnološkim istraživanjima. U odnosu na pokazatelje ovog indikatora, prema organizaciji *Lux research*¹⁵⁷, u ovom radu su pored publikacija korišćeni i pokazatelji kvaliteta naučnih istraživanja u nano-tehnologiji.

Prema navedenom, analizirane su pozicije dve grupe zemalja: onih koje su najaktivnije i onih koje su više aktivne u nano-tehnologiji. Pozicija svake zemlje je određena brojem njenih nano-tehnoloških publikacija, brojem ukupnih nano-tehnoloških citata i prosečnim brojem citata u periodu 2008-2017. godina. Podaci o izabranim indikatorima su preuzeti od institucije Statnano (koja ih javno publikuje) na dan 25.10.2018 [5]. Cilj ove analize je bio da pruži pregled konkurentne pozicije posmatranih zemalja (pa i grupa) u nano-tehnološkoj aktivnosti i nivo njihove diferentne prednosti, ukoliko je ostvaruju, u posmatranom periodu. Na taj način bi se utvrdilo da li je došlo do pojave novih konkurenata i kako su se pozicionirali tradicionalni konkurenti tokom vremena.

Rad je strukturiran tako da su u odeljku dva pojmovno određeni indikator konkurentne pozicije te pozicioniranje zemalja u nano-tehnologiji – važniji nalazi dosadašnjih empirijskih istraživanja, u odeljku tri je prezentovan predmet analize, u odeljku četiri analiza i diskusija. Potom slede nalazi, zaključak i popis literature koja je korišćena u radu.

2. INDIKATORI KONKURENTSKE POZICIJE I POZICIONIRANJE ZEMALJA U NANO-TEHNOLOGIJI – VAŽNIJI NALAZI DOSADAŠNJIH EMPIRIJSKIH ISTRAŽIVANJA

Indikator konkurentne pozicije u nano-tehnološkoj aktivnosti su mnogobrojni. Najčešće korišćeni su nano-tehnološke publikacije i citati. Bibliometrijska metoda je osnova pretrage broja publikacija, pa i nano-tehnoloških publikacija i njihove citiranosti. Prema [6] ova dva indikatora su standardni alati koji se koriste u proceni pozicije zemlje ili institucija u naučnim istraživanjima. Njihova korist u području nano-tehnologije je velika s obzirom na činjenicu da postoji niz ograničenja po pitanju analize naučnih istraživanja u nano-tehnologiji [7].

¹⁵⁷ Prema [1], pokazatelji nivoa nano-tehnološke aktivnosti su: nanotehnološka inicijativa, nanotehnološki centri, investicije, publikacije, patenti, broj aktivnih nanotehnoloških kompanija.

U ovom radu su analizirane nano-tehnološke publikacije, koje su jedan od indikatora nivoa nano-tehnološke aktivnosti zemlje [1], a koji opredeljuje njen konkurentski status. Nano-tehnološke publikacije nisu samo publikacije koje pokrivaju oblast, formalno nazvanu, nano-tehnologija već i one koje su njoj kompatibilne kao što su bio-tehnologije, kognitivne nauke i informacione tehnologije kada su zasnovane na nano skali, o čemu se govori u [8], [9], [10]. One su indikatori obima osnovnih istraživanja, ali su istovremeno važni kao input za dalja primenjena istraživanja u oblasti nano-tehnologije [10: 202]. Druga dva indikatora su ukupan i prosečan broj nano-tehnoloških citata koji treba da pokažu koliko su nano-tehnološke publikacije citirane, imajući u vidu da postoji veći ili manji disparitet po tom pitanju, što znači da pojedine publikacije mogu biti citirane u velikom ili malom broju, pa čak i da nemaju nijedan citat.

U [11: 127] je prezentovana pozicija 30 zemalja u nano-tehnološkim publikacijama u periodu 1988-2012. godina, pri čemu je korišćeno više pristupa u pretrazi publikacija. Leksički upit je za rezultat dao sledeće: SAD, Kina, Japan, Nemačka, Francuska, Velika Britanija, Južna Koreja, Rusija, Indija i Italija su bile na prvih 10 mesta prema broju nano-tehnoloških publikacija u ovom periodu. Ostalih 20 mesta su zauzele Španija, Tajvan, Kanada, Australija, Švajcarska, Poljska, Holandija, Singapur, Brazil, Švedska, Iran, Belgija, Izrael, Austrija, Ukrajina, Meksiko, Turska, Rumunija, Češka i Finska, respektivno.

Prema broju nano-tehnoloških publikacija, u periodu 1990-2010. godina, u top pet globalnih igrača su se tradicionalno pozicionirali SAD, Kina, Japan, Nemačka i Južna Koreja [12: 362, Fig. 2] dok je u periodu 1991-2012. godina redosled prva četiri igrača bio isti, ali je umesto Južne Koreje bila pozicionirana Francuska [13: 8, Tab. 5]. Ostale pozicije su, prema [13: 8, Tab. 5], popunili Južna Koreja, Engleska, Indija, Italija, Rusija, Španija, Kanada, Tajvan, Australija, Švajcarska, Holandija, Singapur, Poljska, Brazil i Švedska. Slični nalazi, posmatrajući prvih 10 zemalja u periodu 1995-2011. godina, se mogu naći i u [14: 20, Fig. 124] a one su SAD, Kina, Japan, Južna Koreja, Nemačka, Indija, Francuska, Velika Britanija, Tajvan i Italija. Rusija se, evidentno, nije pozicionirala u prvih 10 zemalja kao što je u [11: 127] i [13: 8, Tab. 5]. Na osnovu navedenog, a prema svim nalazima ovde prezentovanih istraživanja o nano-tehnološkim publikacijama, prva četiri mesta su bila rezervisana za SAD, Kinu, Japan i Nemačku.

Prema ukupnom broju nano-tehnoloških citata, u periodu 1995-2011. godina, među prvih 10 zemalja su bile pozicionirane SAD, Kina, Japan, Nemačka, Velika Britanija, Južna Koreja, Francuska, Indija, Švajcarska i Kanada [14: 19, Tab. 1]. SAD su izgubile leadersku poziciju od Kine tokom 2012. godine [15: 13, Fig. 0.10]. U [16: 1923] se navodi da je rastu kineskih nano-tehnoloških citata pogodovao trend internog citiranja među uglednim kineskim istraživačima za razliku od američkih autora odnosno istraživača. Kada su u pitanju ostale zemlje, prema [15: 13, Fig. 0.10], tradicionalni konkurenti azijskog regiona - Japan, Južna Koreja i Indija, i evropskog područja - Nemačka, Francuska, Velika Britanija i Italija, kao i Iran, su bili diferentno niže pozicionirani od SAD i Kine (period 2010-2014. godina). Uočava se povoljno repositioniranje Irana koji nije bio u prvih 10 u periodu 1995-2011. godina.

Ukoliko se konkurentnost zemalja posmatra prema prosečnom broju nano-tehnoloških citata, uviđa se da su Švajcarska i Holandija tradicionalno visoko pozicionirane zemlje [14: 19, Tab. 1]. Prema [17: 156, Fig. 52], one su bile pozicionirane na prva dva mesta i u periodu 1991-2000. godina. U navedenom periodu SAD su bile treća, a Kina 23. zemlja po redu. Od četvrtog do 24. mesta su bile Kanada, Belgija, Irska, Velika Britanija, EU 25, Danska, Francuska, Japan, Nemačka, Španija, Izrael, Brazil, Austrija, Italija, Švedska, Australija, Indija, Poljska, Rusija,

te 24. po redu Južna Koreja. U prvim godinama 21. veka, dolazi do male promene u prvim pozicijama. Prema [18: 4], među prvih 10 zemalja su bile pozicionirane Švajcarska, SAD, Danska, Holandija, Velika Britanija, Izrael, Nemačka, Švedska, Finska, Norveška i 11. po redu Kanada. Zapaža se povoljno pozicioniranje evropskih odnosno skandinavskih zemalja i Izraela prema prosečnom broju nano-tehnoloških citata.

3. METODOLOGIJA - ODREĐENJE PREDMETA ANALIZE

Da bi se obavila navedena analiza, najpre su određeni indikatori pozicija dve grupe zemalja (onih koje su najaktivnije i onih koje su više aktivne u nano-tehnologiji) a to su ukupan broj nano-tehnoloških publikacija, ukupan broj nano-tehnoloških citata i prosečan broj nano-tehnoloških citata. Izvor podataka za navedene indikatore je baza Statnano koja koristi podatke WoS baze odnosno baze *Web of Science*. Podaci su preuzeti na dan 25.10.2018. godine za period 2008-2017.

Prvu grupu zemalja, prema broju nano-tehnoloških publikacija i citata, čine Kina i SAD. One su najaktivnije zemlje u nano-tehnologiji. One su i zemlje čiji se broj nano-tehnoloških publikacija i citata značajno razlikuje od broja ovih publikacija i citata ostalih zemalja a pri tome su, prema ovim indikatorima, međusobno najslbližnije. Lider prosečnog broja citata u posmatranom periodu je Singapur, i u okviru ove grupe je samo prikazana njegova pozicija (Tabela br. 1).

U drugoj grupi zemalja se nalaze zemlje sa brojem nano-tehnoloških publikacija od 10.000 i više (a manje od broja ovih publikacija Kine), brojem nano-tehnoloških citata od 150.000 i više (a manje od broja ovih citata SAD) i prosečnim brojem citata od 200 i više u posmatranom desetogodišnjem periodu (a manje od broja ovih citata Singapura). Od važnosti je naglasiti da je pozicija Singapura posmatrana sa pozicijama ostalih zemalja ove grupe usled slabe međusobne diferentnosti u prosečnom broju nano-tehnoloških citata (Tabela br. 1).

Prema navedenom, u analizu konkurentne pozicije je uključena 31 različita zemlja i to: 25 zemalja je učestvovalo u analizi konkurentne pozicije prema broju nano-tehnoloških publikacija, od kojih je 24 bilo uključeno i u analizu pozicije prema ukupnom broju nano-tehnoloških citata (jedna zemlja nije zadovoljila kriterijum za analizu prema ukupnim citatima iako je analizirana prema publikacijama - Malezija). Od postojećih 25 zemalja, 12 zemalja se kvalifikovalo za analizu pozicije prema prosečnom broju nano-tehnoloških citata koja zbirno broji 18 zemalja. Ovo znači da je analizirano još šest (novih) zemalja čija pozicija prema nano-tehnološkim publikacijama i citatima nije analizirana, jer su imale manji broj ovih publikacija i citata od zadatog kriterijuma (Tabela br. 1).

Tabela br. 1: Pregled analiziranih zemalja po grupama i prema indikatorima

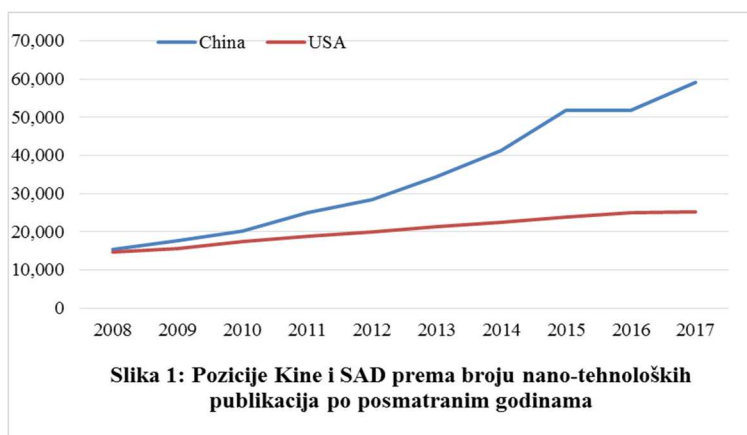
| rang | zemlje prema nano-tehnološkim publikacijama | rang | zemlje prema nano-tehnološkim citatima | rang | zemlje prema prosečnim nano-tehnološkim citatima |
|---|---|------|--|------|--|
| Prva grupa zemalja – najaktivnije zemlje u nano-tehnologiji | | | | | |
| 1 | Kina (China) | 1 | SAD | 1 | Singapur |
| 2 | SAD (USA) | 2 | Kina | | |
| Druga grupa zemalja – više aktivne zemlje u nano-tehnologiji | | | | | |
| 3 | Indija (India) | 3 | Nemačka | 2 | Švajcarska |
| 4 | Nemačka (Germany) | 4 | Japan | 3 | SAD |
| 5 | J. Koreja (S. Korea) | 5 | J. Koreja | 4 | Holandija |
| 6 | Japan (Japan) | 6 | Indija | 5 | Australija |
| 7 | Francuska (France) | 7 | V. Britanija | 6 | Danska (Denmark) |

| | | | | | |
|----|---------------------------|----|------------|----|----------------------------------|
| 8 | Iran (Iran) | 8 | Francuska | 7 | Irska (Ireland) |
| 9 | V. Britanija (UK) | 9 | Španija | 8 | V. Britanija |
| 10 | Rusija (Russia) | 10 | Singapur | 9 | Švedska |
| 11 | Španija (Spain) | 11 | Italija | 10 | Ujedinjeni Arapski Emirati (UAE) |
| 12 | Italija (Italy) | 12 | Australija | 11 | Nemačka |
| 13 | Tajvan (Taiwan) | 13 | Kanada | 12 | Kanada |
| 14 | Kanada (Canada) | 14 | Iran | 13 | Estonija (Estonia) |
| 15 | Australija (Australia) | 15 | Tajvan | 14 | Belgija |
| 16 | Singapur (Singapore) | 16 | Švajcarska | 15 | S. Arabija |
| 17 | Brazil (Brazil) | 17 | Holandija | 16 | Austrija (Austria) |
| 18 | Poljska (Poland) | 18 | Švedska | 17 | Finska (Finland) |
| 19 | Švajcarska (Switzerland) | 19 | Rusija | 18 | Španija |
| 20 | Holandija (Netherlands) | 20 | Belgija | | |
| 21 | Turska (Turkey) | 21 | S. Arabija | | |
| 22 | S. Arabija (Saudi Arabia) | 22 | Brazil | | |
| 23 | Švedska (Sweden) | 23 | Poljska | | |
| 24 | Malezija (Malaysia) | 24 | Turska | | |
| 25 | Belgija (Belgium) | | | | |

4. ANALIZA I DISKUSIJA

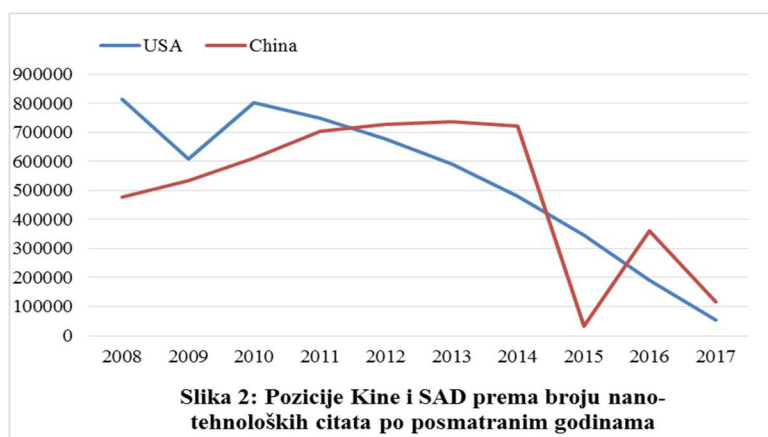
4.1. Analiza konkurentne pozicije i diferentnosti zemalja prve grupe

Ukoliko se posmatraju pozicije Kine i SAD prema broju nano-tehnoloških publikacija, Kina ima izraženu diferentnu prednost u odnosu na SAD u periodu 2008-2017. godina (Slika 1).



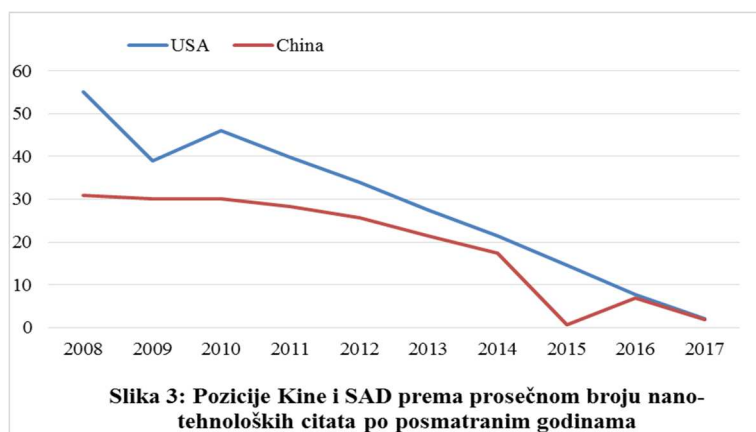
Diferentnost pozicije Kine u broju nano-tehnoloških publikacija se uvećava kontinualno od 2008. godine. Prema [10: 209] Kina je preuzela prvu poziciju od SAD u 2008. godini, ne samo prema broju nano-tehnoloških publikacija, već i prema njihovoj stopi rasta (uzimajući u obzir period 2005-2013. godina).

Pozicije Kine i SAD prema broju nano-tehnoloških citata su prikazane na Slici 2.



Kada se posmatraju pozicije SAD i Kine, prema broju nano-tehnoloških citata, uočava se da Kina ispoljava prednost u odnosu na SAD od 2012. godine, što je potvrđeno i u [15] sa izuzetkom u 2015. godini (Slika 2).

Kina i SAD nisu u prvoj (liderskoj) grupi kada je u pitanju prosečan broj nano-tehnoloških citata. Međutim, pozicija SAD se ne može zbog toga umanjiti, jer je trećeplasirana zemlja (videti Sliku 6). Kina nije plasirana u prvih 18 posmatranih zemalja u ovoj analizi prema prosečnom broju nano-tehnoloških citata. Ipak, ovde su predstavljene pozicije SAD i Kine (Slika 3) kako bi se stekao uvid u njihov međuodnos i prema ovom indikatoru.



Primećuje se izuzetno slaba diferentnost SAD i Kine prema prosečnom broju nano-tehnoloških citata u poslednje dve godine posmatranog perioda (Slika 3). Za očekivati je da će Kina nastaviti sa povoljnim repozicioniranjem i prema ovom indikatoru.

4.2. Analiza konkurentne pozicije i diferentnosti zemalja druge grupe

-analiza prema broju nano-tehnoloških publikacija-

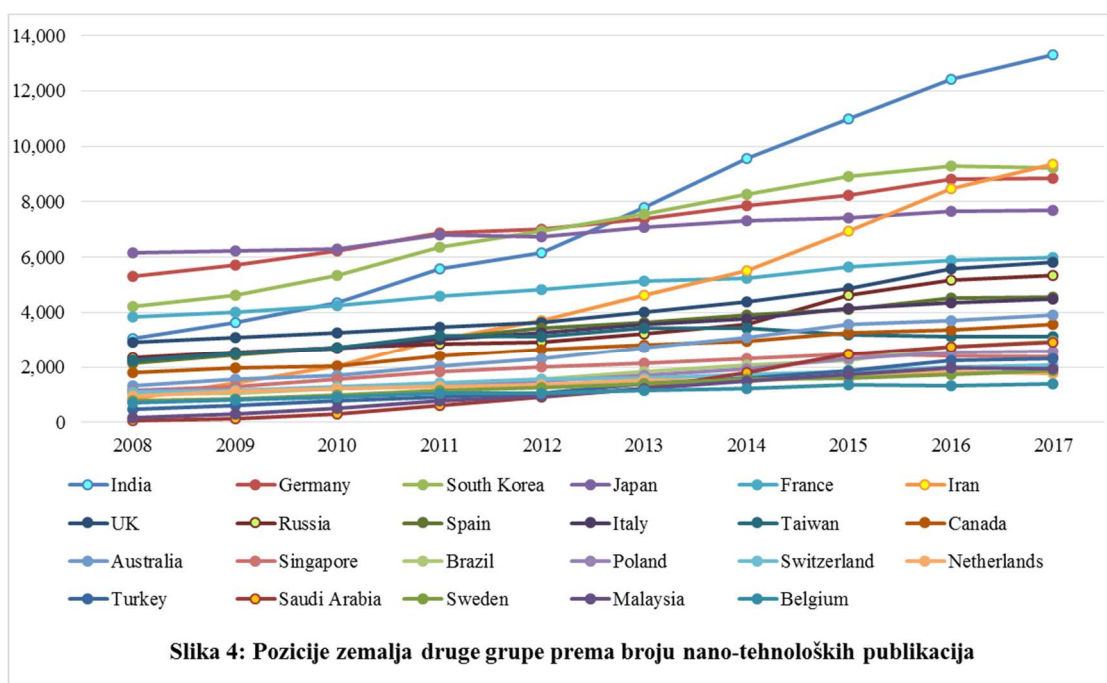
Analizirana je pozicija 23 zemlje. To su zemlje koje su periodu 2008-2017. godina imale ukupan broj nano-tehnoloških publikacija 10.000 i više, a manje od broja ovih publikacija SAD (Tabela br. 1).

U [19] se navodi da se u periodu 1976-2004. godina u prvih 20 zemalja, prema broju nano-tehnoloških publikacija, našla većina zemalja koje su u ovom radu analizirane. Izuzetak su Iran, Singapur i Brazil koje su rangirane u prvih 20 u ovom radu (kao i Turska, Saudijska Arabija i

Malezija koje su rangirane od 21. do 24. mesta u ovom radu). Prema [11: 127] u prvih 30 zemalja, prema broju nano-tehnoloških publikacija u periodu 1988-2012. godina, se nisu pozicionirale Saudijska Arabija i Malezija, dok prema [13: 8, Tab. 5] u prvih 20 zemalja, u periodu 1991-2012. godina, se nisu pozicionirali Iran, Saudijska Arabija, Turska, Malezija i Belgija. Već na osnovu ovoga se može izvući zaključak da su ove zemlje povoljno reorganizirale u savremenim tokovima.

Iran nije bio pozicioniran u prvih 10 zemalja u periodu 1995-2011. godina [14: 20, Fig. 124], niti u prvih 20 zemalja u periodu 1976-2004. godina [19], ali prema [15: 12, Fig. 0.8] Iran je zauzeo poziciju među top 10 konkurenata i imao najbržu stopu rasta u periodu 2010-2014. godina. Pored Irana, među zemljama Bliskog Istoka se, kao regionalni konkurenti, ističu Turska, Egipat i Saudijska Arabija (period 1995-2011. godina) [14: 21, Fig. 14]. Ova činjenica govori o povoljnom reorganiziranju Saudijske Arabije u savremenim uslovima.

Konkurentne pozicije i diferentnost zemalja druge grupe, prema broju nano-tehnoloških publikacija, u posmatranom periodu su prikazane na Slici 4.



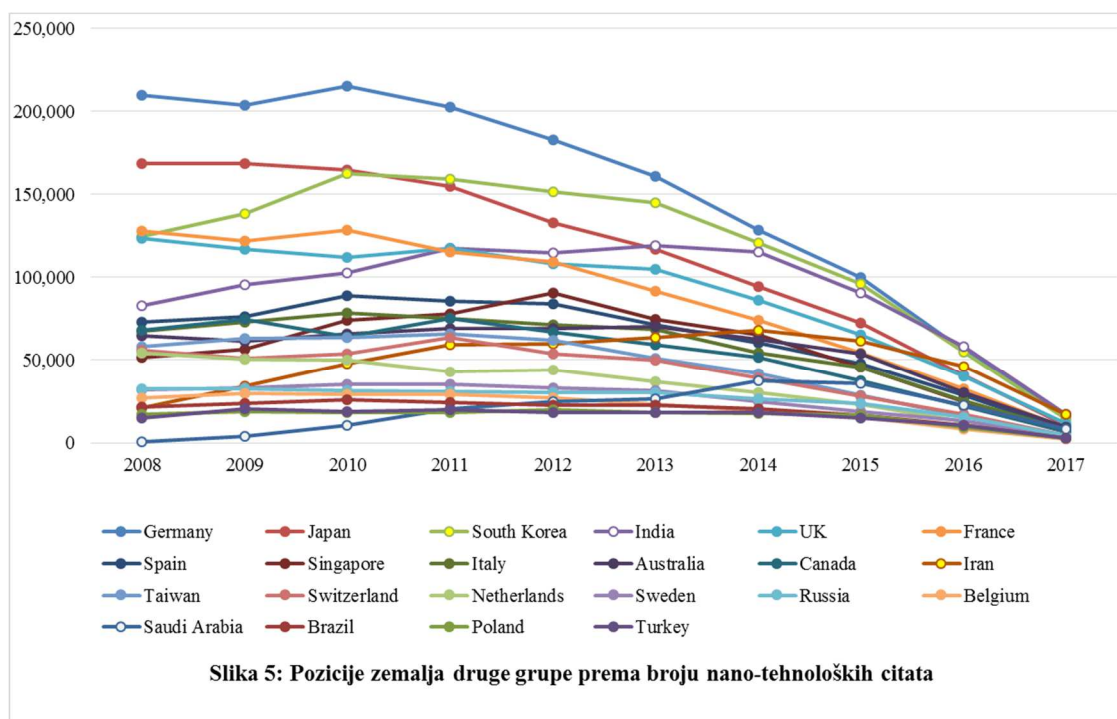
Uvidom u Sliku 4, stiče se saznanje da je Indija preuzela lidersku poziciju u grupi 2013. godine, bivajući diferentno bolje pozicionirana od Južne Koreje, Nemačke i Japana. Indija je prema [14: 20, Fig. 124] bila pozicionirana u prvih 10 zemalja i u periodu 1995-2011. godina. Prema [20: 101] Indija je imala veći rast nano-tehnoloških publikacija od Kine i Južne Koreje i u periodu 2000-2009. godina. Južna Koreja je u istoj godini (2013.) premašila Nemačku i Japan po broju ovih publikacija, ali joj je Iran ugrozio poziciju 2017. godine. Imajući u vidu prve dve plasirane zemlje (Kina i SAD), Indija je treća zemlja prema broju nano-tehnoloških publikacija od 2013. godine.

Francuska je stabilna i deli grupu na dve podgrupe. Iran se pozicionirao u donju podgrupu na početku perioda. Međutim, Iran pokazuje diferentnost pozicije u podgrupi od 2012. godine, tako da se pridružuje gornjem segmentu zemalja, postajući drugi u grupi u 2017. godini sa slabijom diferentnošću prema Južnoj Koreji. Iran se od mnoštva konkurenata sa slabijom diferentnošću pozicije (Velika Britanija, Rusija, Španija, Italija, Tajvan, Kanada, Australija,

Singapur, Brazil, Poljska, Švajcarska, Holandija, Turska, Saudijska Arabija, Švedska, Malezija, Belgija) izdiže u grupu u kojoj su zemlje koje imaju preko 7.000 publikacija u 2017. godini. Navedene zemlje donjeg segmenta ispoljavaju uzastopnu međusobnu konkurentnost (npr. V. Britanija, Rusija, Španija i Italija) itd. Rusija i Saudijska Arabija povećavaju diferentnost u odnosu na niže pozicionirane konkurente od 2014. godine.

-analiza prema ukupnom broju nano-tehnoloških citata-

Analizirana je pozicija 22 zemlje. To su zemlje sa brojem nano-tehnoloških citata od i iznad 150.000 (u periodu 2008-2017. godina), a ispod broja ovih citata Kine (Tabela br. 1). Konkurentne pozicije i diferentnost zemalja druge grupe, prema broju nano-tehnoloških citata, u posmatranom periodu su prikazane na Slici 5.



U periodu 1995-2011. godina, prema [14: 19, Tab. 1], izražena je slaba diferentnost u ukupnom broju nano-tehnoloških citata između Velike Britanije, Francuske i Južne Koreje, kao i između Nemačke i Japana. I u periodu 1990-2006. godina, zapažena je vrlo slaba diferentnost Nemačke i Japana [21: 985, Fig. 3]. Uvidom u Sliku 5, Nemačka jača diferentnost u odnosu na Japan u periodu 2008-2017. godina.

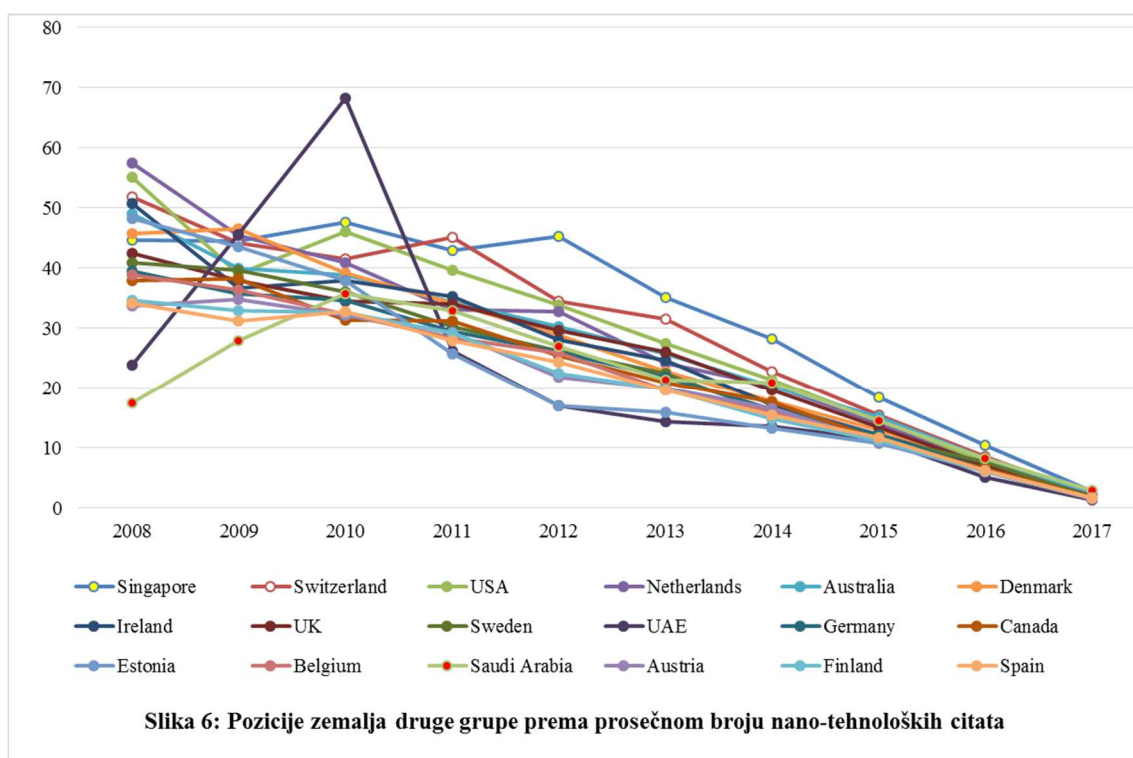
Diferentnost SAD i Kine prema ostalim zemljama koje su bile u prvih 10 zemalja u periodu 2010-2014. godina je izražena, pri čemu Indija ugrožava diferentnost Južne Koreje i Nemačke, a Iran diferentnost Italije, Francuske, Velike Britanije i Japana u broju citata od 2012. godine [15: 13, Fig. 0.10.]. Prema Slici 5, stiče se uvid da su Nemačka, Južna Koreja, Japan, Indija, Velika Britanija i Francuska diferentno pozicionirane (čineći gornji segment) u odnosu na ostale zemlje (koje su u donjem segmentu grupe). Zemlje u donjem segmentu grupe su međusobno manje diferentne nego što su međusobno diferentne zemlje u gornjem segmentu grupe. Najbliži konkurent Nemačkoj od 2010. godine je Južna Koreja koju prati Indija od 2013. godine (Slika 5).

Posmatrajući zemlje u donjem segmentu (Španija, Singapur, Italija, Australija, Kanada, Iran, Tajvan, Švajcarska, Holandija, Švedska, Rusija, Belgija, Saudijska Arabija, Brazil, Poljska, Turska - Slika 5) uočava se povoljnije pozicioniranje Irana i Saudijske Arabije. Iran je započeo sa stvaranjem diferentnosti 2003. godine u kojoj je imao 157 citata, dok je u 2004. godini imao 524, a u 2007. godini 2.425 [22: 99, Fig. 2] što se nastavilo i dalje. Saudijska Arabija, takođe, beleži rast, koji je naročit u periodu 2013-2014.

Na osnovu [15: 13, Fig. 0.10.] se može uočiti da nano-tehnološki citati Indije i Irana pokazuju stabilan rast tokom perioda (2010-2014), što se pokazalo i u ovoj analizi. Uvidom u Sliku 5, zapaža se kontinualno stvaranje diferentnosti od strane Indije u gornjoj podgrupi koja od 2016. godine vodi u grupi, kao i Irana i Saudijske Arabije u odnosu na zemlje koje su pozicionirane blizu njih (Iran je drugi u 2017. godini). Navedeni nalazi su u skladu sa trendom koji iskazuju ove zemlje prema broju nano-tehnoloških publikacija.

-analiza prema prosečnom broju nano-tehnoloških citata-

Analizirana je pozicija 18 zemalja. To su zemlje sa prosečnim brojem nano-tehnoloških citata iznad 200 u periodu 2008-2017. godina (Tabela br. 1). Konkurentne pozicije i diferentnost zemalja prema prosečnom broju nano-tehnoloških citata su prikazane na Slici 6.



Uvidom u [17: 156] u prvih 18 zemalja, prema prosečnom broju nano-tehnoloških citata, su bile pozicionirane i Francuska, Japan, Izrael, Brazil i Italija. Ove zemlje se nisu kvalifikovale u prvih 18 zemalja u ovom radu. Istovremeno, u prvih 18 zemalja u ovom radu su se kvalifikovali Singapur, Ujedinjeni Arapski Emirati (Emirati), Estonija, Saudijska Arabija i Finska a nijedna od njih nije bila ni u top 24 zemlje u periodu 1991-2000. Ostale zemlje, posmatrane u ovom radu, prema ovom indikatoru su bile pozicionirane. Prema [18: 4], evropske zemlje, pored SAD, su bile dominantne u prvim godinama ovog veka u prosečnom broju citata.

Uvidom u Sliku 6, stiče se saznanje da Singapur i Švajcarska (koje stvaraju gornji segment) ostvaruju diferentnost u odnosu na druge zemlje, naročito Singapur. Interesantan je pik Emirata u 2010. godini, i značajnije stvaranje diferentnosti Saudijske Arabije među ostalim zemljama grupe. Finska, Austrija, Emirati i Estonija su sredinom posmatranog perioda bile pozicionirane u donji segment grupe. Međusobno slabije diferentne zemlje kao što su Holandija, Australija, Danska, Irska i Velika Britanija su se pozicionirale u srednji segment grupe. Ostale su gradile donji segment ukoliko se posmatra period u celini.

5. NALAZI

Uporedni pregled pozicija (ranga) posmatranih zemalja prema sva tri indikatora je predstavljen u Tabeli 2.

Ukoliko se izuzmu SAD i Kina, čiji je odnos jasan, a poredeći poziciju zemalja druge grupe u nano-tehnološkim publikacijama i u nano-tehnološkim citatima, uočava se da Nemačka, Japan, Velika Britanija, Španija, Singapur, Italija, Australija, Kanada, Švajcarska, Holandija, Švedska, Belgija i neznatno Saudijska Arabija imaju bolji rang u ukupnim citatima nego u publikacijama (zbirno posmatrano prema ukupnom broju nano-tehnoloških publikacija i citata u ukupnom periodu). Singapur, Švedska i Belgija pokazuju najveću pozitivnu razliku u rang. Južna Koreja ima isti rang u oba indikatora, a Indija, Francuska, Iran, Tajvan, Rusija, Brazil, Poljska i Turska imaju niži rang u nano-tehnološkim citatima nego u nano-tehnološkim publikacijama. Rusija i Iran, te Brazil i Poljska pokazuju najveću negativnu razliku u rang. Međutim, poslednjih godina Iran nivelise tu razliku. Zanimljivo je niža pozicija Francuske i Tajvana ukoliko se one uporede prema navedenim indikatorima. Malezija se nije pozicionirala u ovu grupu prema kriterijumu za citate.

Velika Britanija i Kanada su zemlje sa izraženom ujednačenosti ranga prema sva tri indikatora. Nemačka i Španija, pored SAD, ukazuju na nepovoljnost pozicije u prosečnoj citiranosti nano-tehnoloških publikacija. Ostale zemlje imaju viši rang u prosečnim nano-tehnološkim citatima nego u nano-tehnološkim publikacijama i ukupnim citatima. Interesantno je da Danska, Irska, Austrija, Finska, Estonija i Emirati nisu analizirani u okviru prethodna dva indikatora, što ukazuje na mnogo bolju poziciju u prosečnom broju nano-tehnoloških citata nego u ostala dva indikatora. Posebnu pažnju izazivaju Estonija i Emirati (UAE) kao zemlje koje su visoko pozicionirane u kvalitetu nano-naučnih istraživanja.

Tabela 2: Uporedni pregled pozicija (ranga) posmatranih zemalja prema posmatranim indikatorima u periodu 2008-2017.

| rang | zemlje u nano-tehnološkim publikacijama | rang | zemlje u nano-tehnološkim citatima | rang | zemlje u prosečnim nano-tehnološkim citatima |
|---|---|------|------------------------------------|------|--|
| Prva grupa zemalja – najaktivnije zemlje u nano-tehnologiji | | | | | |
| 1 | Kina | 1 | SAD | 1 | Singapur ++ |
| 2 | SAD | 2 | Kina | | |
| Druga grupa zemalja – više aktivne zemlje u nano-tehnologiji | | | | | |
| 3 | Indija | 3 | Nemačka + | 2 | Švajcarska ++ |
| 4 | Nemačka | 4 | Japan + | 3 | SAD -- |
| 5 | J. Koreja | 5 | J. Koreja = | 4 | Holandija ++ |
| 6 | Japan | 6 | Indija - | 5 | Australija ++ |
| 7 | Francuska | 7 | V. Britanija + | 6 | Danska ! |
| 8 | Iran | 8 | Francuska - | 7 | Irska ! |
| 9 | V. Britanija | 9 | Španija + | 8 | V. Britanija = |
| 10 | Rusija | 10 | Singapur + | 9 | Švedska ++ |
| 11 | Španija | 11 | Italija + | 10 | Ujedinjeni Arapski Emirati ! |

| | | | | | |
|----|------------|----|--------------|----|---------------|
| 12 | Italija | 12 | Australija + | 11 | Nemačka -- |
| 13 | Tajvan | 13 | Kanada + | 12 | Kanada = |
| 14 | Kanada | 14 | Iran - | 13 | Estonija ! |
| 15 | Australija | 15 | Tajvan - | 14 | Belgija ++ |
| 16 | Singapur | 16 | Švajcarska + | 15 | S. Arabija ++ |
| 17 | Brazil | 17 | Holandija + | 16 | Austrija ! |
| 18 | Poljska | 18 | Švedska + | 17 | Finska ! |
| 19 | Švajcarska | 19 | Rusija - | 18 | Španija -- |
| 20 | Holandija | 20 | Belgija + | | |
| 21 | Turska | 21 | S. Arabija + | | |
| 22 | S. Arabija | 22 | Brazil - | | |
| 23 | Švedska | 23 | Poljska - | | |
| 24 | Malezija | 24 | Turska - | | |
| 25 | Belgija | | | | |

- + bolji rang u nano-tehnološkim citatima nego u nano-tehnološkim publikacijama
- lošiji rang u nano-tehnološkim citatima nego u nano-tehnološkim publikacijama
- ++ bolji rang u prosečnom broju citata u odnosu na ostala dva indikatora
- lošiji rang u prosečnom broju citata u odnosu na ostala dva indikatora
- = ujednačen rang
- ! zemlje koje nisu pozicionirane prema prva dva indikatora u prvih 25 zemalja

ZAKLJUČAK

Na osnovu podataka o broju nano-tehnoloških publikacija, njihovom broju ukupnih i prosečnih citata koje objavljuje Statnano (izvor: WoS baza) u ovom radu su predstavljene konkurentske pozicije zemalja u nano-tehnološkoj aktivnosti i njihova diferentnost u periodu 2008-2017. godina prema navedenim indikatorima. Zemlje su podeljene u dve grupe. Kina i SAD su izdvojene u posebnu grupu, jer imaju teško dostižnu diferentnost u odnosu na sve ostale zemlje koje su aktivne u nano-nauci i nano-tehnologiji (izuzev u prosečnim citatima). Ovo je utvrđeno u većem broju studija, što se potvrđuje i kroz analizu u ovom radu.

Rezultati analize potvrđuju kinesku diferentnost u odnosu na SAD, prema broju nano-tehnoloških publikacija. Izražena diferentnost Kine, prema ovom indikatoru i u odnosu na ostale zemlje u savremenim uslovima nije sporna. Ali, njena diferentnost u odnosu na SAD, prema broju nano-tehnoloških citata koju ostvaruje od 2012. godine, je manja u odnosu na diferentnost koju ostvaruje prema broju nano-tehnoloških publikacija od 2008 godine. Kada je u pitanju kvalitet njenih publikacija, meren prosečnim brojem citata, Kina nije pozicionirana u zemlje koje su kvalifikovane kao najaktivnije i više aktivne. Kineski autori ulažu napore u podizanje kvaliteta nano-istraživanja kako bi povećali (prosečan) broj citata, na šta ukazuje njena pozicija od 2016. godine.

Međusobna diferentnost zemalja u drugoj grupi, prema broju nano-tehnoloških publikacija i citata, je manja u poređenju sa međusobnom diferentnošću zemalja prve grupe (SAD i Kine). Singapur izražava diferentnost u odnosu na ostale zemlje u grupi prema prosečnom broju citata.

Posmatrano prema ukupnom broju nano-tehnoloških publikacija, u periodu 2008-2017. godina uočava se poziciona prednost Indije u odnosu na Južnu Koreju, Nemačku i Japan. Iran se pozicionira među prvih pet u grupi od 2014. godine, i ugrožava poziciju Južne Koreje 2017. godine (drugi je u grupi). Saudijska Arabija i Rusija se izdvajaju od drugih zemalja po povoljnijem pozicioniranju u vremenu. Posmatrano prema ukupnom broju nano-tehnoloških citata, Nemačka, Južna Koreja, Japan, Indija, Velika Britanija i Francuska su, kao zemlje gornjeg segmenta, međusobno više diferentne nego što su ostale zemlje u donjem segmentu grupe. Diferentnu prednost Nemačke smanjuje Južna Koreja od 2010. koja postaje druga u

grupi u 2011. godini, ali i Indija od 2013. koja preuzima vođstvo u 2016. Posmatrajući donji segment uočava se povoljnije pozicioniranje Irana i Saudijske Arabije. Iran beleži drugo mesto u 2017. Međutim, Iran ne beleži takav rezultat u prosečnim citatima. Tokom čitavog perioda samo Singapur ima značajnu diferentnost u prosečnim citatima. Njemu se pridružuje Švajcarska i nešto skromnije SAD. Zapaža se kontinualni rast prosečnih citata Saudijske Arabije i njeno povoljno repozicioniranje.

Može se zaključiti da je period 2008-2017. godina zapljusnut novim talasom povoljnog pozicioniranja zemalja, od kojih su neke do skoro bile manje aktivne u nano-tehnologiji. One kontinualno stvaraju diferentnost pozicije u odnosu na najbliže konkurente. Neke od njih to čine pre u kvalitetu nego u kvantitetu nano-tehnološke aktivnosti.

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ZASTUPLJENOST EKOLOŠKOG MENADŽMENTA U SISTEMU OBRAZOVANJA I VASPITANJA REPUBLIKE SRBIJE

THE FREQUENCY OF USING ECOLOGICAL MANAGEMENT IN THE EDUCATION AND RESEARCH SYSTEM OF THE REPUBLIC OF SERBIA

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Sadržaj: *Danas, kao nikada pre, narušena je stabilnost ekologije planete Zemlje i to zahvaljujući aktivnostima koje sprovodi ljudska vrsta. Ekološko obrazovanje objedinjuje znanja, vrednosti i stavove i ima za cilj odgovorno ponašanje prema životnoj sredini. Postavlja se pitanje: kada i na koji način početi sa ekološkim obrazovanjem i vaspitanjem dece? Rezultate istraživanja sprovedenog na populaciji uzorka studenata Učiteljskog fakulteta, o nužnosti edukacije dece, prikazaćemo u ovom radu.*

Ključne reči: *ekologija, ekološki menadžment, ekološko vaspitanje i obrazovanje.*

Abstract: *Today, as never before, the stability of Earth's ecology is undermined, thanks to the activities carried out by the human species. Ecological education brings together knowledge, values and attitudes and has a responsible behavior towards the environment. The question arises, when and how to start educating children about ecology? The results of the research carried out on the sample population of the students of the Faculty of Teacher Education, on the necessity of education of children, will be presented in this paper.*

Keywords: *ecology, ecological management, ecological education and education.*

1. UVOD

Obrazovanje, kao ljudsko pravo, predstavlja preduslov za dostizanje održivog razvoja i esencijalni alat za dobro upravljanje, donošenje odluka i promociju demokratije. Stoga, obrazovanje iz oblasti ekološkog menadžmenta razvija i jača kapacitete individua, grupa, društava, organizacija i zemalja da donose sudove i izbore u korist održivog razvoja [1].

Čovek je taj, ko je izazvao promene i ugrozio životnu sredinu. Zar u „biti” svake nauke nije čovek? Sve je podređeno njegovom prosperitetu, boljem i zdravijem životu. Priroda je skup različitih resursa koje čovek eksploatiše, menja i prilagođava svojim potrebama [2].

Potreba za edukacijom stanovništva o imperativu zaštite životne sredine, i svim strukturnim područjima ekologije kao biološke discipline, predstavlja fundamentalni cilj obrazovanja i

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vaspitanja. Postavlja se pitanje: kada i u kom obliku početi sa procesom edukacije osnovnih načela ekološkog vaspitanja i obrazovanja?

Na osnovu Zakona osnovnom obrazovanju i vaspitanju [3], u delu Zadaci nastave fizičkog vaspitanja, u stavu 7. stoji: „Sticanje i razvijanje svesti o potrebi zdravlja, čuvanja zdravlja i zaštite prirode i čovekove sredine” [3]. Danas se većina naučnika slaže da se sa formiranjem ekološkog načina mišljenja i svesti o zaštiti životne sredine, odnosno da sa ekološkim vaspitanjem i obrazovanjem treba započeti još kod dece na najranijem predškolskom uzrastu.

„Zakoni prirode” nisu ukinuti, samo su se njihov stepen složenosti i kvantitativni odnosi učesnika promenili usled povećanja brojnosti ljudske populacije i povećanja čovekove moći da promeni okruženje.

Ekologija je nauka koja proučava odnose organizama i njihovog okruženja kao i međusobne odnose između samih organizama [4]. Pored tradicionalnog pristupa definisanju ekologije, savremeni pristup definisanja stavlja čoveka i zdravlje u korpus zaštite životne sredine kao njen fundamentalni činilac. Ovaj pristup definiše ekologiju kao nauku koja ima za cilj prevenciju čovekovog zdravlja i zaštitu životne sredine, uz tendenciju održivog razvoja prirode i njenih resursa u skladu sa zakonitostima koje čovek prilagođava potrebama civilizacije. Značajan problem savremenog sveta je kako i kojim sredstvima potpomoći permanentnom održanju stanja zdravlja, a time i ljudskih životnih i radnih sposobnosti. Kako se u radnoj praksi sve više ističe značaj kinezioloških stimulusa kao vrlo efikasnog preventivnog sredstva, to se sve više nameće i pitanje stalnog istraživanja i dokazivanja efekata u cilju jačanja zdravlja, radnih i odbrambenih sposobnosti, što ljude u suštini čini da su srećniji i zadovoljniji [2].

Na osnovu Zakona o zaštiti životne sredine životna sredina jeste skup prirodnih i stvorenih vrednosti čiji kompleksni međusobni odnosi čine okruženje, odnosno prostor i uslove za život [5].

Ekološki menadžment predstavlja jednu od savremenih formulacija koja se sve više i češće upotrebljava. U engleskoj literaturi nailazi se na dva pojma *environmental management* i *ecological management*. Pojam menadžment ili upravljanje u životnoj sredini najčešće se vezuje za upravljanje u rešavanju nekih konkretnih problema u vezi sa životnom sredinom u nekoj oblasti (otpad, vode, vazduh) pa se tako govori o upravljanju otpadom, upravljanju vodama, itd. [6]. Ekološki menadžment se odnosi na ekološko planiranje, a njegov fokus je na implementaciji, monitoringu, proveravanju i kontroli, kao i na praktičnom suočavanju sa problematikom realnih svetskih ciljeva u pogledu očuvanja životne sredine, kao što je npr. modifikovanje ljudskih navika, koje negativno utiču na prirodu, mnogo više nego na teoretskom planiranju [1]. Zadatak ekološkog menadžmenta je da koordinira i fokusira „dobre” razvoje sa stanovišta životne sredine, poboljšava dobrobit ljudi, te ublažava ili sprečava dalja zagađenje planete Zemlje i uništavanje njenih organizama [1].

Postoji više ciljeva ekološkog menadžmenta, ali su dva posebno važna:

1. opšti ciljevi vezani za zaštitu životne sredine kao što su održivi razvoj, pravo čoveka na zdravu životnu sredinu, kvalitet života, opstanak ekosistema, itd.
2. konkretniji ciljevi pojedinih subjekata privređivanja vezanih pre svega za samu suštinu tržišnog privređivanja–ostvarenje profita [7].

Zaštita životne sredine se u ni jednom modelu ne može posmatrati izolovano kao nečiji nacionalni ili teritorijalni problem. Ona je globalnog karaktera i kao takva predstavlja izazov

za celo čovečanstvo. Zagađenom vazduhu ne možete narediti da ne prelazi državnu granicu niti međunarodnoj reci saopštiti da ne protiče koritom kroz sve zemlje kojima vekovima teče [8]. Ovakve pojave za sobom povlače i konstataciju da je neophodna i jedinstvena edukacija kroz sistem obrazovanja i vaspitanja o ekološkom menadžmentu, na globalnom svetskom nivou.

Kako se u svetu veliki značaj pridaje zaštiti životne sredine na svim nivoima obrazovanja i vaspitanja, neophodno je upoznati se sa situacijom i pravcima delovanja u sistemu obrazovanja u Republici Srbiji.

U ovom radu će biti predstavljeni rezultati sprovedenog istraživanja kod populacije studenata razredne nastave o njihovim ocenama i stavovima o nužnosti njihove edukacije iz oblasti ekološkog menadžmenta i ekološkog vaspitanja i obrazovanja dece školskog uzrasta. Iz tog razloga sprovedena je anketa među studentskom populacijom budućih profesora razredne nastave (studenti 4. godine osnovnih i master akademskih studija Učiteljskog fakulteta Educons univerziteta) u školskoj 2017/18. godini.

2. METODOLOGIJA ISTRAŽIVANJA

Ciljevi i zadaci istraživanja su:

1. utvrditi nivo stečenog znanja budućih učitelja iz oblasti ekološkog menadžmenta kroz vaspitno-obrazovni proces tokom srednjeg i visokoškolskog obrazovanja;
2. utvrditi mišljenje budućih učitelja o nivo stečenog znanja iz oblasti ekološkog vaspitanja kroz vaspitno-obrazovni proces tokom 1. ciklusa osnovne škole (1 - 4 razred), kao i stepen zastupljenosti izbornog predmeta „Čuvari prirode“;
3. utvrditi stavove ispitanika o uvođenju obaveznog predmeta Ekološko vaspitanje u osnovnim školama.

Hipoteze istraživanja: generalna hipoteza (H) je definisana i glasi: Postoji nužnost uvođenja predmeta Ekološko vaspitanje u plan i program osnovne škole, počev od 1. razreda.

Parcijalne hipoteze (izvedene iz generalne) su: H1-Nivo znanja o Ekološkom menadžmentu stečen kroz sistem obrazovanja školske omladine nije dovoljan i postoji želja za njegovim unapređenjem.

Primenjena metodologija: za prikupljanje podataka i testiranje hipoteza, konstruisan je anketni list koji je sadržao 15 pitanja, od kojih su prvih 5 strukturne prirode, a preostalih deset vezani za testiranje postavljenih hipoteza. Anketiranje je sprovedeno tokom nastave (vežbi) sa studentima Učiteljskog fakulteta univerziteta Educons Sremska Kamenica.

Obrada podataka je urađena statistički i predstavljena grafikonima, kroz distribuciju frekvencija svih testiranih varijabli neophodnih za testiranje hipoteza.

3. REZULTATI ISTRAŽIVANJA

Zakon o osnovnom obrazovanju i vaspitanju Republike Srbije, u poglavlju Ciljevi i ishodi osnovnog obrazovanja i vaspitanja, pod tačkama 10. i 11. kaže: „Razvoj i praktikovanje zdravog načina života, svesti o važnosti sopstvenog zdravlja i bezbednosti, potrebe negovanja i razvoja fizičkih sposobnosti”, kao i „razvoj svesti o značaju održivog razvoja, zaštite i očuvanja prirode i životne sredine, ekološke etike i zaštite životinja” [3]. U Zakonu se dalje navodi u članu 27. (Školski programi), da školski program sadrži, između ostalih komponenti, i Program zaštite životne sredine, a u članu 46. istog Zakona, dat je opis Zaštite životne sredine, i navodi se

sledeće: „Zaštita životne sredine obuhvata aktivnosti usmerene na razvoj ekološke svesti, kao i očuvanje prirodnih resursa. Očuvanje prirodnih resursa iz stava 1. ovog člana obuhvata i upoznavanje sa korišćenjem i racionalnom upotrebom tih resursa u oblasti energetike. Škola doprinosi zaštiti životne sredine ostvarivanjem programa zaštite životne sredine - lokalnim ekološkim akcijama, zajedničkim aktivnostima škole, roditelja, odnosno staratelja i jedinice lokalne samouprave u analizi stanja životne sredine i akcija za zaštitu životne sredine u skladu sa zakonom” [3].

Zakonodavac propisuje dva ciklusa obrazovanja u osnovnoj školi, i to prvi ciklus od 1. – 4. og razreda i drugi od 5. – 8. og razreda, a kao oblike nastave predviđa: redovnu, dopunsku, dodatnu i pripremnu nastavu. Kada su nastavni predmeti u pitanju, mogući su oblici obaveznih, izbornih i fakultativnih predmeta. Izborni i fakultativni predmeti se po pravilu izvode kao predmetna nastava pod vođstvom specijalizovanih nastavnika za tu oblast.

U prvom ciklusu osnovnoškolskog obrazovanja i vaspitanja (od 1. - 4. razreda) u Republici Srbiji predviđena je izborna nastava kroz dva oblika i to: obavezni izborni predmeti (Građansko vaspitanje i Verska nastava) izborom jednog od dva ponuđena izborna predmeta i izborna nastava u okviru koje su ponuđena četiri izborna predmeta i to: Narodna tradicija, Čuvari prirode, Od igračke do računara i Ruke u testu. Ocenjivanje kod izbornih predmeta je opisno [9].

Na osnovu analiziranog sadržaja Zakona o osnovnom obrazovanju i vaspitanju RS, izvodi se zaključak da je edukacija o ekološkom vaspitanju dostupna i moguća kroz izbornu nastavu u nižim razredima (1. ciklus) tokom vaspitno-obrazovnog procesa.

Na formiranje ekološke svesti kod dece školskog uzrasta najvažniju ulogu imaju učitelji, kao organizatori i realizatori vaspitno-obrazovnog procesa. Da bi učitelj osećao potrebu da svojim angažovanjem utiče na formiranje ekološke svesti kod dece mora biti ne samo zainteresovan za zaštitu životne sredine, već i da je dobro poznaje.

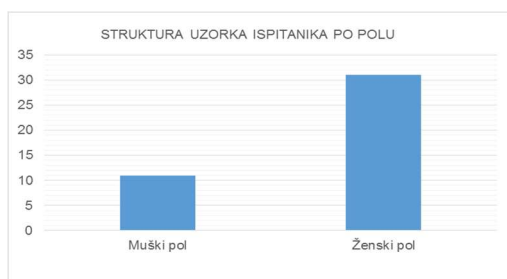
Preduslov kvalitetne edukacije iz oblasti ekološkog menadžmenta je dobra obučenosť učitelja, ne samo u metodičkom, već i u stručno-ekološkom smislu. Na taj način ekološki-stručno edukovani učitelji postaju prvi realizatori sadržaja iz oblasti ekološkog menadžmenta i predstavljaju važan činilac ekološkog vaspitanja i obrazovanja dece školskog uzrasta.

Zbog toga se s pravom postavlja pitanje koliko su se učitelji tokom svog školovanja na osnovnim i master akademskim studijama susreli sa nekim vidom obrazovanja iz oblasti ekološkog menadžmenta i koliko su stručno osposobljeni da sprovedu vaspitno-obrazovni rad iz navedene oblasti. Na osnovu sprovedenog istraživanja testiranjem studenata Učiteljskog fakulteta dobijeni su sledeći rezultati.

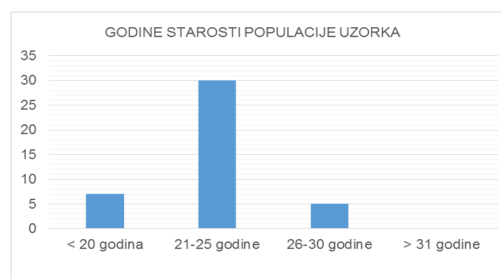
Na osnovu analize strukturnih varijabli koje predstavljaju populaciju uzorka ispitanika (1 – 5 anketno pitanje) utvrđeno je sledeće:

- uzorak ispitanika predstavljaju 31 osoba ženskog pola / studentkinja (74 %) i 11 osoba muškog pola / studenata (26 %) (grafikon 1),
- starosna dob uzorka je: 7 ispitanika imaju do 20 godina, (17 %), 30 ispitanika imaju od 21-25 godina (71 %), 5 ispitanika imaju od 26-30 godina (12%) i nema ispitanika preko 31 godine (0%) (grafikon 2),
- srednja stručna sprema uzorka je sledeća: 21 ispitanik je završilo gimnaziju (50%), 12 ispitanika ekonomsku (29%), 2 ispitanika tehničku (5%), 4 ispitanika medicinsku (10%), 2 ispitanika saobraćajnu (5%) i 1 ispitanik tekstilnu srednju školu (grafikon 3).

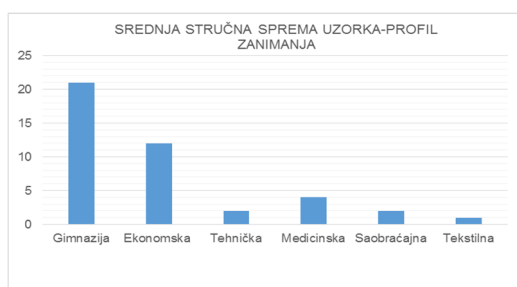
Grafikon 1. Struktura uzorka ispitanika po polu



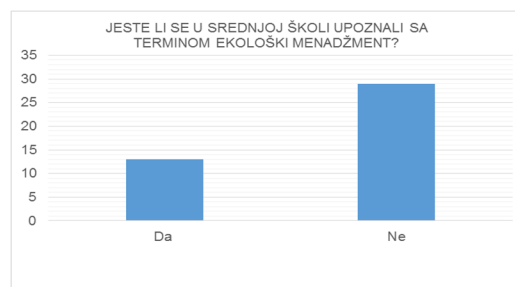
Grafikon 2. Godine starosti populacije uzorka



Grafikon 3. Srednja stručna sprema uzorka-profil zanimanja



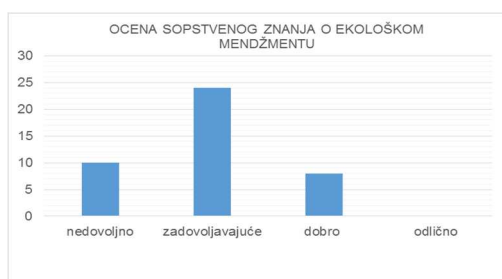
Grafikon 4. Jeste li se u srednjoj školi upoznali sa terminom ekološki menadžment?



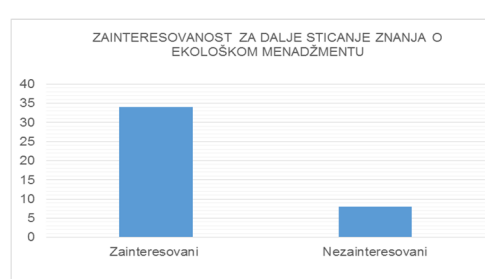
Na osnovu analize strukturalnih varijabli koje predstavljaju analizu znanja ispitanika iz oblasti ekološkog menadžmenta (6 – 8 anketno pitanje) utvrđeno je sledeće:

- po rezultatima istraživanja 31% (13 ispitanika) se u srednjoj školi upoznao sa terminom ekološki menadžment, dok ostatak od 69% (29 ispitanika) nije (grafikon 5),
- 24 ispitanika ocenjuje svoj nivo znanja iz oblasti ekološkog menadžmenta kao zadovoljavajući (57%, grafikon 5), ali su zainteresovani za sticanje novih znanja iz oblasti ekološkog menadžmenta 34 ispitanika (81%, grafikon 6).

Grafikon 5. Oцена sopstvenog znanja o ekološkom menadžmentu



Grafikon 6. Zainteresovanost za dalje sticanje znanja o ekološkom menadžmentu

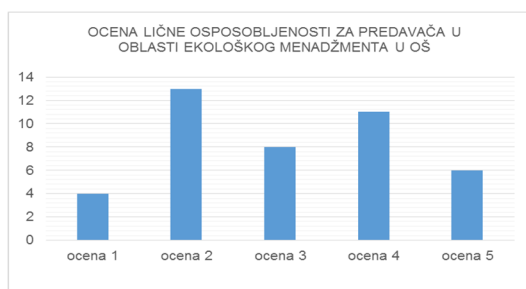


Na osnovu analize strukturalnih varijabli koje predstavljaju analizu osposobljenosti ispitanika da prenose znanja iz oblasti ekološkog menadžmenta i neophodnosti uvođenja predmeta iz oblasti ekološkog vaspitanja u nižim razredima osnovne škole (9 – 15 anketno pitanje) utvrđeno je sledeće:

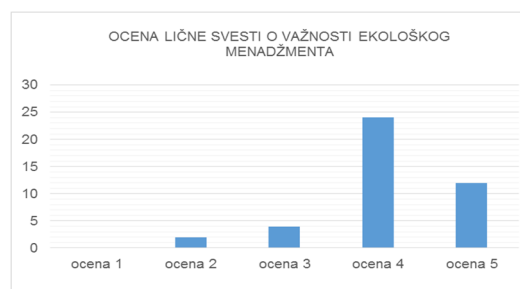
- s obzirom da ispitanici tokom studija na Učiteljskom fakultetu slušaju predmete iz oblasti zaštite životne sredine, rezultati istraživanja pokazuju da njih 25 (suma oцена 3, 4, 5) (60%) smatra da su osposobljeni za predavače u nižim razredima OŠ za oblast ekološkog menadžmenta (grafikon 7), a sva su svest o važnosti ekološkog menadžmenta

su ocenili ocenom 4 i 5 ukupno, 36 ispitanika (86%) (grafikon 8),

Grafikon 7. Ocena lične osposobljenosti za predavača u oblasti ekološkog menadžmenta u OŠ

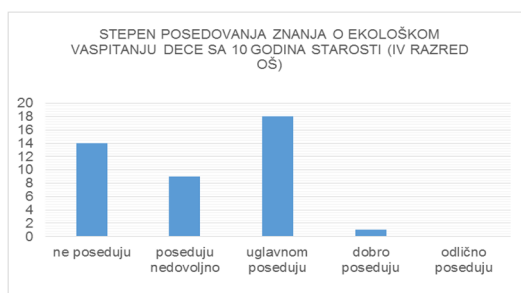


Grafikon 8. Ocena lične svesti o važnosti ekološkog menadžmenta

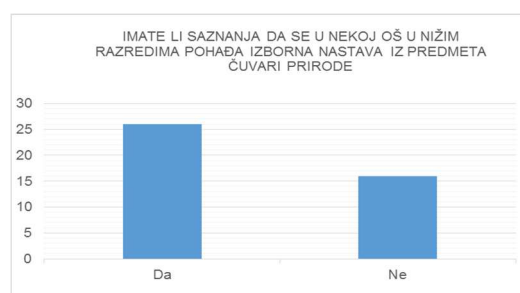


- istraživanjem je utvrđeno da dečaci u 1. ciklusu osnovnog obrazovanja poseduju nedovoljno znanje o zaštiti životne sredine (23 ispitanika, 55%), 18 ispitanika (43%) uglavnom poseduje (grafikon 9.), a saznanja da se u nekoj školi pohađa nastava iz izbornog predmeta „Čuvari prirode” ima 26 ispitanika (60%), dok 16 ispitanika (38%) nema takvih saznanja (grafikon 10),

Grafikon 9. Stepen posedovanja znanja o ekološkom vaspitanju dece sa 10 godina starosti (IV razred OŠ)

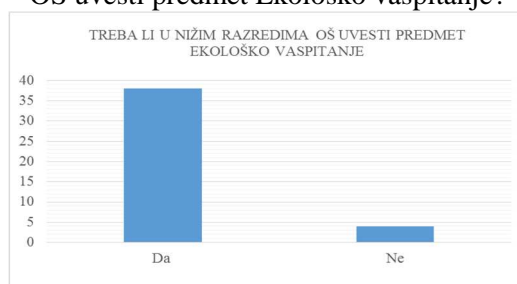


Grafikon 10. Imate li saznanja da se u nekoj OŠ u nižim razredima pohađa izborna nastava iz predmeta „Čuvari prirode”?



- testirajući varijable o uvođenju predmeta ekološko vaspitanje 90% ispitanika (38) smatra da takav predmet treba uvesti u redovnu nastavu, počev od nižih razreda OŠ.

Grafikon 11. Treba li u nižim razredima OŠ uvesti predmet Ekološko vaspitanje?



4. ZAKLJUČAK

Na osnovu sprovedenog istraživanja i testiranja varijabli relevantnih za testiranje hipoteza, zaključujemo sledeće:

- potvrđena je generalna hipoteza (H) koja glasi: “Postoji nužnost uvođenja redovnog predmeta Ekološko vaspitanje, počev od 1. razreda osnovne škole. Takođe se potvrđuje i parcijalna hipoteza (H1) i ona glasi: „Stepen stečenog znanja o ekološkom menadžmentu u toku školovanja omladine nije dovoljan i postoji želja za sticanjem većeg korpusa znanja iz ove oblasti”.

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OBEZBEĐENJE KVALITETA U VISOKOM OBRAZOVANJU U REPUBLICI MAKEDONIJI

PRODUCING QUALITY OF HIGH EDUCATION – CASE STUDY: REPUBLIC OF MACEDONIA

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Sadržaj: *Visoko obrazovanje je složen segment, faktor ekonomskog i društvenog razvoja. Ima doprinos za razvoj nauke, saradnje sa biznis sektorom i međunarodnu saradnju. Od vitalnog značaja za unapređenje kvaliteta je da bude obezbeđeno ocenjivanje faktora za odvijanje obrazovnih aktivnosti, kao i mišljenje o kvalitetu obrazovanja, programa i kadra.*

Kvalifikacije ljudi treba da odgovaraju potrebama tržišta rada, da se prate promene, koje traže nove pristupe u obrazovanju. Sa ciljem da se razvija visoko obrazovanje sprovede se aktivnosti i mere u nastavno-obrazovnim i naučno-istraživačkim delatnostima. Kvalitet se uspostavlja reformama u visokom obrazovanju.

Obezbeđenje kvaliteta u visokom obrazovanju uređuje se Zakonom o obrazovanju. U Republici Makedoniji 2018. godine donet je nov Zakon o obrazovanju koji je u funkciji: kvaliteta u obrazovanju, autonomiji univerziteta i akademskih sloboda, uslova i postupaka. Uređuje se sistem visokog obrazovanja, uslovi i odvijanje delatnosti. Mnoge aktivnosti i mere u visoko-obrazovnim institucijama su u funkciji kvaliteta u visokom obrazovanju u zemlji u saglasnosti sa evropskim i svetskim standardima, što garantuje poboljšanje kvaliteta rada. Republika Makedonija je ravnopravni član evropske porodice zemalja, koje se obavezuju da prate i realizuju preporuke Bolonjskog procesa i zajedničkog opredeljenja za kreiranje visokog obrazovanja.

Aktivnosti traže poštovanje standarda, kriterijuma i transparentnosti u radu. Za uspostavljanje kvaliteta u visokom obrazovanju koristi se međunarodni standard ISO/IEC9001. Primenuju ga zemlje potpisnice Bolonjske deklaracije. Merenje kvaliteta omogućava da se utvrdi varijabilitet, da se razotkriju i reše problemi i da se poboljša kvalitet. Treba da sadrži aktivnosti i mere u visoko-obrazovnim institucijama, predmeti da budu u saglasnosti sa potrebama privrede, da jača saradnja i da se stiče međunarodna akreditacija.

U toku je izrada strategije za razvoj najstarijeg univerziteta “Sv. Kiril i Metodij” u Skoplju za period 2019-2025. Cilj je kvalitetno ostvarivanje principa, misije, ciljeva, mera i aktivnosti visokog obrazovanja. Misija je kontinuirano obrazovanje kadra kvalitetnim programima.

Postavlja se pitanje da li se uspelo sa primenjenim merama u transformaciji našeg visoko obrazovnog sistema, kada se po kvalitetu ni jedan naš univerzitet ne nalazi među 1000 na Šangajskoj listi. Vrednost indikatora za obrazovanje je crveno svetlo za brzo delovanje. Da se ide napred potrebna su veća sredstva i aktivnosti.

U radu su korišćeni metodi: analiza, dedukcija, indukcija, sinteza, komparativna analiza i dr. Cilj rada je da se istaknu aktivnosti u funkciji obezbeđenja kvaliteta u visokom obrazovanju zemlje, kako bi bio poboljšan njegov rang na evropskom i svetskom obrazovnom nivou.

Očekujemo i u narednom periodu u procesu podizanja kvaliteta u visokom obrazovanju da budu rešeni problemi velikih potreba u kadru, da se povećaju sredstva za visoko obrazovanje, da

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budu sprovedene reforme, izmene u nastavnim programama i režimu studiranja, da jačaju prednosti, da se odstranjuju slabosti, da se unapređuju procesi povezani za kvalitet, da se razvija nauka i saradnja u zemlji i inostranstvu, da se ide napred a nikako unazad.

Ključne reči: *kvalitet, visoko obrazovanje, standardi, akreditacija, evaluacija, reforme, Republika Makedonija.*

Abstract: *High education is a complex segment, a factor for economic and social development. It contributes the development of science, the cooperation with the business sector and international cooperation. For improving the quality of high education, the evaluation of the education activities is of vital importance, as well as the education programmes and cadre. Work force qualification should match the needs of the labour market, to follow the needs, and to search for new approaches in the education. To develop high education there are activities and measures in the education process and research activities. The quality is implemented through reforms in the high education.*

Providing high education is possible by law of education. In the Republic of Macedonia in 2018 there is a new law of education that is in function, and covers quality of education, autonomy of the university and academic freedom and conditions for improving the quality of teaching. Republic of Macedonia is equal member of the European family countries that are following and implementing recommendations of the Bologna process.

The activities requires following the standards, criteria and transparency in work. For improving quality of high education there is international standard ISO/IEC9001. This standard is applied by the countries from Bologna declaration. Measuring the quality is possible by detecting variability, identifying and solving problems and improving quality. There should be activities that measure the processes in the high education institutions. The subjects should be designed according to the needs of the business sector. There should be better international cooperation and accreditation of the institutions.

A strategy for development of the Macedonians oldest university "St. Cyril and Methodius" is in progress. The aiming period is 2019-2025. The goal is quality in achieving the principles, mission, measures and activities of high education. The mission is to provide continuous education of the labour force.

The measures that were implemented until now didn't change much if you have in mind the fact that none of Macedonian universities is on the Shanghai list. The value of the indicator is a red light for the ongoing practice in the high education process, and to improve that there is a need of resources and activities.

Analyses, deduction, induction, synthesis, comparative analyses and other methods are used in this paper. The goal is to highlight the taken activities in function of achieving quality in high education and improving its ranking. We expect that in the following period the country should solve the problems with labour inefficiency, lacking of resources, designing and implementing reform, and improving the cooperation.

Keywords: *qualities, high education, standards, accreditation, evaluation, reforms, Republic of Macedonia*

1. UVOD

Zbog dinamike na tržištu rada kvalitet u visokom obrazovanju treba da se unapređuje. Potrebna je akreditacija programa, osavremenjivanje studijskih programa, njihovo rangiranje, promena profila studenata, kao i druge aktivnosti koje su od značaja za unapređenje kvaliteta u visokom obrazovanju.

U zemlji funkcionišu državni i privatni fakulteti. Visoko obrazovanje se zasniva na: akademskoj slobodi, autonomiji, akademskom integritetu, jedinstvenosti, otvorenosti prema javnosti i usklađivanju sa evropskim sistemom. Unapređuje se akademska mobilnost nastavnog osoblja i studenata. Studenti učestvuju u upravljanju i obezbeđuju kvalitet i efikasnost studiranja. Ostvaruju se promene, rešavaju se problemi potreba za visokokvalifikovanim stručnjacima, sprovede se reforme, prave se izmene u nastavnim programima i u režimu studija. Važnost Bolonjskog procesa je osiguranje kvaliteta i povećanje međunarodne konkurentnosti evropskog sistema visokog obrazovanja.

Na kvalitet u visokom obrazovanju doprinosi i novi Zakon o visokom obrazovanju (2018. godine). Fokus je na autonomiji univerziteta i akademskim slobodama, uslovi i postupci za osnivanje i prestanak visokoobrazovne ustanove, sistem za obezbeđivanje kvaliteta u visoko-obrazovnoj ustanovi, koji su osnova za organizaciju, upravljanje, mobilnost nastavnog kadra i studenata, učešće studenata u upravljanju, efikasnost studiranja, razvoj i finansiranje visoko-obrazovne ustanove.

Razvoj kadrova je osnova za privredni i društveni razvoj, za demografske procese, izmene u reproduktivnom ponašanju i migracijama stanovništva. Zato je kvalitet visokog obrazovanja i njegova pozicija blagostanje zemlje i smatra se kao put po kome ekonomski razvoj treba da se kreće u budućnosti. (Bilbilovska G, 2006, str. 80)

Na godišnjem sastanku MMF i IBRD u Indoneziji indeks ljudskog kapitala Makedonije bio je najniže rangiran. To je alarm da se radi na reformama u obrazovanju, većim investicijama, na promenama u nastavnim programima, na njihovom usaglašavanju sa nastavnim programima razvijenih univerziteta u Evropi i u svetu, kao i njihovoj saradnji.

2. VISOKO OBRAZOVANJE U REPUBLICI MAKEDONIJI

U našoj zemlji u predratnom periodu ponašanje pojedinaca bilo je određivano tradicijama. U posleratnom periodu radilo se na razvoju srednjih škola i na produženju obrazovanja u visoko-obrazovnim institucijama. Po popisu iz 2002. godine procenat nepismenog stanovništva iznosio je 4,2%, sa nezavršenim osnovnim obrazovanjem bilo je 13,8%, sa završenim osnovnim obrazovanjem 35,1%, sa srednjim obrazovanjem 36,9%, a visoko obrazovanje je imalo 6,8% ili 108933 stanovnika. (Bilbilovska G, 2006, str. 79). Ostvarene su promene, proširena je mreža visoko-obrazovnih ustanova i visokih škola, sprovedene su izmene u nastavnim programima i u režimu studiranja, povećan je broj lica sa višim i visokim obrazovanjem. Tako je 2011/12. godine bilo je 115 fakulteta, broj studenata bio je 56873, a broj nastavnika 2144, da bi 2015/16. bilo 126 fakulteta sa brojem studenata 58896, i brojem nastavnika 2716. (DZS, 2017 str.199). Po najnovijim podacima iz 2017/18. godine postoji 136 fakulteta, sa brojem studenata 56006, a broj nastavnika je 2891. (DZS: 2018, str. 902)

Broj diplomiranih studenata je pokazatelj obrazovne politike u domenu visokog obrazovanja. U 2013. godini diplomiralo je 9480 studenata, od kojih 4143 su muškog i 5337 ženskog pola, a

2016. godine diplomiralo je 8247 studenata od kojih 4787 ženskog pola i 3460 muškog pola. 2016. godine doktoriralo je 197, magistriralo 1881, a specijaliziralo 140 kandidata. (DZS: 2017, str. 241). Na državnim visoko-obrazovnim institucijama nastavni kadar 2016. godine bio je na univerzitetima: Sv. Kiril i Metodij - 1838, na univerzitetu "Sv. Kliment Ohridski" Bitolj - 308, na univerzitetu "Goce Delčev" - 344, na univerzitetu za Informatičke nauke i tehnologiju "Sv. Apostol Pavle" Ohrid - 30, na državnom univerzitetu u Tetovu - 771 i na verskom fakultetu - 33. (DZS: 2017, str. 208).

Republika Makedonija je član evropske porodice zemalja, koje prate i realizuju preporuke Bolonjskog procesa i zajedničkog opredeljenja za kreiranje visokog obrazovanja, a koje se odnose na reforme u visokom obrazovanju. Uveden je bodovni sistem ECTS, kao i studentska mobilnost. Evropska saradnja je u funkciji osiguranja kvaliteta razvojem kriterijuma i metodologije za podizanje kvaliteta studija u razvoju nastavnih programa, njihovoj efikasnosti. Zatim, visoko obrazovanje se usmerava na strukturnu organizaciju i transparentno dizajniranje, konkurentno, kompatibilno i prepoznatljivo u obezbeđivanju kvaliteta i efikasnosti studiranja. U visokom obrazovanju neophodna je saradnja ustanova, a standardizacija obezbeđuje ujednačavanje kvaliteta institucija i studijskih programa za podizanje nivoa njihovog kvaliteta. Predlažu se i mere za unapređenje kvaliteta. Kontinuirano ocenjivanje olakšava ocenjivanje i proces studiranja. Podizanjem nivoa nastave omogućava se veća mobilnost studenata i profesora. Zaživeli su procesi akreditacije i evaluacije. Vršiti se anketiranje studenata za kvalitet nastave na svim nivoima (anketa je anonimna). Tendencija univerziteta je studenti da budu zreli, nezavisni, osposobljeni da se usavršavaju. Postoji internacionalizacija u nastavi preko studijskih gostovanja u inostranstvu, kursevi, specijalističke, postdiplomske studije.

Formirana je Agencija za kvalitet visokog obrazovanja, sa dva razdvojena organa: odbor za akreditaciju i odbor za evaluaciju. Akreditacija se zasniva na evaluaciji programa i institucije. Kvalitet treba da se razvija i poboljšava, da se ostvaruje vizija i misija fakulteta.

3. KVALITET U VISOKOM OBRAZOVANJU U REPUBLICI MAKEDONIJI

Kvalitet u visokom obrazovanju je višedimenzionalan i dinamičan, sa promenama, raznovrsnostima novih sadržina i aktivnosti. Definiše se kao koncepcija, orijentacija, sadrži karakteristike jednog procesa, sa nastojanjem da budu ostvareni ciljevi u visokom obrazovanju. Izražava karakteristike koje zadovoljavaju određene uslove da bi se ostvario kvalitet visoko-obrazovne ustanove. Označava sistem vrednosti i odnosa, kao i novu kulturu u radu i razvoju, a izražava kvalitet: nastavno-naučnog kadra, akademskih programa, studenata, opreme, prostora, metode ostvarivanja nastave, provere znanja, motivaciju, finansije i dr. Potrebne su promene, primena novih metoda u funkciji poboljšanja kvaliteta u svim procesima rada, motivacija, kao vredan resurs institucije. Odgovornost fakulteta je da razvija saradnju sa ostalim visoko-obrazovnim institucijama u zemlji i inostranstvu, tj. otvorenu i kontinuiranu aktivnost u funkciji kvaliteta u visokom obrazovanju. Sprovode se aktivnosti i mere u visoko-obrazovnim ustanovama, da bi bili stvoreni kadrovi sposobni da obavljaju odgovoran rad, a pri tome da budu poštovana pravila za regulisanje aktivnosti.

Kvalitet i saradnja u visoko-obrazovnim ustanovama zavise od standarda, kriterijuma za kvalitet i transparentnosti u radu. Međunarodna organizacija za standardizaciju ISO daje objašnjenje za: kvalitet, obezbeđenje kvaliteta, standard, kriterijume, studijske programe, kompatibilnost i evaluaciju.

Upravljanje kvalitetom u visokom obrazovanju je komplementarna aktivnost sa drugim aktivnostima u instituciji, efikasan način za integrisanje, harmonizaciju, realizaciju u svim domenima rada i izvan obrazovne institucije. On je deo strategije na najvišem nivou i angažuje zaposlene u instituciji, a silu crpi na tržištu rada. Evropska dimenzija kvaliteta obuhvata Bolonjski proces koji se temelji na standardima i smernicama za kvalitet u svim aspektima visokog obrazovanja u Evropi. Osnova mu je prepoznatljiv i komparativni nivo, ECTS bodovanje, mobilnost studenata, uključivanje studenata u vrednovanje kvaliteta profesora koji učestvuju u anketi, kada se prikupljaju informacije za više pitanja, a zatim se analiziraju njihovi odgovori vezani za kvalitet nastavno-obrazovnog procesa. Kvalitet u visokom obrazovanju se ostvaruje reformama i uvođenjem akreditacije, koja se smatra za multidimenzionalnu koncepciju, jer obuhvata sve funkcije i aktivnosti akademskih programa, istraživanja, studente, opremu i okruženje.

Skupština je na 45. sednici donela Zakon o visokom obrazovanju koji obezbeđuje kvalitet u visokom obrazovanju, i koji traži: autonomiju univerziteta, aktuelnu slobodu, uslove i postupke za osnivanje, statusne promene, prestanak visoko-obrazovne ustanove, njihovu delatnost, sistem za obezbeđivanje i ocenu kvaliteta visoko-obrazovne ustanove, organizaciju, upravljanje, razvoj i finansiranje visoko-obrazovne ustanove, prava i obaveze studenata, priznavanje, kvalifikaciju i nadzor nad radom visoko-obrazovne ustanove kao i druge aktivnosti koje obezbeđuju kvalitet u duhu nastavno-obrazovne i naučne oblasti, a u sklopu evropskih standarda za visoko obrazovanje. Kvalitet se obezbeđuje aktivnostima i merama u visoko-obrazovnim institucijama. Kriterijumi treba da utvrde karakteristike koje zadovoljavaju određene uslove u pogledu kvaliteta, odnosno odstupanja karakteristika od onoga što definiše standard za kvalitet. Potrebna je kompatibilnost nastavnih programa, usaglašenost studijskih programa između visoko-obrazovnih institucija koje obrazuju kadar sa istom diplomom. Treba da se poštuju akti kojima se utvrđuju aktivnosti u nastavno-obrazovnoj i naučno-istraživačkoj aktivnosti.

Na evaluaciji se bazira formiranje mišljenja o kvalitetu u visoko-obrazovnoj instituciji, visoko-obrazovnom procesu, studijskim programima i akademskom kadru. Evaluacija može da bude unutrašnje ocenjivanje (samoevaluacija) na fakultetu, kada se uključuju i studenti, uspostavlja se mehanizam praćenja i proveravanja i javno objavljivanje rezultata. Spoljašanje ocenjivanje kvaliteta je kada se visoko-obrazovna ustanova globalno analizira, kada se meri, ocenjuje i proverava kvalitet, kao i kontrola kvaliteta u zemlji. Analiziraju se izveštaji za samoevaluaciju i za eksternu evaluaciju, stanje i dostignuća, a zatim se predlažu mere za unapređenje kvaliteta. Neophodno je da se jačaju prednosti, da se odstranjuju slabosti i unapređuju procesi povezani sa kvalitetom u visokom obrazovanju, razvoj nauke, saradnja sa biznis sektorom, međunarodna saradnja. Iako se kvalitet može pratiti različitim metodama, najveću primenu ima metoda rangiranja visoko-obrazovnih ustanova, na osnovu mišljenja korisnika, broja upisanih studenata, stručnosti nastavnog kadra.

No, najnovije informacije sa konferencije u Baliju pokazuju da od 157 zemalja rangiranih po obrazovanju, ni jedan naš univerzitet nije bio među 1000 na Šangajskoj listi. Nalazimo se na najnižem nivou, a bolje rezultate imaju: Kosovo, Grčka, Bosna i Hercegovina, Jermenija i dr. Ovo traži hitno delovanje, jer nam obrazovanje stagnira u odnosu na ostale zemlje. Iako su potrebne veće investicije za uspešnost visokog obrazovanja, sa poslednjim rebalansom budžeta u zemlji sredstva za obrazovanje su smanjena. Da bi se išlo napred, potrebna su mnogo veća sredstva i aktivnosti.

4. NEKE AKTIVNOSTI ZA OBEZBEĐENJE KVALITETA U VISOKOM OBRAZOVANJU U REPUBLICI MAKEDONIJI

Obezbeđivanje kvaliteta u visokom obrazovanju traži njegovo stalno utvrđivanje, putem različitih karakteristika koje zadovoljavaju uslove: nastavnog kadra, studenata, opreme, prostora, realizaciju nastave, proveru znanja, finansije i dr. Merenje kvaliteta omogućava da se utvrdi varijabilitet, da se razotkriju i reše problemi i da se obezbeđuje kvalitet postupcima za ocenu kvaliteta (koje zavise od finansija).

Aktivnosti za obezbeđivanje kvaliteta u visokom obrazovanju u našoj zemlji otpočinju od 1995. godine na univerzitetu "Sv.Kiril i Metodij", kada je bila organizovana radionica "Politika i promene u visokom obrazovanju u Republici Makedoniji", gde je tema bio kvalitet u visokom obrazovanju u Republici Makedoniji.

Sa programom TEMPUS Phare Evropske unije u transformaciji visokog obrazovanja u Republici Makedoniji u periodu 1997/99. godina, bilo je predviđeno uspostavljanje sistema za sopstveno ocenjivanje i obezbeđivanje kvaliteta na univerzitetima, a koje se zasniva na kriterijumu nastavnih programa, ocena profesora, zadovoljstva studenata. Tada je bio realizovan projekat "Sistem za obezbeđivanje kvaliteta u visokom obrazovanju Makedonije". Makedonija je bila uključena u Fare program za visoko obrazovanje zemalja Centralne i Istočne Evrope u projektu "Obezbeđivanje kvaliteta u visokom obrazovanju". (Dukovski, V. (2000), str. 49)

Za obezbeđivanje kvaliteta u visokom obrazovanju primenu nalazi međunarodni standard za kvalitet ISO/IEC 9001, u kome se definišu stroga pravila aktivnosti kojima se uspostavlja kvalitet u visokom obrazovanju (obezbeđuju željene karakteristike). Za unapređenje kvaliteta u visokom obrazovanju primenjuju ih zemlje potpisnice Bolonjske deklaracije. Na ministarskoj konferenciji u Bergenu 2005. godine, ministri za visoko obrazovanje prihvatili su standarde i smernice za osiguranje kvaliteta u Evropskim zemljama. Unutrašnje osiguranje kvaliteta je na fakultetima, a spoljnje se odnosi na definisanje ciljeva, zadataka, procedura i kriterijuma koje treba utvrditi. Odgovornost za kvalitet imaju akreditovane institucije.

Trebalo bi da se poštuje Zakon o visokom obrazovanju, koji sadrži pravilnik za formiranje visoko-obrazovne institucije i standarde za osnivanje visoko-obrazovne institucije, uputstva za ocenu kvaliteta visoko-obrazovne institucije i akademskog kadra u zemlji, uputstva za evaluaciju i evaluacione postupke na univerzitetima. Zakon predviđa: priznanje visoko-obrazovne institucije, procenu kvaliteta i vršenja delatnosti, upravljanje, finansiranje i druge aktivnosti i mehanizme kojima se razvija kvalitet u visoko-obrazovnim institucijama, garantuje poverenje i ispunjenje onog što odgovara potrebama za kvalitet. Cilj Zakona je kvalitet u visoko-obrazovnim ustanovama i autonomija univerziteta. Strategiji kvaliteta se posvećuje posebna pažnja. Za ispunjenje svog zadatka visoko-obrazovna institucija treba u svim segmentima da stvara uslove za realizaciju zadataka, a proverom treba da bude utvrđeno da li se ostvaruju planirane aktivnosti. Ako se utvrdi da se neke aktivnosti ne ostvaruju, treba utvrditi razloge i raditi na njihovoj korekciji. Kontinuirano treba da se ocenjuju faktori i da se proveravaju uslovi za ostvarivanje aktivnosti za poboljšanje kvaliteta.

U funkciji kvaliteta 2018. godine donet je Zakon o visokom obrazovanju, na kome se radilo od juna 2017 godine. Bile su formirane radne grupe u Ministarstvu za obrazovanje i nauku, a bili su uključeni i predstavnici svih zainteresovanih strana.

U sastavu visoko-obrazovne ustanove u sastavu univerziteta su: fakulteti, umetnička akademija, visoko-stručne škole i naučni instituti, ali mogu da budu i javne, privatno-javne, neprofitne ustanove i privatne ustanove, koje imaju autonomiju i zadatak da istražuju.

Ovim Zakonom početak akademske godine vraća se na 1. oktobar, letnji semestar počinje 15. februara, a završava se 31 maja. Postojeći studentski fakultetski parlament se transformiše u univerzitetsku, odnosno fakultetsku skupštinu kao telo univerziteta, a ne kao udruženje građana, kao što je bilo registrovano po prethodnom Zakonu o visokom obrazovanju. Fakultetska skupština se bira na neposrednim izborima i njeni članovi su predstavnici studenata koji su izabrani na slobodnim, fer i demokratskim izborima, a nakon toga oni biraju svoje predstavnike na nivou univerziteta. Sa novim studentskim organizacijama omogućava se da se čuje i glas studenata.

Formira se Agencija za kvalitet visokog obrazovanja, koja sadrži dva razdvojena organa: odbor za akreditaciju (koji odobrava studentske programe) i odbor za evaluaciju (koji kontroliše kvalitet odobrenih akreditovanih programa). Univerzitet će imati evaluaciju od strane stručnih komisija. Samoevaluaciju univerzitetskih jedinica na univerzitetu vrši komisija za samoevaluaciju na univerzitetu, komisija za samoevaluaciju jedinice, po uslovima određenim statutom na univerzitetu i statutom samostalne visokoobrazovne ustanove. Samoevaluacija uzima u obzir i ocenu studenata. Globalna ocena se utvrđuje na osnovu izveštaja za samoevaluaciju svih članica, u svim segmentima rada u visoko-obrazovnoj instituciji. Svake druge godine sprovodi se rangiranje svih univerziteta i visoko-obrazovnih ustanova u sastavu univerziteta. Rangiranje sprovodi pravno lice koje bira ministar. Ministarstvo je dužno, u roku od 8 dana po prijemu, da dostavi izveštaj o rezultatima rangiranja sa rang listom. Univerzitet ima svoju globalnu misiju za razvoj svih njegovih članica, sa ciljem da se bude evropski univerzitet. Za ostvarenje ovog cilja univerzitet primenjuje Bolonjsku deklaraciju. Prvi ciklus akademskih studija traje 4 godine i stiže se 240 EKTS kredita. Drugi ciklus traje jednu, odnosno 2 godine i stiže se 60 odnosno 120 EKTS kredita. Doktorske studije traju 3 godine i donose 180 EKTS kredita.

Kada se ocenjuju studijski programi potrebno je da se objasni način usvajanja studijskih programa na dodiplomskim i postdiplomskim studijama.

Pri izboru nastavno-naučnog kadra treba da se primenjuje Zakon o visokom obrazovanju i univerzitetski akti. Kvalitet se meri po broju objavljenih radova, kao i kvalitetu publikacija (gde su objavljeni). Trebalo bi da se oceni i kako nastavnik kreira nastavni program i sadržinu, koje metode primenjuje u nastavi i na ispitima, koju literaturu preporučuje, piše literaturu, savlađuje znanja, radi ili ne radi sa studentima, drži vežbe ili ih kontroliše kako se izvode.

Na osnovu Uputstva za samoevaluaciju fakulteta svaka visoko-obrazovna institucija sastavlja svoje uputstvo koje donosi nastavno-naučni savet fakulteta. Razlike postoje kao rezultat specifičnosti institucije: vreme trajanja studija, kriterijumi za izbor u naučna zvanja, broj članova komisije i drugo. Treba da se utvrdi da li studijski program odgovara standardima Evropske unije i da li je usaglašen sa svetskom praksom, tj. da li struktura programa omogućuje integraciju diplomiranih u obrazovne sisteme drugih zemalja.

Za ocenu kvaliteta visoko-obrazovne institucije i akademskog kadra u zemlji sprovodi se spoljna i unutrašnja evaluacija visoko-obrazovne institucije, kao i postupci za pripremu i sadržinu izveštaja i globalno ocenjivanje akademskog kadra. Ciljeve za kvalitet u visokom obrazovanju i njegovu autonomiju ispunjava i komisija za obrazovanje, nauku i sport.

Smanjuje se mandat rektorima i dekanima sa 4 na 3 godine. Novi model za izbor rektora je neposrednim glasanjem profesora na fakultetima i institutima za predložene kandidate. Dekani i rektori imaju manju moć i ona je decentralizovana na nastavno-naučni savet na fakultetima i na Senat. Menja se način njihovog izbora, a počinje se glasanjem profesora na fakultetima. Fakultetski savet se bira na neposrednim izborima na kojima učestvuju i predstavnici studenata izabrani na demokratskim izborima.

Univerzitetski Senat sačinjavaju predstavnici jedinica univerziteta, studenti - najmanje 15% od broja članova Senata. Rektor je član Senata, predstavlja i zastupa univerzitet u zemlji i inostranstvu.

Za ograničenje moći ministra za obrazovanje formira se Nacionalni savet za obrazovanje, nauku i istraživanje koji preuzima nadležnosti ministra u sferi visokog obrazovanja. Cilj Nacionalnog saveta je da prati razvoj visokog obrazovanja, da predlaže mere za unapređenje visokog obrazovanja, da utvrđuje standarde, veću kompatibilnost nacionalnih standarda sa standardima EU, doživotno učenje, stvaranje uslova za stvaranje i prenošenje znanja, jačanje kompetencije mladih i starijih za socijalnu inkluziju i participaciju, potpunu participaciju za ostvarenjem ideje za dobrobit, da budu stvoreni pravci za razvoj obrazovanja. Vizija je da se promovišu vrednosti obrazovanja i da se poboljšava kvalitet života u zemlji.

Obzirom da na univerzitetu nedostaje mlad kadar, na fakultetima se vraćaju asistenti i demonstratori, i uvode se kriterijumi za izbor demonstratora. Fakulteti mogu bez saglasnosti ministra da angažuju demonstratore, pa se tako omogućuje angažovanje mladih ljudi koji mogu da grade svoju akademsku karijeru.

Sa akademskom autonomijom garantuje se sloboda članova akademske zajednice. Visoko-obrazovne ustanove imaju pravo da pokrenu postupak pred nadležnim sudom za zaštitu autonomije univerziteta. Obezbeđuje se sloboda i dostojanstvo profesora i saradnika.

Univerzitetski profesori treba da objavljuju naučne radove u renomiranim publikacijama sa ipa faktorom, i da daju doprinos u razvoju kadrova koji doprinose razvoju zemlje.

Primenjuje se novi način upravljanja univerzitetom, kao i u rešavanju pitanja kvaliteta finansiranja u visokom obrazovanju. Traži se da se državni univerziteti reformišu preko demokratskog i transparentnog upravljanja. Studijski programi treba da odgovaraju tržištu rada, što trenutno nije slučaj.

Novi Zakon o visokom obrazovanju stvara obavezu državi da plaća režijske troškove za grejanje, struju, vodu i komunalnu higijenu. U toku je izrada Strategije za razvoj univerziteta "Sv. Kiril i Metodij" u Skoplju za period 2019-2025. godine. Kao najstariji univerzitet u Republici Makedoniji, "Sv. Kiril i Metodij" u Skoplju je stožer obrazovnog sistema, nauke i kulture. Cilj je kvalitetno ostvarivanje reformi u obrazovnom sistemu, misije univerziteta, motivisanost nastavnika, i da budu rešeni problemi velikih potreba u kadrovima. Za uspešnost visokog obrazovanja potrebne su veće investicije.

ZAKLJUČAK

U visokom obrazovanju ostvarene su promene, rešeni su problemi koji se odnose na potrebe za visokokvalifikovanim stručnjacima, proširena je mreža visoko-obrazovnih ustanova i visokih škola. Sprovedene su određene reforme u visokom obrazovanju, izmene u nastavnim programima i režimu studiranja. Povećan je broj lica sa višim i visokim obrazovanjem.

Od 2003. godine Makedonija je član evropske grupe zemalja koje se obavezuju da prate i realizuju preporuke Bolonjskog procesa i zajedničkog opredeljenja na jedinstvenom evropskom prostoru visokog obrazovanja. Aktivnosti i mere sprovode se u visoko-obrazovnim ustanovama za stvaranje visoko-obrazovanog kadra.

Kvalitet i saradnja u visoko-obrazovnim ustanovama zavise od standarda i kriterijuma za kvalitet. Međunarodna organizacija za standardizaciju ISO daje objašnjenje za: kvalitet, obezbeđenje kvaliteta, standard, kriterijume, studijske programe, kompatibilnost i evaluaciju. Pokazateljima se ocenjuje kvalitet, merenje kvaliteta, provera kvaliteta i kontrola kvaliteta. Potrebna je kompatibilnost nastavnih programa, usaglašenost studijskih programa između visoko-obrazovnih institucija koje obrazuju kadar sa istom diplomom. Treba da se poštuju akti kojima se utvrđuju aktivnosti u nastavno-obrazovnoj i naučno-istraživačkoj aktivnosti.

U funkciji kvaliteta u visokom obrazovanju, očuvanja autonomije i funkcionalnosti, 2018. godine donet je Zakon o visokom obrazovanju kojim se utvrđuje autonomija, aktuelne slobode, uslovi i postupci za osnivanje, statusne promene i prestanak visoko-obrazovne ustanove, njihova delatnost, sistem za obezbeđenje i ocenu kvaliteta u visoko-obrazovnoj ustanovi, organizaciju, upravljanje, razvoj i finansiranje visoko-obrazovne ustanove, prava i obaveze studenata, priznavanje kvalifikacija i nadzor rada u visoko-obrazovnoj ustanovi.

Na univerzitetu "Sv. Kiril i Metodij" u Skoplju za period 2019-2025. godine izrađuju se strategije za razvoj, a cilj su reforme za transformaciju visokog obrazovanja u funkciji ostvarivanja boljih rezultata, nikako stagnacija. Potrebne su veće investicije za uspešnost visokog obrazovanja u zemlji.

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DETECTING KEY WORDS FOR FUTURE BUSINESS SUCCESS – CASE STUDY IN EDUCATION

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Abstract: *Organizations seek to maintain different channels of communication. Those emerged channels – medias of information flow after a short period of functioning becomes obsolete and unclear. The expressed wishes are losing their scope. Such communication problem can be found in the case of educational organizations. The aim of the study is to map the coincidence between different messages issued and the real work scope. The selected organization in this case study is Faculty of Economics in Subotica. Listed accessible documents, issued reports, vision and mission statements from the web site of Faculty were considered as a set of key words describing activity or goals of organization. Input categories for text analyses are defined in three sets. Mission vision statements with introductory words of Educational Departments – first set, selected course descriptions – as second set, permitted Bachelor themes – as a third set. Searching for most frequently used terms – words form listed texts revealed some misfits between aims of institution and issued messages. The results are showing lot of missing terms as key words for promoting mission and work scope in future. Applied methodology of the text analysis has given very useful information as a base to compare the key words (the most commonly used terms) and to detect their possible connectedness with different sets of other documentation.*

Keywords: *Text analysis, management and business, key word selection, source document detection.*

1. INTRODUCTION

Organizations seek to maintain different channels of communication. Those emerged channels – medias of information flow after a short period of functioning becomes obsolete and unclear. Different message contains different directions, frequency circulate between the actors, the stakeholders of any organization. Many of those messages are losing track, e.g. vision and mission statements are created - made in every organization, but quite often they do not meet the needs. Furthermore, as part of formalization different documents, standards, roles, job descriptions are created. It is part of management efforts to support coordination, control as well as it becomes part of public relation (PR), promotion and other marketing communication element. From the bottom to the top level of general business strategy, messages are part of organizational culture. [1]

Information is one of the most important resources in the contemporary business environment. It's hard for any company to succeed without issued information about its products or services employees, and other key properties. Every day, companies issue unstructured and structured text to various sources such as web presentation, online services, reviews, emails, and other documents. These sources provide text, which is not easy to analyze without using the right text analysis tool. It's possible to perform text analytics manually, but the manual process is

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ineffective. In the study the so called “Traditional keywords system was applied. As a matter of fact, it is unable to read and understand language in web pages, and text documents. There was no need for that at this stage performed in Study. The text analytics software (Online-Utility.org) [2] for Online Operating System was applied to preliminary detect and count frequency of some common expressions or key words in large volumes of text data. (However, the used free online software supported different languages; the most of explored texts were written in English – [3]).

2. METHODOLOGY

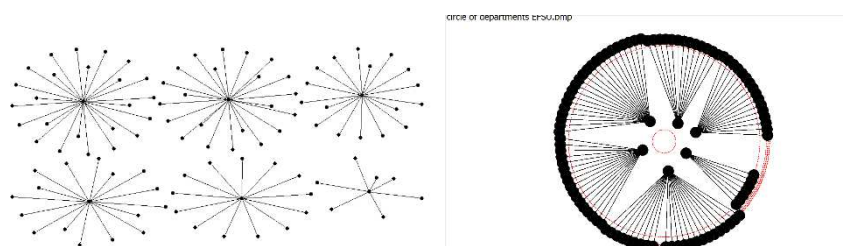
This approach is simplified to basic text analysis. It is not performed with more advanced text mining techniques as a process of exploring and analyzing large amounts of unstructured text data aided by software that can identify concepts, patterns, topics, keywords and other attributes in the data. The applied software belongs to free utility online service. [2] It collected expressions, and most often appearing key words in different documents.

The observed institution, Faculty of Economics in Subotica (In further text Faculty [4]) is organized into Departments and Consulting centers connected with scientific and educational activity. These parts are potential sources of general data, curricula data and can be listed as:

- Department for Agricultural Economics and Agribusiness
- Department of Business Informatics and Quantitative Methods
- Department of European Economics and Business
- Department of Finance, Banking, Accounting and Auditing
- Department of Management
- Department of Trade, Marketing and Logistics and Consulting Centers
- Centre for National and International Projects (CNIP)
- Educational Centre
- Foreign Language Centre
- Sports and Recreation Centre (SRCEF)
- The Information and Documentation center (INDOK)

Figure 1 shows simplified organizational structure with Departments (the sources of data) and teaching staff (somewhat corrected by author according to the considered - analyzed period). This period can be characterized with fairly intense fluctuation in staff. Basically, retirement of full professors and some younger colleges have been promoted to new positions (e.g. for department head, or entered other comities of Faculty, or was appointed to the University management level).

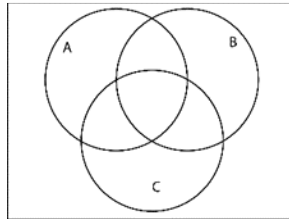
Figure 1: Authors compilation of organizational structure: departments with members – stuff.
Source [5], [6]



The study is based on filtering and comparing some of the key terms connected with three group of documents issued by Faculty of Economics in Subotica (Faculty). In order to narrow the scope, the chosen key terms are about mission and vision statements, curriculums, and themes of Bachelor graduate works. All this material is public and available on web site of the Faculty. Undergraduate academic studies last for four years, i.e. eight semesters, convey 240 ECTS points.

Input categories as different texts will be defined in three sets (set - A, - B, - C.) (see figure 2).

Figure 2: Three sets of documents as three categories to be analyzed



The first set is based on texts from Introductory statements of Faculty and general information on Departments (this set or category could cover additionally contains of any kind of promotional written reports, leaflets, etc.). As a matter of fact, it is representing the wide public information category.

The second set is based on texts from Accreditation documentation of courses and educational programs of Bachelor Studies (available in English selected by criteria of key words management, business, marketing, organization, entrepreneurship in the course title). This list is more professionally oriented. The following courses were taken into consideration: Farm Management, Management of Manufacturing Organic Foods, Marketing Management, Principles of Marketing, Services Marketing, Entrepreneurship, Human Resource Management, Organizational Behavior, Organizational Theory, Principles of Management, Project Management, Business Intelligence Systems, Electronic Business, International Business, Marketing and Management of Trade Companies.

The third set is based on, or includes, the key words extracted from titles of themes - graduation work themes of level – Bachelor degree. (Of course, for wider analysis, the list can be extended with titles of Master and Doctoral (PhD) works; Note: In this study the Master and PhD level is not analyzed). As a matter of fact, the third set is showing key words of what is “realized” the most, e.g. business, management, leadership problems, etc. It can be considered or it is part of the final “product” of Faculty. It is part of intellectual property of students gained through four-year study period.

To prepare the report review and for visualization the Venn diagram – (Gene List Venn Diagram) solver tool was applied. [7] By entering texts either the "text area" or "file upload" the sets can be assigned into the diagram.

3. RESULTS

The first set: Introductory text: Faculty mission and vision statements, Introduction of educational Departments. [4]

Table 1 shows size properties of text about introductory statements.

Table 1: Size properties of text about introductory statements [2]

| | |
|--|---------|
| Number of characters (including spaces): | 8018 |
| Number of characters (without spaces): | 6714 |
| Number of words: | 1047 |
| Lexical Density: | 33.7154 |
| Number of sentences: | 40 |
| Number of syllables: | 2312 |

The texts in category of set A are filtered for phrases in length of 6 words. The following was found (see Table 2).

Table 2: Top phrases between Introductory statements of Faculty and Departments [2]

| Some top phrases containing 6 words (without punctuation marks) | Occurrences (frequency) |
|---|-------------------------|
| students of this profile may find | 6 |
| of this profile may find employment | 6 |
| this profile may find employment in | 4 |
| curriculum provides students with specific fundamental | 2 |
| may find employment in a variety | 2 |
| profile may find employment in a | 2 |
| find employment in a variety of | 2 |
| specialized knowledge in the field of | 2 |
| this curriculum provides students with specific business | 2 |
| this curriculum enables students to | 2 |
| this profile may find employment as | 2 |

The second set: Accreditation documents of courses in English (selected in this study)

The third set: Permitted bachelor themes.

Table 3 is showing text size properties:

Table 3. Size properties of text about permitted bachelor themes [2]

| | |
|--|---------|
| Number of characters (including spaces): | 286496 |
| Number of characters (without spaces): | 201319 |
| Number of words: | 34300 |
| Lexical Density: | 11.1370 |
| Number of sentences: | 5412 |
| Number of syllables: | 77907 |

Table 3: Most popular themes and study programs [2]

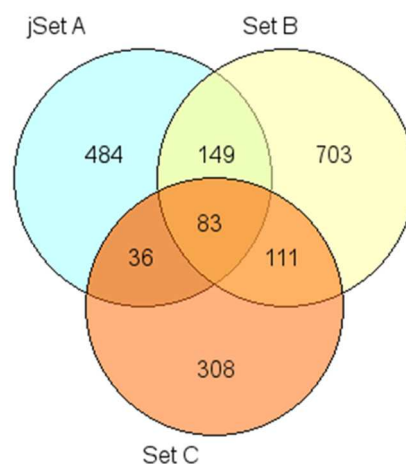
| Some top phrases containing 6 words (without punctuation marks) | Occurrences (frequency) |
|---|-------------------------|
| finance program banking and insurance theme | 235 |
| study program finance banking and insurance | 235 |
| finance banking and insurance topics | 232 |
| banking and insurance theme of graduate thesis | 232 |
| study program marketing topic of graduate thesis | 220 |

| | |
|---|-----|
| economics and business theme of graduate work | 113 |
| study program accounting and review topic | 102 |
| Accounting and Auditing Program | 101 |
| accounting and revision of the topic of graduate work | 101 |
| economics and agribusiness topic of graduate work | 97 |
| study program agrarian economy and agribusiness | 96 |
| program agrarian economy and agribusiness theme | 96 |
| agrarian economy and agribusiness theme of graduate | 96 |
| study program of European economy and business | 81 |
| European Economy and Business Theme Program | 81 |
| European economy and business theme of graduate | 79 |
| study program on the topic of graduate thesis | 76 |
| study program business information systems themes | 76 |
| study program for trade in the topic of graduate thesis | 74 |
| business information system programs | 71 |
| business information systems topics of graduate thesis | 71 |

In order to simplify this rather big text file, words that appear at least two times have been considered in further analyses. According to the aim it was filtered manually with selected management and business specific terminology.

“The visualization is designed to be useful for the researcher to determine the number of publications that fall into each subcategory of research. The usefulness is dependent on how the searcher utilizes it.” [8]. For visualizing the results of key word selection figure 3 is showing the three Venn diagrams with chosen terms. For further analysis the common words between categories are presented (except intersection between set A and B).

Figure 3: Three sets with selected words from three source text categories Source: GeneVenn diagram [7]



Terms in intersections of sets A, B, C [7] - the vocabulary of real key words

According to the common elements (words) the next intersections were analyzed:

Found in gene lists one and three (Set A and set C) = 36

Some of the terms (selected by author) Genes' names:

European, analytical, audits, banks, bookkeeping, co-operation, compliance, component, corporate, direct, economies, employment, exchange, financial, firms, globalization, growth, intelligence, logistics, method, methodology, money, partnerships, prices, public, regional, relationships, rural, sale, selected, statistical, stock, sustainable, tax, time.

This intersection represents terms that are “mentioned” in mission and vision statements of Faculty. It is the list of common word that are directed to future students. For sure there are missing some terms that fulfil modern expectations of future managers, entrepreneurs and leaders - e.g. we suggest mentioning as part of set A (the introductory statements for future students, a vision and mission statements) of: leadership, networking, start up, entrepreneurship.

Found in gene lists two and three (Set B and set C) = 111

Some of the terms (selected by author) Genes' names:

adoption, agribusiness, agriculture, assets, assortment, attitudes, behavior, budget, case, causes, challenges, changes, channels, characteristics, commercial, communications, company, comparative, components, compulsory, conflicts, consequences, consumer, consumers, count, course, creation, credit, culture. decision, demand, digital, diversification, dynamics, economy, electronic, elements, employees, enterprises, entrepreneurship, ethics, example, external, farm, financing, general, genesis, global, goods, group, health, improvement, incentives, internal, internationalization, interpretation, investment, legislation, levels, line, location, means, measures, mix, motivation, motives, organic, organization, payment, personality, plan, platforms, policy, politics, potential, power, practice, practices, problems, project, promotion, protection, purchase, requires, responsibility, results, review, revision, risks, satisfaction, security, selection, service, social, society, strategy, stress, structure, support, tasks, technology, tourism, tracking, transport, using, values, word.

This list is much more diverse and richer list in sense of necessary terms needed to be mentioned in modern communication channels. It is recommended to be adapted for widening the set A (Introductory statements of Mission, Vision and Departments).

Found in all three gene lists = 83

Some of the terms (selected by author) Genes' names:

accounting, activities, agricultural, analysis, approach, banking, basic, between, business, communication, companies, competitive, concept, contemporary, design, designing, development, distribution, economic, education, environment, finance, food, human, implementation, industry, information, innovation, insurance, integration, international, introduction, leadership, making, management, market, marketing, markets, offers, organizations, orientation, performance, planning, principles, problem, process, production, products, projects, promotion, quality, research, resource, role, sales, services, skills, software, solutions, solving, staffing, standards, strategic, strategies, system, team, techniques, theory, trade, training, use, work.

This list is the summary of terms found in lists. However, it is result of selection it represents objectively the “common” area.

4. DISCUSSION

Based on the findings, in first set of data we have determined that key words are oriented to encouragement of future employment of our students. It is worth to consider more in future to emphasize future potential of self-employment, encouraging entrepreneurship so not to be just employee but employer creating and maintaining work. Terms like leadership, start up, accelerate, network, seems to be missing from these introductory messages.

The second set is based on terminology connected with narrower expert knowledge of selected subjects. Because of thematic selection of terms in this study some key words may be lost. But the scope of exploration is basically focused on connection between issuing actor, department and the used “vocabulary” so it can be expected to be found in narrowed list. That is the main reason why the intersection is not presented in details. It can be considered as part of internal communication in organization (Faculty), not showing the effects on student’s choice directly. The interpretation of this set should include more sophisticated selection of key words before visualization. It was not completed for this section.

Third set represents a really huge collection of terms. It somewhat referred the “diffusion” “penetration” of subjects – courses to the student’s way of thinking and areas of interests. It is very interesting to read the common terms on the level of intersection of all three sets and finding the key term as a holder of subject area. Also, the list of the unique terms that are not common for, or in other words, not promoted in vision and mission statements nor in accreditation of courses but used by students, is part of misconnected area of interest? Or just the influence of charismatic performer - mentor?

According to this initialized study, there are many further questions to be explored - e.g. What are the hidden connections that make certain differences between statements and real achievements? What are the sources of weighted influence on results? Solving these questions may need including methodology of Social Network Analysis (SNA) [9], or more narrowed option - the methodology of Organizational Network Analysis (ONA) [9]. The question is connected with different measures such as centrality and prestige, betweenness and brokerage, cauterization, centrality, etc.

5. CONCLUSIONS

In each institution regardless of the ownership form, the founder, the field of education or research the mission, vision, introductory, etc. - statements are created and promoted, launched in all means, obtainable for communication inside and outside of organizations.

Searching for key words and terms with preselected lists may cause data to be distorted, especially if there are many questions of similarity. Some of the key terms used in professional sense became common in everyday conversations. When creating new messages for future economists and entrepreneurs (?) it is becoming crucial question. The influence of this circumstance is day to day more and more perceptible. Considering the results, the most presented key words, as a student’s selection for bachelor themes, there is a certain influence of attractiveness of most popular subjects and mentors. That can cause mass interest and orientation toward relatively limited number of options. According to studied key words of themes there are only few really popular areas for students. If we look for key words associated with those favorite fields between promotional texts we can hardly find enough as encouragement. It is warning sign for future to think over introductory statements with aim to

develop more “fashionable” or more attractive invitational messages. For sure, this question is not just about selecting the most popular terms. It is connected with scientific potential of Faculty staff too.

Regardless of potentials in different software support [10], thorough knowledge and creativity is needed to adequately define criteria for selection of key words as well as to reveal the meaning of professional terminology from different fields. Presented analysis is simplified according to the limited list of entered documents to text analyzer tool. It is considered to be enough to present some applicable methods for quick and effective analyses. Efficiency depends on deliberately selected terms for analyses or their highlighted order.

Missing but have to be stressed

The issued messages do not involve for every department of the Faculty adequate presentation, meantime the emphasized and wished messages are losing meaning. Obviously, the introductory statements of vision and mission do not meet up to date expectations and professional work in Faculty. Modestly represents the real professional work (according to much wider connections between e.g. professional messages – accreditation documentation). The introductory statements and other supporting documents of promotion of Faculty should be rearranged with added new terms of renewed study areas.

The extension of this study is planned to be added in the near future. It is the analysis of connection between mentors and members of graduation committee to map the collaboration between course holders inside and between different departments – understood as different study areas internal interdepartmental coworking. This kind of study may give on information about the members of collective that are in position of networking, in positions called brokers or influencers.

The result obtained from text analysis tools are really applicable, but only for experts – involved stuff of the examined field. The usability of results may be depending on subject, range and differences. But for sure, finding out some key expressions key words offers a fast glimpse into hidden relations and potentials in organizational communication and formalization. If applicable, there are potentials for comparison for narrowed research.

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LEADERSHIP AND MANAGEMENT IN THE E-ENVIRONMENT OF SERBIAN ACADEMIC LIBRARIANSHIP

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Abstract: *The scope of this paper is to show how Serbian academic librarianship may help users who are willing to improve their own knowledge in leadership and management. The retrievals of COBISS (Cooperative On-line Bibliographic System and Services) will be implemented. It will be explained how that indispensable knowledge on leadership and management is organized in Serbian academic librarianship.*

Keywords: leadership, management, academic librarianship, Serbia, e-environment.

1. INTRODUCTION

According to Cambridge Dictionary, leadership is the set of characteristics that make a good leader. It is also the position or fact of being the leader (1). Management of an enterprise implies the following phases: planning, organization, and control. However, these phases are also indispensable for cultural and educational institutions.

There is no successful organization without the efficient management. Nowadays, libraries possess e-resources that students, researchers, professors and other staff may use for finding necessary materials. Printed materials are still being used and they will be used also in future. They are practical for citing. Library users may read printed materials relaxed in an armchair or in a park.

Human resources require particular attention. The number of those people who found a job or a better one upon their specialization is not so small. Studying professional resources helps readers to get knowledge which can be their comparative advantage on the international labour market.

This paper is focused on the academic libraries of Serbia in the system COBISS (Cooperative On-line Bibliographic System & Services). The states of ex-Yugoslavia where COBISS is implemented are Slovenia, Serbia, Bosnia and Herzegovina, Montenegro, and Macedonia. COBISS is implemented also at Kosovo and Metohia. This is illustrated by the map no. 1.

¹⁶⁴ „Svetozar Marković“ University Library, Bulevar kralja Aleksandra 71, 11000 Belgrade, Republic of Serbia

Map 1. COBISS in YUGOSLAVIA (grey surface)



2. LEADERSHIP AND MANAGEMENT IN SERBIAN ACADEMIC LIBRARY ENVIRONMENT

Academic libraries in Serbia also tend to implement marketing. As a professional discipline marketing is not new in libraries. Academic librarianship includes the adjustment to the needs of users as a necessity or even the imperative. The academic libraries of Serbia tend to adjust regularly the conditions of work to the students who are their most numerous users including postgraduates. Except that, libraries get adjusted to the needs and wishes of the researchers, teachers, the employed and the unemployed if they have a right to become library members. For postgraduates, it is usually sufficient to be enrolled at the studies in order to fulfill the conditions for receiving a membership card. The unemployed may have also their own professional reasons to consult academic materials.

The „Svetozar Marković“ University Library in Belgrade is open for users since 1926 (2). This is the central library of the University of Belgrade. This library is included into COBISS (Cooperative On-line Bibliographic System & Services) (3) and it acquires literature on leadership and management as well as all other necessary materials in several ways. Some of them should be mentioned, such as:

- compulsory copy,
- purchase,
- gift, and
- the exchange.

Except cataloguing and classification of monographs, the employed in this library *analytically* catalogue and classify monographs and serials. They implement international standards for bibliographic description of library materials. These standards for monographs are known as ISBD (M) e.g. International Standards for Bibliographic Description of Monographs. Furthermore, these standards are adopted by the International Federation of Library Associations and Institutions (IFLA) (4).

It is through the insight into the e-catalogues of leading world libraries that users may get the information on new editions in their professional field. They can find a useful reference and borrow a book through the interlibrary loan service with abroad. In the central library of the University of Belgrade, this service is possible only for those persons who became its` members. Except this, the academic libraries of Serbia give users the opportunity to retrieve the aggregated data bases with e-articles in full text.

Library personnel help users regularly in order to improve the retrievals of the information e-resources. It is not unusual that a library user tries to carry out his first retrieval of an e-resource at a computer within the academic library. Libraries are still in the very core of the Information Society as they had been ten years ago.

The vast majority of e-articles in full text are published in English as far as professional e-resources are concerned. Except that, the development of the Knowledge Society imposes the promotion of a linguistic culture. IFLA keeps developing free access to information and freedom of expression. The process of globalizing imposes the necessity of learning or improving the knowledge of foreign languages in order to follow scientific and technical progress easier.

Table 1. Bibliographic descriptions on *education and management* in the e-catalogue of the "Svetozar Marković" University Library in Belgrade

| Terms | No. of bibliographic descriptions |
|-------------------------------------|-----------------------------------|
| Marketing and management | 80 |
| Economics and management | 109 |
| Economic development and management | 15 |
| Economics and leadership | 10 |
| Education and leadership | 15 |
| Education and management | 130 |
| Culture and management | 24 |
| Culture and leadership | 16 |

Resource: www.unilib.rs (Access: 28.11.2018.) (5)

Table 2. Bibliographic descriptions on *education and management* in the cumulative e-catalogue of Serbian academic librarianship

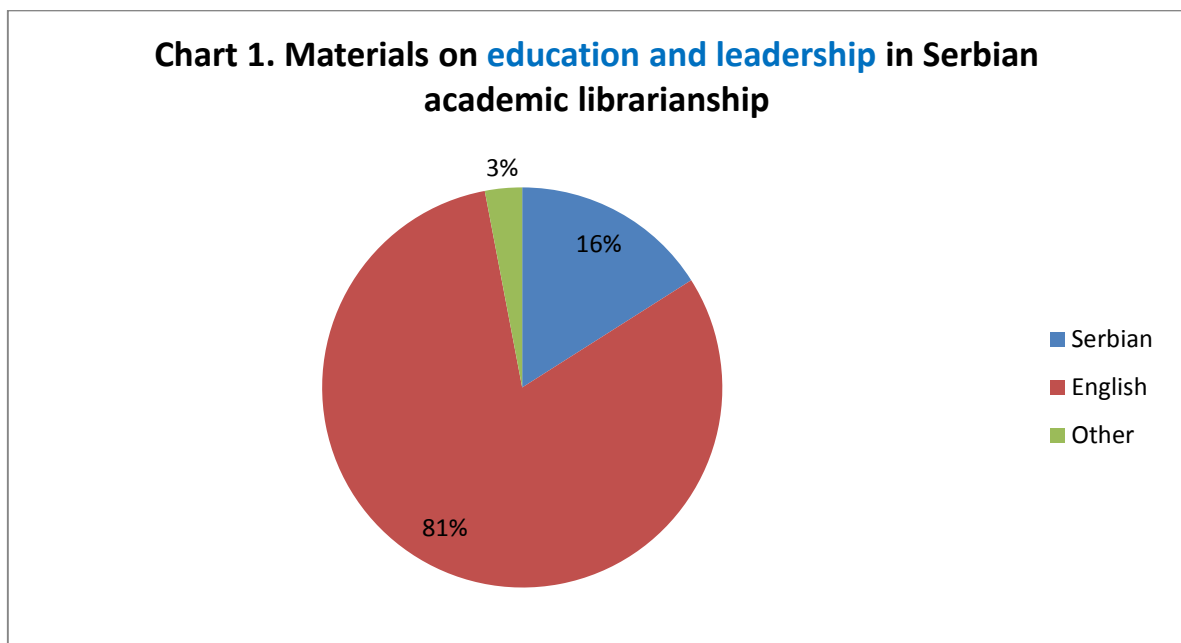
| Terms | No. of bibliographic descriptions |
|-------------------------------------|-----------------------------------|
| Marketing and management | 839 |
| Economics and management | 934 |
| Economic development and management | 188 |
| Economics and leadership | 94 |
| Education and leadership | 213 |
| Education and management | 1072 |
| Culture and management | 333 |
| Culture and leadership | 224 |

Resource:

<http://www.vbs.rs/scripts/cobiss?ukaz=BASE&bno=99999&id=1845507344226384>
(Access: 28.11.2018.) (6)

English language is a leading business language in the world. It is known as *lingua franca* nowadays. There are many materials on management in the academic librarianship of Serbia. It would be realistic to expect that young people go on to read materials after their studies would be over in order to improve their own knowledge and promote their own linguistic skills in foreign languages. The investments into personal knowledge needn't stay without any particular achievement.

This is true particularly if a library user makes well a choice of a domain for his further professional development. One of the scopes of The Bologna Declaration of 19 June 1999 – Joint Declaration of the European Ministers of Education, was to promote the employability of the European citizens who obtained a degree after their higher education. Therefore, degrees are to be *easily readable* and *comparable*. (7)



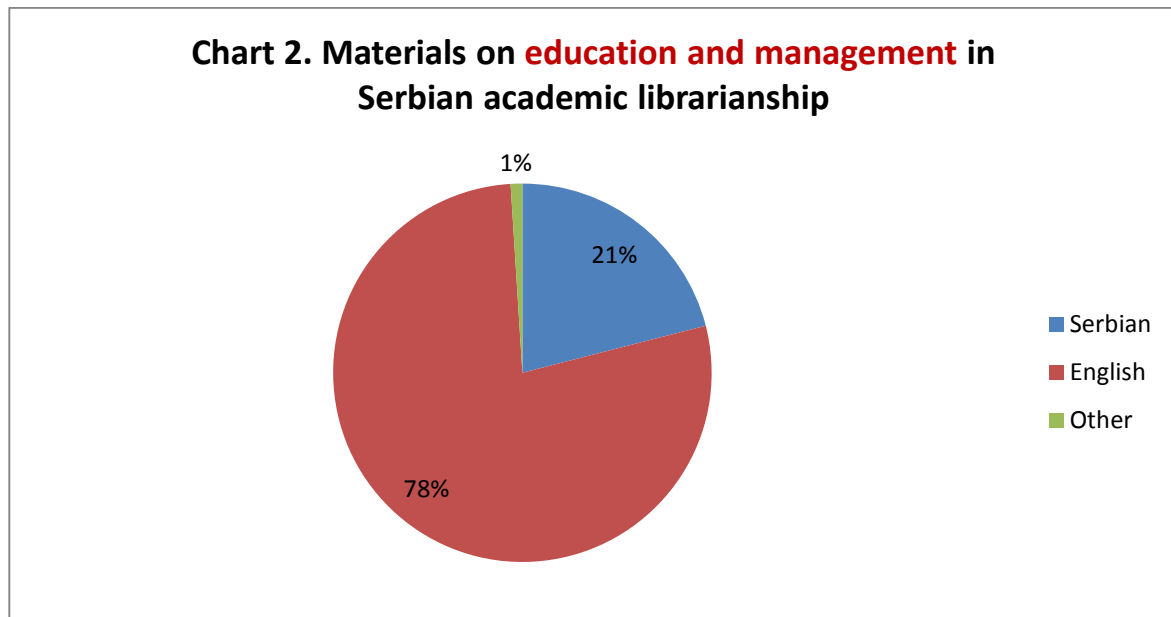
Resource for data: cumulative e-catalogue COBIB.SR (Accessed: 1 December 2018)

Leaders usually concentrate on purpose, guidelines, vision, scopes, and efficiency. While managers keep administrating, leaders keep innovating. Managers are focused on a system and a structure within an organization they are employed in. However leaders are focused mostly on human resources. Managers usually rely on control. Leaders rely usually on confidence. Leaders watch towards a horizon. Managers are interested in the operation line. (8)

Predicting the characteristics of the innovative organization, some authors mentioned:

- positive atmosphere and the employed who make jokes,
- high level of energy and enthusiasm,
- the employed who are able to control their job,
- the employed who work in a team,
- a high difference in salaries from one calendar year to another,
- permanent education or specialization,
- managers who are accessible to the personnel etc. (9)

This is quite comprehensive for all organizations e.g. profit and non-for profit organizations. Academic libraries are to be innovative ones particularly because of the fact that they belong to the group of scientific organizations.



Resource for data: cumulative e-catalogue COBIB.SR (Accessed: 28 November 2018)

During the last five years The University of Belgrade established its` digital repository PHAIDRA (Permanent Hosting, Archiving and Indexing of Digital Resources and Assets) (10). Full texts of doctoral dissertations are being downloaded in it. The University of Kragujevac has also its` own digital repository PHAIDRA for similar purposes (11). Except that, The University of Niš has its` own digital repository PHAIDRA, where the full texts of doctoral dissertations defended at that university are being downloaded in .pdf format (12).

3. THE INTERLIBRARY LOAN SERVICE WITH ABROAD

The interlibrary loan service with abroad is a possible way to overcome the lack of literature in a library at least partly. Except that, there are users who became the members of several libraries in order to widen their professional and scientific horizons. Professional materials in free access become more and more numerous. However it is far away from users` needs in many domains.

Postal costs for the interlibrary loan service with abroad are to be covered. Therefore, users have to pay such fees which are not very high. The „Svetozar Marković“ University Library has such a service in its` offer for users. It is one of its` comparative advantages in the world of Serbian libraries.

4. A PRECIOUS PORTAL - DART

It is through the retrieval of DART-Europe E-theses Portal that the data in tables 3 and 4 were received (13). The number of e-theses on *education and leadership* is the highest in the United Kingdom, Sweden and Netherlands. When the inquiry was changed into *education and management*, the same order was received when the first three places were had in mind.

This paper does not comment the quality of the e-theses. This quantitative approach which is used will just illustrate the subject concerning the materials freely available. Such materials in full text can be usually downloaded in .pdf format.

Table 3. The no. of e-theses on education and leadership on DART-Europe E-theses Portal

| State | No. of e-theses |
|----------------|-----------------|
| UK | 1206 |
| Sweden | 451 |
| Netherlands | 315 |
| Spain | 185 |
| France | 135 |
| Ireland | 128 |
| Greece | 119 |
| Italy | 104 |
| Finland | 102 |
| Norway | 92 |
| Switzerland | 48 |
| Hungary | 47 |
| Serbia | 25 |
| Portugal | 23 |
| Belgium | 18 |
| Estonia | 12 |
| Lithuania | 6 |
| Bulgaria | 5 |
| Czech Republic | 5 |
| Germany | 4 |
| Austria | 3 |
| Denmark | 3 |
| Latvia | 3 |
| Poland | 3 |
| Croatia | 1 |
| Cyprus | 1 |

Resource: www.dart-europe.eu (Accessed: 29.11.2018.)

It is obvious that Serbia participates very actively in the process of knowledge globalization. The number of e-theses received upon both retrievals surpasses 20. Doctoral dissertations in Serbia have the expanded abstract in English as well as the list of resources used for writing a doctoral dissertation. Except that, materials in .pdf may inform every reader about the type of illustrations used for the conducted research.

Table 4. The no. of e-theses on education and management on the European Portal of E-theses DART

| State | No. of e-theses |
|-------------|-----------------|
| UK | 1362 |
| Sweden | 459 |
| Netherlands | 309 |
| Spain | 243 |
| France | 182 |
| Greece | 163 |
| Ireland | 150 |
| Finland | 135 |
| Italy | 106 |
| Latvia | 70 |

| | |
|----------------|----|
| Norway | 68 |
| Switzerland | 39 |
| Hungary | 38 |
| Serbia | 35 |
| Belgium | 27 |
| Portugal | 24 |
| Estonia | 17 |
| Croatia | 16 |
| Lithuania | 12 |
| Czech Republic | 9 |
| Denmark | 9 |
| Germany | 9 |
| Bulgaria | 8 |
| Slovenia | 5 |
| Cyprus | 4 |
| Austria | 2 |
| Poland | 1 |

Resource: www.dart-europe.eu (Accessed: 29.11.2018.)

The users of the academic libraries in Serbia may receive e-articles in full text. This opportunity exists for all those libraries which are the members of KOBSON (Consortium for Coordinated Acquisition of Serbian Libraries). Serbian Academic Library Association (SALA) contributes to the promotion of library work through its` regular activities which are being performed in professional bodies (14).

5. CONCLUSION

Lots of materials which concentrate on *leadership and education* are available to the users in Serbian academic librarianship. There are many library units which analyze seriously and very professionally *management* in the context of *education* from different academic points of view. English language is the leading one as far as these editions are concerned. Except that, there are many theses freely available in full text which refers to the problems of education, management and leadership as well. The users of Serbian academic libraries may retrieve freely aggregated data bases with e-articles in full text. Library personnel have always been ready to make the retrievals easier.

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ETIKA U NASTAVNIM PROGRAMIMA STRUČNIH STUDIJA PODUZETNIŠTVA I MENADŽMENTA

ETHICS IN THE LEARNING PROGRAMS OF PROFESSIONAL STUDIES OF ENTREPRENEURSHIP AND MANAGEMENT

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Sažetak: *Uključivanje etike u nastavne programe stručnih studija poduzetništva i menadžmenta ukazuje na činjenicu da je etika postala ne samo neizostavni dio suvremenog curriculum, već i jamstvom intelektualne raznolikosti te kroz rasprave i debate vraćanja stvarnog poslovnog svijeta u predavaonice. Etika se ne bavi stvarima kakve one jesu, već kakve trebaju biti te je temeljna zadaća etičara stalno preispitivati postojeću praksu. U skladu s tim u ovome se članku nakon određenja poslovne etike i isticanja čimbenika koji opredjeljuju važnost poslovne etike u svijetu i kod nas, istražuje uloga i važnost poslovne etike u nastavnim programima stručnih studija poduzetništva i menadžmenta u Republici Hrvatskoj. U obradi navedenih objekata istraživanja osim deskriptivne znanstvene metode, primjenjuju se metode analize i sinteze, indukcije i dedukcije te teorija sustava.*

Ključne riječi: *etika, nastavni programi, stručni studiji, poduzetništvo, menadžment*

Abstract: *Inclusion of ethics in curriculum of entrepreneurial studies and management shows that ethics has become not only an indispensable part of contemporary curriculum, but also the guarantee of intellectual diversity, as well as through discussions and debates the return of the real business world to the lecture halls. Ethics does not deal with things as they are, but what they should be, and the fundamental task of an ethics is to constantly re-examine the existing practice. Accordingly, in this article, following the determination of business ethics and highlighting the factors that determine the importance of business ethics in the world, the role and importance of business ethics in the learning programs of professional studies of entrepreneurship and management in the Republic of Croatia are explored. Methods of analysis and synthesis, induction and deduction, descriptive method and system theory are applied to the research objects.*

Keywords: *ethics, curriculum, professional studies, entrepreneurship, management*

1. UVOD

Nemogućnost ekonomije da znanstveno utemeljeno riješi pitanja poput onih koliko visoka treba biti inflacija, treba li društvo pomagati siromašne ljude ili koliko država treba trošiti za obranu, dovelo je do mišljenja da je poslovna etika disciplina isključivo u domeni filozofa i teologa. Isključivanje ekonomista, odnosno menadžera i lidera iz diskusije o problematici poslovne etike rezultiralo je činjenicom da su neki gospodarstvenici ustvrdili da bi okretanje poslovnih ljudi kršćanskoj etici proizvelo najveće ekonomske poremećaje u povijesti. Ne bavimo se mi poslovanjem da bismo promovirali etiku, kažu oni, već potragom

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za profitom gdje god to zakon izričito ne zabranjuje. Pitanje poslovne etike ili etike u gospodarstvu postaje vrlo aktualno sedamdesetih godina prošloga stoljeća u razvijenim industrijskim državama. Rasprave o etičkom legitimitetu poduzetničkih aktivnosti u konkurentski profiliranom gospodarskom okružju prihvaćane su u početku s rezervom. Nakon osnutka brojnih istraživačkih centara, udruženja i časopisa, kao i uvođenja posebnih kolegija na poslovnim školama i fakultetima, zanimanje za poslovnu etiku u posljednjem desetljeću prošloga stoljeća biva sve manje. Tako, primjerice, studenti *Harvarda* od 1988. godine moraju proći posebni trodnevni seminar koji se bavi isključivo etičkim dvojama u poslovanju. Više od toga, međutim, nije obvezno. Poput *Harvarda* i druga američka sveučilišta razmatraju nov način pristupa profesionalnoj etici. Obnavlja se nastavu iz kolegija Poslovna etika uz obrazloženje da je stjecanje znanja iz poslovne etike jednako važno kao i usvajanje matematičkih i drugih stručnih znanja. Poslovna etika može pružiti dokaze da je neka gospodarska praksa nemoralna, ali je očito da ponajprije od onih koje je proučavaju ovisi hoće li ono što uče pretvoriti u praksu. Ponovno vraćanje poslovnoj etici posljedica je računovodstvenih skandala u američkim korporacijama.

Poslovna etika danas se u Republici Hrvatskoj izučava na brojnim veleučilišnim i sveučilišnim studijima ekonomije poduzetništva i menadžmenta. U skladu s tim u ovome radu predstaviti će se nastavni programi Poslovne etike na stručnim studijima ekonomije poduzetništva na Veleučilištu u Rijeci, VERN-u Zagreb, Visokoj školi za ekonomiju „Nikola Šubić Zrinski“ u Zagrebu i Veleučilištu „Nikola Tesla“ u Gospiću te nastavni programi poslovne etike na stručnom studiju Zagrebačke škole ekonomije i menadžmenta, Veleučilištu u Šibeniku i Međimurskom veleučilištu u Čakovcu. Na kraju rada bit će prezentiran primjer izrade prijedloga programa Poslovne etike za novi stručni studij održivog agrarnog turizma na Veleučilištu u Rijeci koji se od akademske 2018./19. počeo izvoditi u Rijeci.

2. ETIČKI PRISTUP POSLOVANJU

Poslovna etika dio je modernog poslovanja poduzeća. Nastala suradnjom etike i ekonomije grana je etike u istom rangu kao što su to etika životne sredine, medicinska etika, etika znanstveno-istraživačkog rada ili bilo koja druga grana etike koja nastaje u procesu uspostavljanja etike kao filozofske discipline. Postojeći zahtjev za poslovnom etikom sučeljava se s često postavljanim pitanjem: *Mogu li se etička načela realizirati pod ekonomskim pritiskom konkurencije u tržišnom gospodarstvu?* Odgovor na to pitanje može i treba biti potvrđan. Poslovna etika istražuje vrijednosne sudove koji određuju odlučivanje u gospodarstvu, njihove veze i odnose s društvenim okružjem i daje prijedloge za etički racionalno djelovanje. Sukladno tome, poslovna etika može se definirati kao skup moralnih načela i normi kojima se usmjerava ponašanje aktivnih sudionika u gospodarskom sustavu, u skladu s vrijednosnim sudovima koji se temelje na općim ljudskim vrijednostima i usmjerene su na dobrobit čovjeka. Njezino osnovno pitanje jest pitanje kriterija ispravnoga izbora u realizaciji poduzetničkih ciljeva između mnoštva ekonomskih mogućnosti. Zadaća poslovne etike mogla bi se pojednostavljeno svesti na kritičko preispitivanje postojećega morala, normi i ciljeva u gospodarstvu i pronalaženje normi dobrog gospodarjenja. Poslovna etika polazi od pretpostavke da u gospodarstvu ne smije biti prioritetno djelovanje isključivo po načelu ekonomske racionalnosti (Profit da, ali ne po svaku cijenu), nego treba voditi računa i o posljedicama gospodarskih aktivnosti i poslovnih odluka za društvo, okružje i ključne sudionike. Sukladno Kantovu kategoričkom imperativu, maksima poslovne etike glasi: *Radi tako da učinci tvojega rada budu prihvatljivi za trajan i kvalitetan ljudski život na Zemlji.* To znači da se etička pitanja ne smiju postavljati samo u kontekstu raspodjele profita (dobiti), potrebno je da se odnose na cjelokupnu poduzetničku aktivnosti.

Zašto poslovna etika dobiva na važnosti u svijetu, ali i kod nas? Odgovor na to pitanje nije jednoznačan te se čini primjerenim potražiti ga u sljedećim činjenicama. Prvo, evidentno je povećanje samosvijesti javnosti i značenja javnoga mnijenja za poslovne aktivnosti, drugo, razvija se svijest o ograničenosti prirodnih resursa i ugroženosti prirodnoga okruženja, treće, razvoj poslovnih organizacija, napose multinacionalnih kompanija, rezultirao je povećanjem njihove moći u društvu nagovještavajući vladavinu ekonomije nad politikom, četvrto, ne smiju se smetnuti s uma ni brojni skandali u gospodarstvu vezani uz korupciju i peto, razvoj znanosti i tehnologije. U vezi s poslovnom etikom često se spominje anegdota vezana za satiričara *Karla Krausa*, koji na retoričko pitanje: “*Želite studirati poslovnu etiku?*” odgovara: “Tada se odlučite za jedno ili drugo”. Takvo promišljanje fenomena poslovne etike ne zadovoljava suvremene teoretičare, nego ih upućuje da iznesu brojne argumente za pristup “i-i”, odnosno da potvrde svoje uvjerenje kako samo etički pristup poslovanju može zajamčiti dugoročni uspjeh u gospodarskoj areni.

3. POSLOVNA ETIKA U PROGRAMIMA STRUČNIH STUDIJA

3.1. POSLOVNA ETIKA U PROGRAMIMA STRUČNIH STUDIJA EKONOMIJE PODUZETNIŠTVA

3.1.1. POSLOVNA ETIKA U PROGRAMU STRUČNOG STUDIJA PODUZETNIŠTVO NA VELEUČILIŠTU U RIJECI

Naziv kolegija: Poslovna etika. Kolegij nosi 5 ECTS boda i izučava se u II. semestru. Čimbenici koji određuju dodijeljenu visinu ECTS bodova jesu: završni ispit 1 ECTS bod i kontinuirana provjera znanja (aktivnosti na nastavi i kolokviji) 4 ECTS boda. Nastava se izvodi tjedno u obliku predavanja i vježbi (2+2). Ishodi učenja: Definirati pojam, predmet, načela i vrijednosti poslovne etike, Argumentirati stavove zagovornika i protivnika uvođenja etike u gospodarstvo, Usporediti praktične etike važnijih svjetskih religija, Definirati bitne odrednice dobrog društva, Opisati suvremeni pristup određivanju dobrog poduzeća, Razlikovati poslovno etičan i poslovno neetičan menadžment, Usporediti prava i obveze zaposlenika, Napraviti prijedlog zaštite “zviždača”.

3.1.2. POSLOVNA ETIKA U PROGRAMU STRUČNOG STUDIJA EKONOMIJA PODUZETNIŠTVA NA VERN'U ZAGREB

Naziv kolegija: Poslovna etika i kultura šesti semestar. Kolegij nosi 4 ECTS boda. Nastava se izvodi tjedno u obliku predavanja i vježbi (2+2). Ishodi učenja: prepoznati temeljne teorije poslovne etike, opisati njihove značajke, te argumentirati stajališta o potrebi proučavanja i primjene poslovne etike u različitim situacijama; prepoznati različite utjecaje koji oblikuju naše vrijednosne sustave; identificirati dionike i objasniti etičku dilemu u poslovanju na individualnoj, organizacijskoj i društvenoj razini; analizirati slučajeve iz prakse odabranim načinom donošenja etičkih odluka, povezati odgovore na tri etička pitanja, te argumentirati prijedloge rješenja; diskutirati etičke teme poslovnog okruženja, zaposlenika, okoliša i kupaca, te osmisliti i napisati etički kodeks; prepoznati etičke teme u raznim poslovnim situacijama, te osmisliti i preporučiti najprimjerenije scenarije društveno odgovornog poslovanja; odabrati odgovarajuću temu iz poslovne etike, obraditi je uz integriranje korištenih alata za analizu, opisati etički slučaj te predstaviti grupi zaključke svojega projekta.

3.1.3. POSLOVNA ETIKA U PROGRAMU STRUČNOG STUDIJA VISOKE ŠKOLE ZA EKONOMIJU, PODUZETNIŠTVO I UPRAVLJANJE „NIKOLA ŠUBIĆ ZRINSKI“ U ZAGREBU

Naziv kolegija: Gospodarska etika šesti semestar. Kolegij nosi 4 ECTS boda. Nastava se izvodi tjedno u obliku predavanja i vježbi (1+1). Ishodi učenja: Valorizirati važnost normativne etike za poslovno/gospodarski svijet; Opisati dosljedno i etično ponašanje u vođenju i realizaciji različitih poslova; Procijeniti etičke odluke u konkretnom slučaju; Predvidjeti moguće etičke slučajeve u poslovanju tvrtke; Preispitati etičke dileme koje se pojave unutar samog poduzeća, ili u odnosu poduzeća prema vani; Prepoznati poslovno etičke strategije, te primjena ispravne strategije u svom resoru, Integrirati temeljna etička načela u poslovanje; Opisati potrebe etičke odgovornosti menadžera, Koristiti etička pravila (bonton) u ophođenju i komuniciranju Prepoznati i vrednovati uloge poslovne etike u vlastitom okružju, uvažavajući običaje i potrebe vlastite okoline.

3.1.4. POSLOVNA ETIKA U PROGRAMU STRUČNOG STUDIJA EKONOMIJA PODUZETNIŠTVA NA VELEUČILIŠTU „NIKOLA TESLA“ U GOSPIĆU

Naziv kolegija: Etika i društvena odgovornost. Kolegij nosi 4 ECTS boda i izučava se u drugom semestru. Čimbenici koji određuju dodijeljenu visinu ECTS bodova jesu: kontinuirana provjera znanja (aktivnosti na nastavi i kolokviji) 4 ECTS boda. Nastava se izvodi tjedno u obliku predavanja i vježbi (2+1). Cilj kolegija jest uvesti studente u pojam etičkog ponašanja, te savladati vještine društveno odgovornog poslovanja temeljenog na etički moralnim načelima. Sadržaj kolegija: Pojam i definiranje poslovne etike i društvene odgovornosti poduzeća; teorije poslovne etike i društvene odgovornosti poduzeća. Uloga poslovne etike; koncept slobode naspram odgovornosti. Društveno odgovorno poslovanje interesno - utjecajnim skupinama. Društvena odgovornost poduzeća kao izvor lojalnosti kupaca; kao dio korporativnog upravljanja; povezivanje korporativnog sustava i strukture. Društvena odgovornost kao ključna determinanta konkurentske prednosti suvremenih poduzeća.

3.2. POSLOVNA ETIKA U PROGRAMIMA STRUČNIH STUDIJA MENADŽMENTA

3.2.1. POSLOVNA ETIKA U PROGRAMU PREDDIPLOMSKOG STRUČNOG STUDIJA MENADŽMENTA ZAGREBAČKE ŠKOLE EKONOMIJA I MENADŽMENTA - ZŠEM

Naziv kolegija: Poslovna etika i korporacijska društvena odgovornost, osmi semestar. Zagrebačka škola ekonomije i menadžmenta nema samo cilj obrazovati buduće poslovne ljude i ekonomske stručnjake, već im pritom prenijeti etičke vrijednosti koji će ih učiniti odgovornom poslovnim stručnjacima. Ovaj kolegij će razviti njihove senzibilnosti na nemoralne radnje u poslovnom svijetu i poticati ih na proaktivno djelovanje koje je etično i društveno odgovorno. U poslovnim slučajevima će se studenti susretati s etičkim problemima, te će naučiti kako sustav vrijednosti organizacije utječe na dugoročnu dobit i gubitke te tvrtke. Nakon završetka ovog kolegija, studenti će imati potrebna znanja za donošenje odluka u poslovanju kojim se rješavaju etičke dvojbe, uzimajući pri tome u obzir cijeli spektar čimbenika koji utječu na sferu u kojoj se poslovanje odvija.

3.2.2. POSLOVNA ETIKA U PROGRAMU SPECIJALISTIČKOG DIPLOMSKOG STUDIJA MENADŽMENTA VELEUČILIŠTA U ŠIBENIKU

Naziv kolegija: Poslovna etika. Kolegij nosi 6 ECTS bodova i izučava se u drugom semestru specijalističkog diplomskog studija. Nastava se izvodi tjedno u obliku predavanja i seminarskih vježbi (3+1). Kompetencije stečene studiranjem sadržaja ovog kolegija su: upoznatost sa teorijom i praksom suvremene poslovne etike u zemlji i svijetu, te shvaćanje i primjenu primjerenih poslovnih etičkih načela poslovanja, kao i primjena istih u različitim poslovnim situacijama. Ishodi učenja: Identificirati specifična znanja iz područja poslovne etike; Identificirati temeljne teorijske pristupe; Prepoznati poveznice poslovne etike; Interpretirati problematične situacije; Analizirati i sintetizirati različite pristupe; Izgraditi sustavno znanje za daljnje proučavanje i analizu; Kritički prosuđivati primjenu poslovne etike u različitim organizacijama; Kritički prosuđivati šire socijalne i etičke probleme u području poslovne etike.

3.2.3. POSLOVNA ETIKA U PROGRAMU STRUČNOG STUDIJA MENADŽMENTA, TURIZMA I SPORTA NA MEĐIMURSKOM VELEUČILIŠTE U ČAKOVCU

Naziv kolegija: Poslovna etika. Kolegij nosi 4 ECTS boda i izučava se u petom semestru kao izborni kolegij. Čimbenici koji određuju dodijeljenu visinu ECTS bodova jesu: kontinuirana provjera znanja (aktivnosti na nastavi i kolokviji) 4 ECTS boda. Nastava se izvodi tjedno u obliku predavanja i vježbi (2+1). Cilj je kolegija je upoznati studenta sa temeljnim pojmovima, pojavama, problemima etičkog poslovanja i korporativne društvene odgovornosti, za razvoj senzibilnosti za poslovno ponašanje i radnje koje se smatraju neetičnima, poticati korporativnu društvenu odgovornost studenata, stjecanje znanja i vještina potrebnih za prepoznavanje tipičnog neetičnog i neodgovornog poslovnog ponašanja te korigiranje buduće prakse. Ishodi učenja: Sposobnost uočavanja društveno prihvatljive razlike između moralnog i nemoralnog poslovnog ponašanja; Sposobnost uočavanja prihvatljivog postupanja sa nacionalnim manjinama u vidu njihove asimilacije u društvo; Poznavanje modela društveno odgovornog poslovnog ponašanja; Poznavanje etičkog kodeksa te izrade etičkog kodeksa; Razvoj svijesti i osjetljivosti međuljudskog postupanja unutar radnog okruženja; Uklapanje u timski rad te poznavanje glavnih vrijednosti zajedničkog donošenja odluke i izrada projekta; Kvalitetna izrada stručnog rada sa pravilnim korištenjem adekvatnog izvora; Jačanje prezentacijskih sposobnosti; Uočavanje etičkih oblika ponašanja i primjene istih i Izbjegavanje neetičkih oblika ponašanja.

4. POSLOVNA ETIKA U BUDUĆIM PROGRAMIMA STRUČNIH STUDIJA – PRIMJER IZRADA PROGRAMA POSLOVNE ETIKE ZA STRUČNI STUDIJ ODRŽIVOG AGROTURIZMA

Sklapanjem ugovora između Ministarstva znanosti obrazovanja i sporta, Agencije za strukovno obrazovanje i Veleučilišta u Rijeci, 19. lipnja službeno je krenuo projekt pod nazivom "Razvoj stručnog studija održivog agroturizma kroz Hrvatski kvalifikacijski okvir". Projekt je prijavljen na Europski socijalni fond, a provodio se od 19. lipnja 2015. do 19. rujna 2016. Vrijednost mu je 1,8 milijuna kuna, a s partnerima Gradom Pazinom i LAG-om Središnja Istra, nositelj mu je Veleučilište u Rijeci, čiji Odjel djeluje u Pazinu.

Poljoprivreda i turizam predstavljaju strateške grane gospodarstva, navodi se u sadržaju projekta, a turizam je djelatnost putem koje se ostvaruju multiplikativni ekonomski učinci, dok poljoprivredu karakterizira sporija dinamika razvoja. Povezivanjem i međusobnim djelovanjem ovih grana, omogućuje se bolja valorizacija turizma i poljoprivrede, kao

konkurentnih grana gospodarstva u ujednačenom i održivom razvoju regije. Razvoj ovog studijskog programa obuhvaća i predviđa udruživanje dionika u sljedećim aktivnostima: analizi potencijalnih polaznika studijskog programa, razvoju standarda kvalifikacija i studijskog programa održivog agroturizma s istaknutim kompetencijama, znanjima i vještinama, definiranim u ishodima učenja u suradnji s poslodavcima, zatim razvoj standarda zanimanja, izrada plana fleksibilnog educiranja nastavnog osoblja kao neposrednog, aktivnog sudionika u razvoju ljudskih resursa s kompetencijskim pristupom, koji u središte stavlja studenta.

Nakon što su s poslodavcima kao dionicima uređene kompetencije, odnosno za što studenti trebaju biti osposobljeni ili što studenti trebaju znati, pristupilo se izradi ishoda učenja prema skupinama kompetencija (cf. tablicu 1).

Tablica 1. Prijedlog skupa ishoda učenja iz Društveno odgovornog poslovanja za stručni studij održivog agroturizma

| | |
|---|---|
| Naziv prijedloga skupa ishoda učenja | Primjenjuje principe društveno odgovornog ponašanja u svim aspektima poslovanja |
| Popis ishoda učenja | <ul style="list-style-type: none"> • Kritički prosuditi i procijeniti ekonomska, pravna, etička i filantropska očekivanja društva od poduzeća u određenom vremenskom razdoblju. • Usporediti i kritički prosuditi razinu društvene odgovornosti poduzeća u međunarodnom kontekstu |
| Postupak i primjeri vrednovanja svih ishoda učenja unutar predloženog skupa ishoda učenja | <p>Primjer zadatka: Navesti, rangirati i argumentirati četiri razine društvene odgovornosti poduzeća te usporediti valjanost predloženog modela i njegove učinke u Europskom, Azijskom i Afričkom kontekstu. Argumentirano obrazložiti trebali se globalni program društveno odgovornog poslovanja temeljiti na nacionalnoj ili regionalnoj osnovi.</p> |
| Naziv prijedloga skupa ishoda učenja | Provjerava sve organizacijske procese i njihovu usklađenost s temeljnim principima |
| Popis ishoda učenja | <ul style="list-style-type: none"> • Valorizirati korištenje svih resursa s motrišta društveno odgovornog poslovanja u funkciji kreiranja mjerljivih i poželjnih vrijednosti za dionike. • Procijeniti kapacitete društveno odgovornog ponašanja poduzeća • Izmjeriti i ocijeniti izlazne veličine (rezultate) društveno odgovornog ponašanja poduzeća. |
| Postupak i primjeri vrednovanja svih ishoda učenja unutar predloženog skupa ishoda učenja | <p>Primjer zadatka: Kako poduzeće može valorizirati usklađenost svih organizacijskih procesa s principima društveno odgovornog poslovanja s motrišta ekološke politike, socijalnih programa i društveno utjecaja? Odgovore potkrijepiti primjerima dobre prakse. Navedi i pojasni četiri razine društvene odgovornosti poduzeća? Obrazloži kako poduzeće može izmjeriti i ocijeniti izlazne veličine (rezultate) društveno odgovornog ponašanja u područjima društvene politike, društvenih programa i društvenog utjecaja?</p> |
| Naziv prijedloga skupa ishoda učenja | Poznaje i primjenjuje načela poslovne etike |
| Popis ishoda učenja | <ul style="list-style-type: none"> • Kritički prosuđivati temeljne vrijednosti građanskog društva i projicirati ih u okviru poduzeća • Poduprijeti i vrednovati važnost primjene suvremenih načela poslovne etike u malim, srednjim i velikim poduzećima |
| Postupak i primjeri vrednovanja svih ishoda učenja unutar predloženog skupa ishoda učenja | <p>Primjer zadatka: Kako se osnovne vrijednosti građanskog društva izražavaju u organizacijama? Argumentirano obrani stav o važnosti ukomponiranja načela poslovne etike u poduzetnički sustav poslovanja te procijeni učinak primjene načela poslovne etike na uspješnost poslovanja i politika poduzeća?</p> |

Izvor: Autor

5. ZAKLJUČAK

Poslovna etika se u nastavnim programima stručnih studija poduzetništva i menadžmenta, afirmirala i nametnula najprije kao izborni, a potom na nekim visokoškolskim institucijama i kao obvezni kolegij, i to najčešće na prvoj ili završnoj godini studija. Kolegij poslovne etike izučava se pod različitim imenima, vrlo često s različitom satnicom i različitim ishodom učenja. Važnost poslovne etike kao nastavnog kolegija potvrđuje se i kroz broj pripadajućih ECTS bodova, koji se kreće u rasponu od 4 do 6 ECTS bodova. Kontinuitet poslovne etike kao nastavnog kolegija nameće potrebu kontinuiranog vrednovanja postojećih programa kako bi se modificiranjem postojećih i uvođenjem novih sadržaja jačala uloga poslovne etike u nastavnim programima, ali i u nastavnim sadržajima drugih kolegija studija poduzetništva i menadžmenta. Brojni sudionici gospodarskoga sustava doživljavaju poslovnu etiku kao opterećenje slobodi poduzetničkog djelovanja, zaboravljajući pri tom da se poslovna etika bavi i zaradom. Da je tome tako, potvrđuje i činjenica da se sve veći broj poduzeća odlučuje angažirati vanjske suradnike (neku vrst etičkih *guru*a) kako bi svoje etičke vrijednosti prenijeli zaposlenicima. Ovim radom želi se skrenuti pozornost na važnost poslovne etike u suvremenoj gospodarskoj praksi. Naime, imidž poduzeća koja se ne ponašaju sukladno etičkim načelima (varaju svoje kupce, zaposlenike, dioničare) često je narušen do te mjere da ugrožava ne samo rast i razvoj poduzeća već i njegov opstanak u tržišnoj areni. Polazište i svrhovitost daljnjeg izučavanja poslovne etike kao kolegija na stručnim studijima poduzetništva i menadžmenta povezana je i s promjenama poduzetničkog obrasca, koje su započete stvaranjem jedinstvenog europskog tržišta, a nastavljaju se daljnjim proširenjem Europske unije. Navedene se promjene očituju u reorganizaciji i širenju poduzetničkih pothvata, koji od nacionalnih prerastaju u regionalne, internacionalne, odnosno globalne.

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TEACHERS' COMPETENCIES LEADING TO THE EFFECTIVE CLASSROOM MANAGEMENT

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Abstract: *Having in mind the new educational environment imposed by actual multicultural society and IT development among other factors, one cannot fail to notice the new generation of students with different aspirations and demands. The students of today are surrounded by devices and gadgets that provide prompt information. The educational system should adapt to the actual reality and keep the pace with the upcoming challenges. Therefore arises the need for development of new teachers' competencies with the ability to respond to demands and needs of the contemporary society. In this paper we suggest the possible solutions to this problem that would be applicable to the new so called "digital natives" of the future.*

Keywords: *teacher's competencies, teacher's role, effective learning, classroom management, digital natives*

INTRODUCTION

The students of today have different references than the previous generations. Mostly they are individualists, consumerists, attached to their mobiles and tablets who feel free and independent in the world of liberal democracy which was impossible a decade or two ago. They are living in the era of Internet Technology surrounded by devices and gadgets that provide prompt information. Social Media and Networking allow them to connect with people all around the globe and share their views and information. The various resources have never been closer to them than today. Accustomed to gain the information with not more than one click on their smartphone or iPad, the 21st century students want prompt information that can be used at the time in the real word. (Živkovic, A, 2018: 325-328)

Goleman (2016) implies that nowadays students are more oriented towards technologies than to other persons. The students use technologies to communicate with others their point of views, interests and attitudes. Impacted by various media of communication and social network, their values, aspirations as well as demands vary and have tendency to change rapidly.

In the world overwhelmed with information arises the need for conceptual and coherent knowledge. The accumulation, selection and coherent synthesis of the information becomes one of teacher's challenge of today. One of the issues in the teacher's job nowadays is to choose relevant content suitable for their students. Therefore, arises the need of developing skills to search for the information, select the most relevant ones, and finally understand and interpret what we have found out. The fact we should never forget is that students do not even have to

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go for the information. On the contrary, the information finds a way to them in the most amusing and interesting forms compared to the scholar ones. The schools seem to fail being the main source of knowledge. The new school should guide, organize and teach the students the most effective ways to learn and socialize themselves.

Having in mind this complex and diverse environment and world standards for teacher competence, in this paper we are proposing some possible changes and additional skills the teacher should have so as to create a conducive environment for the effective learning and classroom management.

TEACHER COMPETENCIES FOR AN EFFECTIVE CLASSROOM MANAGEMENT

At the very beginning we would like to point out the difference between the terms *competence* and *competency*. McConnell (2001:14) describe the term *competence* as a comprehensive concept of capabilities, while *competency* is more specific and narrower concept used to refer to particular abilities and forms as a part of *competence*. In other terms the competence mainly refers to functional areas. On the other hand, competency refers to behavioral areas, describing skills, knowledge, experience, as well as other personal traits or attributes that are necessary for the task or job performance.

Analyzing the behavior of some professors considered good, Muttray and Renaud (1995) find that those teachers tend to speak expressively, move through the class, and tend to be enthusiastic and clear, call the students by their names, ask questions, respect their students and keep good communication with them. Another researcher, Henry (1994), makes the difference between expert teachers (twenty years of teaching exercise) and experienced teachers (sixteen years and over teaching). The studies of Bernieri (1991) indicated the relationship between the student's performance and the interpersonal sensitivity of the teachers. Research by Helmke and Schrader (1991) showed that students learned more if teachers: a) were sensitive, tolerant, and patient; b) were able to adapt to individual differences; c) presented the contents in an interesting and motivating way; d) provided an affective environment, integrating humor and praise; e) presented the information in a clear way and checked if the students understood the matter. The researchers also paid attention to how teacher listen to the students. (Oldfather, 1993:3).

Cano, E. (2007:41) points out that when considering teaching skills, it is necessary to take into account the disciplinary competency, the methodological competency, the social competency and the personal competency, as well as to know how to apply all these competencies integrated in each context. Referring to the university context, Zabalza, M.A. (2007:70-169) proposes the ten teaching competencies as follows:

- to be able to monitor the teaching-learning process
- to select and prepare disciplinary content
- to provide understandable and well-organized information and explanations (communicative competency)
- to manage new technologies
- to design the methodology and organize the activities
- to communicate and interact with students
- to conduct tutoring with students and colleagues
- to evaluate learning and acquisition processes
- to reflect and investigate the teaching, to recognize the weak and strong points for the continual improvement

Having in mind previous research findings, and in regard to competency concept of the authors Bernal Agudo and Texido Saballs (2012), in continuation we propose, in our opinion, the most important teaching competencies that teachers should possess or develop in order to manage the class effectively.

1. Competency to synthesize the information and conceptualize knowledge/interdisciplinary aspect

As the society is making progress accompanied by development in information and communication technology, the new knowledge is being incorporated in different school subjects and programs. One of the challenges of today is to choose the adequate content relevant for our students.

Other possible issue is how to structure this information and organize it in a way that is applicable for students. This aspect implies new teachers' skills and competences, so as to help their students to use the information selectively and make the learning process more effective. Abundance of information and use of ICT in the classroom brings within a need for an interdisciplinary approach to the teaching/learning process.

2. Competency for life-long learning and continual improvement – As we witness the world changing rapidly, we can take it for certain that the knowledge we impart in our schools today is relative and has the expiry date. The learning process needs to keep the pace with these rapid changes making the learning process continual and life-long. One should never stop improving his/her knowledge. In the USA is being speculated the idea of establishing the expiry date for university degrees and possible need for renewing licenses.

3. ICT Competency – Prensky (2011) finds that the role of technology in education is to give support to the “partnering pedagogy” and to enable each student to personalize the learning process.

On the other hand, the integration of technology, and in particular, Internet Communication Technology (ICT) changes the role of teacher, shifting it from earlier information transmitter's role rather to facilitator's or supervisor's role in the learning process. The teaching process is oriented towards the students and their individual needs and interests making the learning process more personalized and unique. (Bernal Agudo; Saballs, 2012:201)

The Information and Communication Technologies (ICT) might represent the powerful tool for improving both efficiency and effectiveness of education. The impact of ICT on learning process mostly depends on teacher awareness of its power as well as on teacher's motivation to implement it in the classroom. The issue we are facing today, according to Prensky (2011), is that while the students are behaving like “digital natives” our teachers behave more like “digital immigrants”, as they still keep adapting to the world of technology, being always one step behind. The challenge of today is how to help our students to better organize and understand the information and continuously transfer it to useful critical knowledge.

The integration of the ICT in education implies the new role of teacher as Information consultant, group coordinator, knowledge facilitator, supervisor. On the other hand, this new learning environment makes student more independent, responsible and collaborative.

R. Davis (2008) points out that possible teachers' dissatisfaction with use of ICT in the classroom does not come from technology itself, but from inadequate training on how this technology should be used.

As proposed by UNESCO (2008), both teachers and students must use the ICT effectively. In this process the main role of the teacher is to help the students to gain these capabilities, and to design learning opportunities. For this task, the teacher needs to be ICT literate and to know to use ICT adequately. Therefore, it is not only necessary to know how to use these tools, but also to know all the potential they bring together, and to know to choose the most relevant one for the application in classroom. The effective teacher nowadays needs to link the way of teaching process with the subject content and relevant technology to be used in the teaching/learning process. This leads to a new teaching approach called TPACK (Technological Pedagogical Content Knowledge). The teachers should support the critical thinking of the students and assist them in developing the cognitive and meta-cognitive skills.

4. **Communication competency** – implies receptive, comprehensive and expressive capabilities. Therefore, different types of communication competency the teacher needs to dominate: *Linguistic competency*, *Didactic communication competency* (ability to establish communicative exchange with pedagogical and didactical effect on students' achievements). Apart from the didactics the teacher should have social and cultural knowledge in order to facilitate the learning process. Exposing subject content in front of the students requires both preparation and reflection. On the other hand, the contemporary teachers are not only transmitting the information, they are rather performing a communicative exchange in form of constant interaction, dialog, or reflection. *Interactive Communication Competency* is more related to emotional and affective aspects. The teacher needs to establish affective relationship with all parties involved in education system, manage conflicts and emotions, which implies good empathic skills and ability to listen to others. *Social Communication Competency* refers to teachers' persuasive capabilities as specific type of communicative skills. The teacher needs to know to how to persuade others as well as to collaborate on social network.
5. **Collaboration Competency** implies that teachers' knowledge has limitations. A teacher is a person and not an omnipotent being who knows everything. Therefore, arises a necessity for collaboration with other teachers. The teachers should work in teams so as to learn from others. Exchanging experience and ideas with others, opens the mind to different possibilities and solutions. The teachers should overcome the old days' habit to give lectures and preach. They should admit to themselves that they need to listen and learn from others, both their colleagues and students alike. Therefore, they should create open and friendly environment that encourages the team spirit, collaboration and mutual respect.
6. **Interpersonal Relationship Competency** – contains two aspects: *relationship with others*, reflected in empathy skills, treating others with respect and affection, negotiation skills, cooperation, active listening, dealing with stress, nonverbal communicative skills; and *Intrapersonal relationship* or self-acceptance, reflected in self-esteem. In teacher-student interaction, the first impression the students have is the emotional structure of the teacher. This is why the teachers' vision of themselves is very important. The teacher who lacks self-esteem will find it very difficult or impossible to build the self-esteem of others, especially when trying to transmit dignity and respect. The relationship in this respect is a complex one, as the teacher establishes connection with group as the entity and needs to communicate individually with each student with special attention to their individual differences.

In the multicultural environment of the XXI century, the diversity is natural occurring. The age of homogenous classroom is behind. The idea is not to provide students with the same possibilities, but, on the contrary, it is to show them different ways and resources for fulfilling their needs and demands.

7. **Leadership competency** – as one of the most important competencies in education, does not imply literally classroom management. It is more like bringing certain dynamics to the class. The teacher should transmit high expectations to students, respond to different demands, assist them in the learning process, transmit trust, create conducive environment. All these is achieved more effectively if the teacher is gifted with certain attributes such as:
- Charismatic / Idealized influence
 - Individualized consideration
 - Intellectual stimulation
 - Inspirational motivation
 - Psychological tolerance
 - Participations
 - Innovation

It is not important what and how they teach, but how they treat their students as well. The teacher not only teaches by what is he/she saying, but also by what is he/she representing. The teacher educates by relationship established with students, and friendly and creative conditions. As a leader, teacher should implement ideas for change and improvement.

CONCLUSION

The teachers should not only consider what to teach but even more important what and how their students are going to learn in the most effective way. That way they should be more focused on the learning process of their students and ways to make the subject they teach more attractive and amusing. In order to achieve this proactive and participative teaching/learning process, the teachers should direct their attention to the students and their way of learning. By teaching focused on teacher, as we had in past with ex cathedra lectures, the whole learning process consisted of exposing the subject, and then being memorized and comprehended by students. By directing our focus on students and the process of learning itself, we foment their active involvement in teaching/learning process, collaboration and independence. Drawing our attention to students implies adapting to their context and habits, which means that implementation of the ICT in the teaching/learning process is something that today goes without saying.

The possibility to reach the information in an easy way makes the digital natives pretty sure that the obtained information is the relevant and true one. On the other hand, this creates illusion that they easily become experts for certain matter of their interest. As we all know, the unlearned lesson is a problem, and wrongly learned lesson makes it double. The teacher, therefore, has an additional task, which is to teach the students in the most adequate way. That can only be achieved if the teacher and students speak the same language, and for that we need new competencies adaptable to the ICT era, but also some old ones that could be adapted.

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INTEGRATED POLITICS IN SOCIAL ASSISTANCE SERVICES STUDY CASE: THE PUBLIC SOCIAL ASSISTANCE SERVICES IN ROMANIA

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Abstract: *The paper is focused on understanding the social assistance services after decades of dictatorship ending in 1989 in which Romania had no coherent specific services. This paper is a part of a large project still in progress; in this presentation, the information was obtained by applying several interviews in 21 different cities and villages from Romania and in identifying and assessing the social needs of individual, family and/or groups in a particular administrative area. Our results will underline the main social problems identified and highlight the need for improving the social services in Romania (and especially in Brasov County) and try to identify some solutions to the problems we face in Romania now after 29 years from the crash of the communist regime.*

Key-words: *social services, social assistance, social needs, family.*

1. INTRODUCTION

The problem of social assistance services remains three decades after the removal of the communist regime, as it is known Romania did not have consistent social services before 1989.

This paper is a part of a broader project which is centered on the theme of which is called: Map of Social Issues and the Need for Social Services in Brasov County. Priority directions on development of social services in Brasov.

The team working on this project is coordinated by the Faculty of Sociology and Communication. The team is made up of seven people, all professors at Transilvania University of Brasov, Romania and are an interdisciplinary team specializing in the following fields: social work, sociology, political and legal sciences, and economics.

This project meets the needs of the local community by taking into account that the social level we assist is increasingly confronted with a diverse set of issues, those being a result of national politics in the social assistance services. The overall objectives of the project are: to identify the main social problems in the county of Brasov; identify the needs of social services in the county of Brasov; and, establishing priority decisions for the development of social services in Brasov County.

We will extrapolate upon the results recorded at the national level, considering that Brasov County is one of the largest in Romania and it can provide a consistent representativeness through the issues which arise.

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This project was necessary given the absence of data on local social problems as well as the needs of certain vulnerable groups and the availability of services. This scientific approach aims at mapping the social problems in the county of Braşov and, in order to be unitary, systemic, we will take into account the application of the methods and tools of research in both urban and rural areas, and as well the statistical data and new data of a qualitative nature, which also provides an interpretative perspective on the issues addressed. In the end, this map can be a useful tool for decision-makers of local and public authorities, and in establishing the priority decisions regarding the development of social services in Braşov County. As well, we ask: “why not rethink social policies at local and even national levels?” The need for local identification and assessment of social problems is mentioned in the National Strategy on Inclusion and Poverty Reduction (2015/2020), which is considered a problem that results in poor monitoring and adequacy of social services to the needs of the community. This project works to ameliorate this problem as well.

As we mentioned before, this paper is a part of a large project that is in progress. In this presentation, we'll use the information obtained by applying several interviews from 21 different cities and villages from Romania by identifying and assessing social needs of the individual, family or group in a particular administrative area. A semi-structured interview method was used and was applied with social workers of public institutions providing social services, those being located in both urban and rural areas.

2. THE PUBLIC SOCIAL ASSISTANCE SERVICES IN ROMANIA - DISCUSSION/ANALYSIS

Considering the theme of the project: “Social Issues Map and the Need for Social Services in Brasov County”. Our research focuses on a specific response to solving social problems and implicitly on "developing individual, group or collective capacities to meet social needs, the quality of life and the promotion of the principles of cohesion and social inclusion" [1, Article 3], namely that offered by the social assistance system as a subsidiary component of the social protection system.

The Romanian government oversees policies in the field of social protection and fulfils the following main duties: policy and legislative competences in the field of social policy (social protection and social security); evaluation and monitoring of policies in progress; coordination and monitoring of the implementation of social policies dealing with children's rights, family issues, people with disabilities, the elderly, victims of domestic violence, vulnerable groups, people at risk of poverty and social exclusion; organisation and coordination of the process of accreditation of social services; monitoring the work of the authorities and institutions with responsibilities in the area of social assistance; management of pensions and social insurance; management of State aid and so on [2].

In Romania, the social assistance system consists of the social assistance benefits system and the social services system and represents the "whole set of institutions, measures and actions by which the state, represented by the central and local public administration authorities, as well as the civil society, intervenes for preventing, limiting or removing the temporary or permanent effects of situations that may lead to marginalization or social exclusion of the person, family, groups or communities" [1, Article 2]. This last part of the definition clearly defines the category of social issues that we will focus on in our methodological approach.

Of the two components of the social assistance system, social services are those that can represent a specific, local (e.g. Brasov County) response to the existing problems, as they are "organized and given at the community level", responsibility for the organization, administration and granting of social services belonging to the local public administration authorities [3, Article 40]. Social services can be a specific/local response to social issues as long as they are based on identifying and assessing individual, family, or group social needs in a particular administrative area.

According to [1, art. 27], social services are understood to mean "the activity or the set of activities carried out in order to meet social, as well as special, individual, family or group needs in order to overcome difficulties, prevent and combat the risk of social exclusion, promote social inclusion and increasing the quality of life."

According to the Romanian legislation, the General Directorate for Social Assistance and Child Protection ensures at the county level the implementation of policies and strategies of social assistance in the field of child, family, lone, elderly, disabled and other persons in need. At the county level, the General Directorate of Social Assistance and Child Protection is in charge of providing social services, this direction operates within the County Council. Knowing the specifics of social issues in a given area (e.g. the county) and implicitly knowing an assessment of social needs at a local level allow a clearer identification of the necessary social services, and the more appropriate use of existing resources or their more efficient distribution is favored.

Regarding the statistics, the city of Brasov occupies, according to the National Institute of Statistics, the fourth place in the top cities of Romania with the best standard of living, being one of the prosperous regions in Romania. Bucharest is in top and practically the most capable region to support a model service system where major social problems still faced by many of its inhabitants find solutions comparable to those in other European capitals. However, social issues do not know administrative boundaries, so collaboration between sectors in this area is very important [4].

The strategic planning of social services in Romania is based on the evaluation of the stage of social services development starting from three large categories of beneficiaries of social services: 1) children - according to the Romanian child legislation means the person who has not reached the age of 18 and has not acquired full exercise capacity, according to the law [5, art. 4]; 2) elderly persons, for the purposes of this law, persons who have reached the statutory retirement age [6]; and 3) adults in vulnerable situations defined according to OG 68/2003, other than those mentioned above, including among others: people with disabilities, drug addicts, alcohol or other toxic substances, people who have left penitentiaries, people affected by domestic violence, victims of trafficking in human beings, without income or low income, immigrants, homeless people, chronic ill people, people suffering from incurable diseases, as well as other people in situations of social need.

Changes in the social care system in Romania came as a necessity for the people as solving the social problems is a highly bureaucratic and institutionalized process. The field of social assistance, especially social services, is one in which the reform has penetrated rather heavily, is initially carried out in response to the need for deinstitutionalization, promoted both to respect the rights of individuals in institutions and to reduce costs and increase the quality of service [7, p. 8].

In the last decade, the system's evolution in Romania had been focused on the development of social services trying to respond to the needs of the beneficiaries and improve the specific services. Since 2001, Romanian reform in the field of social welfare services has focused on decentralization and the unified approach to social issues. The Social Assistance Framework Act of 2001 brought the focus on preventative services, organized at the community level, so as to allow the access of as many beneficiaries as possible. This was necessary for the absence of a primary social service network, although the specialized services had developed to a much greater extent. Changing the range of social services offered to beneficiaries by public institutions occurs in the conditions in which the NGO sector in Romania has developed a series of models in this respect that could be later taken over by the public sector. These models of social services developed by the NGO sector have led to the need to change existing services in the public sector. The most important area of social assistance where the reform was rapidly implemented was in services provided to children. Here the reform has evolved rapidly from the deinstitutionalization of children to the provision of alternative support services and the prevention of abandonment.

Through the decentralization process, local authorities received the entire responsibility to develop and provide community based services as they are closer to citizens and their needs. Nevertheless, the policy's implementation is done in partnership by the central and local governments. One example is the budgetary allocation from state budget of sums with special destination to authorities at the national level: the child protection system and the social assistance centers for persons with disabilities. Other financial support mechanisms, some of them mentioned before, are: state budget subsidies, national interest programmes, investment programmes, emergency aids. Beyond the financial aspect, in Romania there is a continuous collaboration, assignment of responsibilities and financial obligations between central government institutions and local authorities concerning social.

Changing the legal framework has allowed the creation of decentralized services and the start of the implementation of the concept of parental responsibility and the local community in raising and educating children, the state having a subsidiary role. Law 272/2004 aims to reinforce services to prevent child separation from its parents and to reorganize various childcare centers. Order no. 219 / 15.06.2006 is centered on the activities for identifying, intervening and monitoring the children who are deprived of the care of the parents while they are at work abroad.

Specific legislation in Romania is Social Assistance Law no. 292/2011 (amended by Government Ordinance no 30/2015) with subsequent amendments and completions; Government Ordinance no. 68 of 28 August 2003 on social services, as subsequently amended and supplemented; Law no. 17 / 03.03.2000, republished on social assistance for the elderly; Government Decision no. 886 of October 5, 2000 [8], for the approval of the National Grid for Assessing the Needs of the Elderly. Order no. 2126 / 05.11.2014 regarding the approval of minimum quality standards for the accreditation of social services for the elderly, the homeless, the young people who have left the child protection system and other categories of adult people in difficulty, as well as for the services rendered in the community, services provided in integrated system and social canteens [9].

In Romania, social services for adults are mainly offered to the people with disabilities and the elderly. Law 448/2006 (updated in 2008) [10] regulates the number of services and benefits provided to people with disabilities and for the elderly people, law 17/2000 (modified

successively in 2007 and 2018) defines the services and benefits granted to elderly people in need.

Returning to the project that is behind this article, this summer (2018) we conducted research of 21 interviews with social workers from 21 town halls of Brasov County, as well some questionnaires applied to the social services beneficiaries.

The interview guide used was focused on five major topics of discussion that took into account: 1) Problems city/town/village; 2) Currently existing solutions (services, projects, institutions); 3) Funding sources; 4) Unresolved issues - the proposed solutions; 5) Profiles of the social workers.

From the analysis of the 21 interviews offered by the practitioners, the most important problems faced by the towns of Brasov County are as follows: school dropout; disinterest towards education; the lack of jobs; disinterest in finding a job; domestic abuse and violence; lack of local infrastructure; increasing numbers of people with disabilities; the lack of social services in some cities (eg centers for the elderly and children); external migration (in countries such as England, Italy, Spain, France); internal migration (in other cities that provide social support); the lack of financial education (as a direct consequence of the lack of education, school abandonment); the level of education of family members (many illiterate families); poor education (many families do not consider important education); parent model (many disorganized families); the attitude towards work (the refusal of jobs from convenience, the lack of studies attesting the qualification in work); preference for social assistance (provides a minimum monthly financial income, medical insurance); staying in poverty (lack of studies, lack of jobs perpetuates poverty); social imbalances (parental model copying, illiteracy leads to school abandonment and other correlative issues, such as minor mothers without support, etc.); legislative changes are required (to make the beneficiaries responsible, to limit the period of social services, as the law now encourages laziness); increasing the involvement of the relevant institutions (local community, town hall, mayors, local councilors, school, church, family doctors, parents).

3. FINAL CONCLUSIONS

Again, regarding the statistics, the city of Brasov occupies the fourth place in Romanian cities with the best standard of living, being one of the most prosperous regions in Romania.

The map of the issues can be a useful tool for decision-makers at the local level and public authorities in establishing the priority directions regarding the development of social services in Braşov county and asking why to not rethink social policies at the local and even national level.

Undoubtedly, the social issues identified represent a significant discrepancy between the social norms and the actual social reality that require finding and implementing more efficient solutions.

We can prospect future solutions to conduct regular assessments of people's needs in order to identify social (as we succeed by this project at the county level of Brasov). Regular reviews of compliance with quality standards both to public entities providing social services, and as well as publicly funded private providers and the evaluation of the effects of social services so that they can be improved periodically.

In conclusion, we consider that in order to tackle the poverty and the risks of marginalisation and to improve the living conditions of the children and young, the elderly and disabled people it is important that the involvement of various actors, such as the central government and local government institutions, civil society representatives including advocacy or service provider NGOs, as well as citizens or beneficiaries associated in different types of representative organisations.

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HOW CAN CULTURE LEAD TO SUSTAINABILITY

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Summary: *It is no doubt that our society is a consumerist society. Perpetuating this situation will lead to conflicts (wars) and will end in ecological disaster. This paper intends to underline the importance of culture in molding ideas and actions so that we could move from consumerism to sustainability. Two of the cultural aspects that can have a direct impact on people in helping developing sustainability are education and religion. Education from an early age towards sustainability, reorienting the curricula and implementing a new lifestyle that is close to nature can have benefits for the coming generations. Meantime, religion should play a more important role in relating its values to nowadays problems. From liturgy to social service, religions can promote values that lead to sustainability.*

Keywords: *sustainability, culture, education, religion*

OVERVIEW

It is a fact that in order to have sustainability one must find practical ways to obtain it. Man lives in the realm of culture and is, in a certain manner, a product of culture. Culture can shape decisions and create behavior patterns that lead to sustainability.

Culture can be defined as a way of life, especially the general customs and beliefs of a particular group of people at a particular time. Culture is understood as the characteristics and knowledge of a particular group of people, encompassing language, religion, cuisine, social habits, music and arts. Every human society expresses these, in institutions, and in arts and learning.

Culture contributes to the development of mankind. It is obvious that not any kind of development is good in long-term. Sustainable development is development that meets the needs of the present without compromising the ability of the future generations to meet their own needs [1]. Countless choices in human lives are reinforced, driven by, or stem from traditions, whether religious traditions, rituals, cultural taboos, or what people learn from elders and their families [2].

United Nations define sustainable development as development that meets the needs of the present without compromising the ability of future generations to meet their own needs. Sustainable development calls for concerted efforts towards building an inclusive, sustainable and resilient future for people and planet [3].

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Sustainability takes into account how natural system functions. It acknowledges that human civilization takes resources to sustain our modern way of life. Sustainability takes into account how we might live in harmony with the natural world around us, protecting it from damage and destruction. There are three pillars of sustainability: economic development, social development and environmental protection [4].

In 2012, the United Nations Conference on Sustainable Development met to discuss and develop a set of goals to work towards; they grew out of the Millennium Development Goals that claimed success in reducing global poverty while acknowledging there was still much more to do. It eventually came up with a list of 17 items which included amongst other things:

- The end of poverty and hunger;
- Better standards of education and healthcare - particularly as it pertains to water quality and better sanitation;
- Sustainable economic growth while promoting jobs and stronger economies
- Sustainability to include health of the land, air and sea [5].

We will tackle two areas that belong to the cultural realm and see how these can shape attitudes toward sustainability: education and religion.

EDUCATION

Habits, values, preferences are shaped to a large degree in childhood. Education can have a transformative effect on learners. Incorporating sustainability education into teaching, training and school curricula and providing lifelong opportunities to learn about sustainability will be essential in cultivating societies that will thrive long into the future. The key will be to expand programs and embed them deeply into leading educational institutions.

Early childhood education can help build a culture of sustainability if it is framed in terms of sustainable development, if curriculum and pedagogical guidelines are oriented toward education for sustainability, if staff training in this field is reinforced, and if patterns and communities are involved in the process [6].

The project approach is a teaching strategy that addresses children's intellectual dispositions, allowing children to examine the basis of their own opinions, ideas and assumptions. This strategy will help them examine the behaviors of their own cultures and others in terms of implications for sustainable development [7].

Marketing is linked to a host of public health and social problems facing children today. The World Health Organization and other public health institutions identify marketing to children as a significant factor in the worldwide epidemic of children obesity. In addition, advertising and marketing have been associated with eating disorders, sexualization, youth violence, family stress and underage alcohol and tobacco use [8].

Thus, the ability to play creatively is central to the human capacity to experiment, to act rather than react and to differentiate oneself from the environment. Play promotes attributes essential to a democratic populace, such as curiosity, empathy, cooperation and a sense of competence, a belief that the individual can make a difference in the world. Constructive problem-solving, divergent thinking and the capacity for self-regulation are all developed through creative play [9].

The fervor of government deregulation that began in the United States in the 1980s, in combination with digital revolution, has resulted in an unprecedented escalation of commercialism in the lives of children. In 1983 U.S. markets spent \$100 million targeting children. Today we speak of \$17 billion. While much of the impetus from marketing to children originates in the United States, the trend is promulgated worldwide by multinational corporations. Food companies alone spend about \$1,9 billion annually for marketing directly to children around the world [10].

The underlying message of nearly all marketing is that things people buy will make them happy. Aside from the fact that research on happiness shows this to be false, immersing children in the message that material goods are essential to self-fulfillment promotes the acquisition of materialistic values, which have been linked to depression and low self-esteem. Research shows that children with more materialistic values are also less likely to engage in environmentally sustainable behaviors such as recycling or conserving water [11].

Previous generations took it for granted that children used their leisure time to play. But that is no longer true. Play is an endangered species, and there needs to be conscious, concerted effort to save make-believe for future generations. The consequence of millions of children growing up deprived of play is a world bereft of joy, creativity, critical thinking, individuality and meaning. Children should spend time in nature and play. Meanwhile they should spend less time watching TV, and interacting on internet. Schools should refocus their final goals. Also, institutions of higher education – like all schools – must aim to create an ecologically literate and ecologically competent citizenry, one that knows how earth works as a physical system and why that knowledge is vitally important to them personally and to the larger human prospect.

Educators are obliged to tell the truth about such things but then to convert the anxiety that often accompanies increased awareness of danger to positive energy that can generate constructive changes. To be effective on a significant scale the creative energies of the rising generations must be joined with strong and bold institutional leadership to catalyze a future better than the one in prospect.

RELIGION

Over the past two decades, the indicators of engagement on environmental issues by religions and spiritual traditions have grown. Opinion polls reveal increased interest in such developments. Faith communities are potentially an influential gateway to discussions about environmental protection. A 2009 poll found that 72% of Americans say that religion beliefs play at least a somewhat important role in their thinking about the stewardship of the environment and climate change [12].

Personal consumption continues upward even in wealthy countries and consumer lifestyles are spreading rapidly to newly prospering nations. Few institutions exist in most societies to promote simpler living and those that do have little influence. So, sustainability advocates have looked to religions for help, such as in the landmark 1990 statement “Preserving and Cherishing the Earth: An Appeal for Joint Commitment in Science and Religion” led by Carl Sagan and signed by 32 Nobel Laureates [13].

Simplicity and anti-consumerism are promoted by the teachings of the church, for example Pope Benedict’s July 2009 encyclical *Charity in Truth* [14], a strong statement on inequities engendered by capitalism and the harm inflicted on both people and the planet.

Religion can practically contribute to a culture of sustainability.

Religion can educate about the environment. As religious traditions embrace the importance of the natural environment, it makes sense to include ecological instruction in religious education, as many church teachings include social justice dimension. Teaching nature as “the Book of Creation” and environmental degradation a sin of which man is responsible, is key to moving people beyond an instrumentalist understanding of the natural world.

Religion can educate about the consumption. In an increasingly “full world” in which human numbers and appetites press against a natural limit, introducing an ethic of limited consumption is an urgent task [15].

Religion can educate about investments. Many religious institutions avoid investments in weapons, cigarettes or alcohol. Why not also steer funds toward sustainability initiatives such as solar power?

Religion can express the sacredness of the natural world in liturgies and rituals. The most important assets of a faith tradition are arguably the intangible ones. Rituals, customs, and liturgical expressions speak to the heart in a profound way that cognitive knowledge cannot.

Also, religion can reclaim forgotten assets. Religious traditions have a long list of little-emphasized economic teachings that could be helpful for building sustainable economies. These include prohibitions against the overuse of farmland and pursuit of wealth as an end in itself, advocacy of broad risk-sharing, critiques of consumption, and economies designed to serve the common good. Much of this wisdom would be especially helpful now, as economies are being restructured and as people seem open to new rules of economic action and a new understanding of ecological economics.

Often painted as conservative and unchanging institutions many religions are in fact rapidly embracing the modern cause of environmental protection. The greatest contribution the world’s religions could make to the sustainability challenge may be to take seriously their own ancient wisdom on materialism. Combined with the newfound passion of many religious for healing the environment, this ancient wisdom could help create new and sustainable civilization.

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REALIZACIJA POSLOVNIH MOGUĆNOSTI U TURIZMU NA PODRUČJU LIKE I GORSKOG KOTARA

REALIZATION OF BUSINESS OPPORTUNITIES IN TOURISM IN THE SCOPE OF LIKA AND GORSKI KOTAR

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Sadržaj: *Republika Hrvatska turistička je zemlja s dugom tradicijom, prvenstveno orijentirana na priobalna područja, a nedovoljno na kontinentalna. U ovom radu se na temelju analiziranih podataka te kalkulacija pokazuje na koji način se kroz Liku i Gorski kotar može ostvariti turistički potencijal kontinentalnog dijela Republike Hrvatske, a koji je dosad nažalost nepravedno zapostavljen. Destinacije su obrađene kroz kvantitativnu i kvalitativnu analizu, prikazujući vrijednosti i potencijale nedovoljno valorizirane. Destinacije Lika i Gorski kotar otvaraju mogućnosti za razvoj održivog turizma kroz energetske učinkovitost, odnosno racionalno korištenje prirodnih resursa. Energetska učinkovitost ne predstavlja samo turistički već i svjetski trend. Time se otvara mogućnost razvoja održivog turizmu kroz energetske učinkovite kuće za odmor i popratne aktivnosti te time kontinentalne destinacije dobivaju na vrijednosti.*

Ključne riječi: *Republika Hrvatska, kontinentalni turizam, destinacije, poslovne mogućnosti, energetska učinkovitost, održivi turizam*

Abstract: *The Republic of Croatia is a tourist country with a long tradition, it's primarily oriented on coastal areas and not enough on the continental. This thesis, based on analyzed data and calculations, focuses on multiple ways to realize tourist potential of the continental portion of the Republic of Croatia through Lika and Gorski kotar, which was wrongfully neglected. Lika and Gorski kotar have been analyzed using qualitative and quantitative analysis; the results show the values and potential that were insufficiently evaluated. These destinations open up possibilities of developing a sustainable tourism through energy efficient and rational usage of natural resources. Energy efficiency doesn't represent just a tourist but a global trend. This gives the opportunity to develop sustainable tourism through energy efficient houses and complementary activities which bring great value to continental destinations of the Republic of Croatia.*

Keywords: *Republic of Croatia, continental tourism, destinations, business opportunities, energy efficiency, sustainable tourism*

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Republika Hrvatska je zemlja je s bogatom kulturno-povijesnom baštinom te iznimnim prirodnim atrakcijama. Govoreći o hrvatskom turizmu, obično se prvo pomisli na Istru, dalmatinske gradove i otoke te Dubrovnik. Razlog je tomu što je na ovim područjima najveći broj turista te se i najviše ulaže u spomenute destinacije. Kontinentalnom turizmu se pridaje nedovoljno pozornosti iako je zaslužuje puno više. Važno je naglasiti da se u kontinentalnom dijelu Hrvatske kriju skriveni dragulji koji samo čekaju da budu otkriveni. Jedan od tih dragulja je područje Ličko-senjske županije.

Područje Like i Gorskog Kotara ima izniman potencijal za ostvarivanje poslovne mogućnosti u turizmu te ovaj rad to želi i prikazati. Uz trud i želju za napretkom moguće je turistički osnažiti ovu županiju te za više strana donijeti koristi; otvaranjem novih radnih mjesta potaknulo bi se mlade na rad u vlastitoj zemlji, a samim time i država bi profitirala te se popela na vrhove ljestvica za najposjećenije destinacije. Razvijanjem kontinentalnog turizma moglo bi se parirati visoko razvijenim zemljama zapada.

LIKA I GORSKI KOTAR KAO TURISTIČKE DESTINACIJE

Lika je regija koja se nalazi na jugozapadu Republike Hrvatske. Smještena je između Velebita te Plješevice i Kapele. Govoreći o prostornom smještaju, teritorijalno pripada Ličko-senjskoj, Zadarskoj te Karlovačkoj županiji. Površina Like iznosi 6.753 km², što čini gustoću od 8 st/km² te 11% cjelokupnog teritorija Republike Hrvatske. [4] Lika i Gorski Kotar kontinentalne su regije Republike Hrvatske koje karakteriziraju hladne zime, čist zrak, plodno tlo, vrijedno stanovništvo, no i slabo naseljeno područje s jako lošom socijalnom strukturom. Prednosti ovog područja ima puno te time predstavljaju turistički i gospodarski potencijal cjelokupne države.

Kvantitativna analiza Like i Gorskog kotara kao turističke destinacije

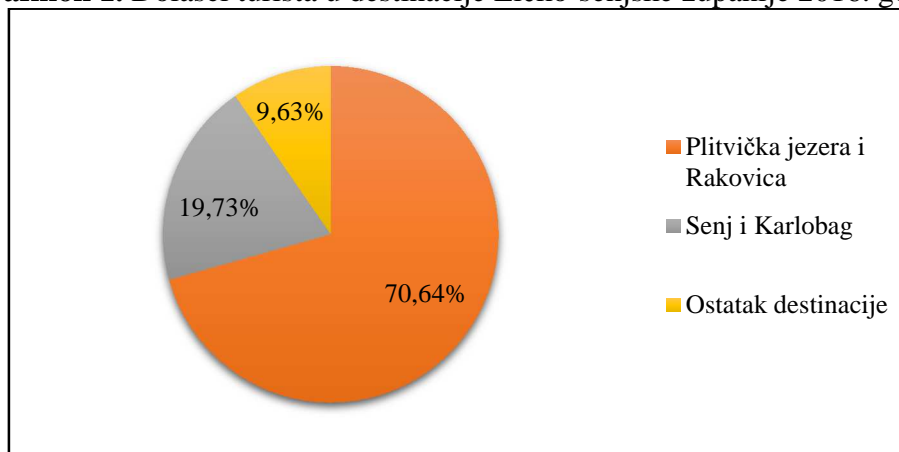
Prema podacima Ministarstva turizma, 2016. godine 561.510 turista posjetilo je Ličko-senjsku županiju što čini samo 3,44% od ukupnih dolazaka u Republiku Hrvatsku, a od tih 3.44% čak 70.64% odlazi na posjetitelje koji dolaze u Plitvička jezera. [5]

Tablica 2. Dolasci turista u destinacije Ličko-senjske županije 2016. godini

| Odredišta turista | Broj turističkih dolazaka |
|-----------------------------|---------------------------|
| Plitvička jezera i Rakovica | 396.657 |
| Senj i Karlobag | 110.785 |
| Ostatak destinacije | 54.068 |
| Ukupno | 561.510 |
| Ukupno RH | 16327.242 |

Izvor: Ministarstvo turizma Republike Hrvatske, www.mint.hr, preuzeto 5.7.2018.

Navedena tablica pokazuje da se najveći broj turističkih dolazaka na području Ličko-senjske županije 2016. godine odnosio na mjesta Plitvička jezera i Rakovica, a nešto manji broj na Senj i Karlobag.

Grafikon 1. Dolasci turista u destinacije Ličko-senjske županije 2016. godini

Izvor: Ministarstvo turizma Republike Hrvatske, www.mint.hr, preuzeto 4.7.2018.

Govoreći o turističkim dolascima na području Ličko-senjske županije, iz navedenog grafikona saznaje se da 70,64% dolazaka čine dolasci u Plitvička jezera i Rakovicu, manji dio odnosi se na Senj i Karlobag, a ostatak se odnosi na druge dijelove destinacije.

Iz navedenih podataka jasno je da unutar same županije postoji neravnomjeran razvoj različitih dijelova te da se samim time i turizam slabije razvija u određenim dijelovima. U sljedećoj se tablici prikazuju trokvartalno ostvarenje turističkih dolazaka i noćenja u Ličko-senjskoj županiji za 2016.godinu.

Tablica 3. Ostvareni turistički dolasci i noćenja u Ličko-senjskoj županiji, u razdoblju 1.-9. mjeseca 2016. godine.

| OPIS | 2016. | | | 2015. | | |
|----------------|----------------|------------------|--------------|----------------|------------------|--------------|
| | Broj | Noćenja | Udio (%) | Broj | Noćenja | Udio (%) |
| Strani turisti | 561.303 | 2.384.884 | 84,8 | 507.828 | 2.043.895 | 95,1 |
| Domaći turisti | 38.824 | 426.163 | 15,2 | 28.229 | 104.917 | 4,9 |
| UKUPNO | 600.127 | 2.811.047 | 100,0 | 536.057 | 2.148.812 | 100,0 |

Izvor: Hrvatska gospodarska komora, www.hgk.hr, preuzeto 4.7. 2018.

Kvalitativna analiza Like i Gorskog kotara kao turističke destinacije

Iako je općeprihvaćeno da je Lika „goli kamen bez života“, što je djelomično točno jer je najveći dio građen od dolomita i vapnenca s brojnim poljima u kršu (Ličko, Krbavsko, Gacko, Koreničko, Lapačko), činjenice potvrđuju da se radi o potpunoj suprotnosti - jednom od hrvatskih bisera koji obiluje biljnim i životinjskim vrstama. Radi se o području koje je nedovoljno valorizirano i primijećeno. Dvije najveće rijeke ponornice na ovom području su Lika i Gacka. Hrvatski alpinist i speleolog Stipe Božić ove rijeke naziva „krškim ljepoticama“ što je i jasno zašto s obzirom na brojne prednosti koje donose ovdašnjem stanovništvu; primjerice ribolov, plovidba kanuima, mlinovi, vodoopskrba. Također, u kanjonu rijeke Like izgrađena je brana akumulacijskog jezera Kruščica. „Rijeka Gacka je jedno od mnogih, još neotkrivenih blaga Hrvatske. Zbog čistoće vode i bogatog biljnog i životinjskog svijeta zovu je draguljem Like.“ [6]

Mogućnosti je bezbroj, a mogu se ostvariti uz dovoljno truda, financijskih sredstava te podrške lokalne zajednice i suradnje s istom. Preduvjete kakve ovaj kraj ima, rijetko se koji može pohvaliti, no izostaje motivacije i potpore. Kao što je već navedeno u tekstu, stanovništvo je

demotivirano te jako inertno što u startu koči bilo kakav razvoj. Primjerice, Švicarska nema ni sunce ni more, a hrvatski Velebit može ljepotom parirati švicarskim Alpama, a turizam je među najrazvijenijima u Europi.

Tablica 4. SWOT analiza Like i Gorskog kotara kao turističke destinacije

| Snage | Slabosti |
|---|---|
| <ul style="list-style-type: none"> • Dobra povezanost s glavnim gradom Republike Hrvatske te ostatkom države • Blizina priobalnih mjesta kao što su Karlobag i Starigrad-Paklenica • Netaknuta i čista priroda • Vrijedno stanovništvo • Velik potencijal za razvoj u turističkom smislu • Bogatstvo domaćih proizvoda kao što su rakija šljivovica i sir škripavac | <ul style="list-style-type: none"> • Nedovoljna razvijenost prostora • Opustošen kraj • Loša socijalna struktura stanovništva • Pasivno stanovništvo • Nedovoljna valoriziranost prostora |
| Mogućnosti | Prijetnje |
| <ul style="list-style-type: none"> • Promocija i brendiranje destinacije i njenih proizvoda • Ponuda bicikala i quadova te vođenih tura • Pješačke i planinarske staze • Suradnja s mladim poduzetnicima iz cijelog kraja i države • Ponuda izleta te kušanja domaćih prehrambenih proizvoda • Više manifestacija kao što je „Jesen u Lici“ • Poticanje mladog stanovništva za ostanak te pokretanje vlastitog posla u suradnji s lokalnom zajednicom • Održivi turizam | <ul style="list-style-type: none"> • Propadanje poljoprivredne zemlje • Odlazak mladog stanovništva iz cjelokupne zemlje pa i ličkog kraja • Nedovoljno kvalitetnih smještajnih kapaciteta • Slaba i nedovoljna promocija |

Izvor: prijedlog autora

Iz navedenih podataka te obrađene SWOT analize Like i Gorskog kotara, vidljivo je kako su glavne snage te samim time i prednosti ovog kraja, dobra povezanost s ostatkom Republike Hrvatske te time i blizina priobalnih mjesta, te netaknuta i čista priroda koja otvara mogućnost turističkog razvoja te napretka cjelokupnog kraja. Ta činjenica otvara mogućnost izleta u priobalne krajeve te lakoću dolaska u Liku i Gorski kotar. Najveću opasnost predstavlja odlazak mladih iz cjelokupne države, a iz ovog kraja pogotovo što za sobom ostavlja isključivo stariju populaciju koja nije u mogućnosti nešto pokretati niti se baviti poljoprivredom.

MODEL KUĆE ZA ODMOR I PRIMJER ODRŽIVOG TURIZMA U MJESTU NA PODRUČJU LIČKO SENJSKE ŽUPANIJE

Budući da Lika kao kontinentalna regija predstavlja veliki potencijal za hrvatski turizam, način na koji se taj potencijal iskoristi od presudne je važnosti. Kućom za odmor koja predstavlja bazu održivog turizma, taj potencijal se u potpunosti iskorištava te podiže svijest da za razvoj nisu potrebni megalomanski hoteli te milijunski iznosi već puno volje i kvalitetan plan s jasnim ciljevima. Primjer kuće za odmor u mjestu Smiljan primjer je iskorištavanja punog potencijala određenog prostora na način da se ne šteti okolišu i domicilnom stanovništvu. Smiljan je mjesto koje je snažno povezano sa županijom.

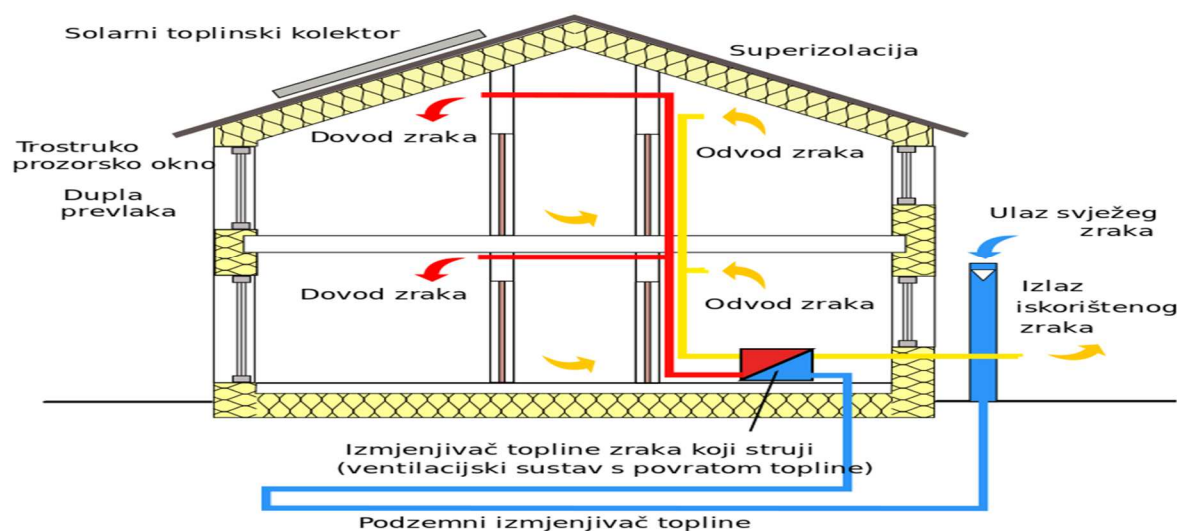
Govoreći o Smiljanu, često se zaboravlja činjenica da predstavlja jedan od brendova ličkog područja. Naime, svjetski poznat znanstvenik i izumitelj te čovjek zaslužan za to što danas imamo izmjeničnu struju, rođen je u ovom mjestu. Nikola Tesla rođen je 1856. godine u

Smiljanu. [7] U čast ovog iznimnog znanstvenika i čovjeka grad Gospić je 2006. godine povodom 150 godina njegovog rođenja svečano otvorio Memorijalni centar „Nikola Tesla“. Ovaj memorijalni centar zaslužan je za sve veći broj turista koji odlučuju osjetiti ovo malo mjesto, baš zbog samog Tesle.

Budući da je riječ o Lici koja obiluje prirodnim bogatstvima i može se pohvaliti ne pretjeranoj izgrađenosti, betonizaciji te onečišćenjima koji dolaze sa svime, takav potencijal može se iskoristiti tako da se prije gradnje kuće za odmor misli na pametna rješenja kao što su primjerice solarni kolektori, termo fasada te korištenje materijala čije korištenje minimalno šteti okolišu. Ušteda energije postiže se na nekoliko načina, a jedan od njih je postavljanje izolacije od celuloze koja je iznimno učinkovita, a ne šteti okolišu.

Kada se govori o energetskej učinkovitosti i nisko energetske kućama važno je znati kategorizaciju energetske učinkovitosti te što ona znači u samoj praksi. Budući da su materijali bili nekvalitetni, a procesi nestandardizirani, koristila se velika količina energije koja je značila i više utrošenih novaca i drugih resursa. „Energetski zahtjevi takvih zgrada su ponekad veći od 400 kWh/m² godišnje, dok prosječna godišnja potrošnja energije za grijanje u klasično građenim zgradama iznosi 200 kWh/m² (100 kWh = 8,5 litara lož-ulja = 10,8 m³ plina).“ [8] U posljednjih nekoliko godina koristi se podjela na 3 stupnja energetske učinkovite gradnje; zgrade se dijele na nisko energetske, pasivne i 0-energetske. "Nisko energetske zgrade su one koje na godišnjoj razini troše manje od 40 kWh/m². Pasivne zgrade imaju godišnju potrošnju ispod 15 kWh/m². To je potrošnja koju je moguće ostvariti u svim krajevima naše zemlje, na svim tipovima zgrada, s tehnologijom koja je već danas prisutna u zemlji i čija je cijena unutar pet do petnaest godina isplativosti.

Slika 1. Shema pasivne kuće



Izvor: www.gradnja.dportal.info, preuzeto 7.8.2018.

Cilj pasivnih kuća je da same stvaraju toplinu odnosno uklanjanje gubitaka i maksimalizacija slobodnog dobivanja energije. Kuća se gradi bez aktivnog sustava grijanja ili klimatizacije te se postiže optimalna temperatura i zimi i ljeti. „Pasivna kuća, brojčano izraženo, visoki stupanj udobnosti postiže potrošnjom energije za zagrijavanje ne većom od 15 kWh/m² ili 1 litru lož ulja po m² odnosno 80-90% manje energije od klasične kuće godišnje.“[9].

Kako bi se postigao ovakav standard energija se mora generirati unutar kompleksa koristeći obnovljive izvore energije koji ne zagađuju okoliš. Kuće nulte energije zanimljive su i zbog zaštite okoliša jer se zbog obnovljivih izvora energije ispušta vrlo malo stakleničkih plinova.“[10] Kuća nulte energije ima nekoliko vrsta; s nultom potrošnjom unutar kompleksa, s nultom potrošnjom izvorne energije, s nultom energetsom emisijom, s nultom cijenom energije, s nultom potrošnjom energije van kompleksa te s odvojenim sustavom od mreže.

Model kuće za odmor u Smiljanu

Vizija je izgraditi kuću modernijeg dizajna s tradicionalnim krovom te bojama koje se uklapaju u okoliš i nadopunjuju s njime. Prvotni cilj je izgraditi samo jednu kuću s popratnim sadržajima, no uzeti u obzir mogućnost proširenja posla te izgradnju dodatnih objekata. Uredio bi se prilaz kući te igralište za djecu s mekanom podlogom, takozvanim francuskim podom. Uredilo bi se nekoliko parkirališnih mjesta za automobile te poseban prilaz za osobe s invaliditetom ili obitelji s malom djecom i kolicima. Na kuću bi se ugradili solarni kolektori te kvalitetna izolacija. Također, u daljoj budućnosti bi se otvorila mogućnost gradnje bazena čija bi se voda grijala preko solarnih kolektora te bi se tako smanjio trošak vode koja je u velikim količinama potrebna za bazene.

Tablica 4. Kalkulacija kuće za odmor

| Kuća za odmor 50m ² , prizemnica | Cijena EUR | Površina m ² | Potrošnja energije za grijanje u kWh/m ² godišnje | Ukupna godišnja potrošnja energije za grijanje kWh | Električna struja kn godišnje |
|--|------------|-------------------------|--|--|-------------------------------|
| Energetski razred A – Nisko energetske objekti s vrlo dobrom izolacijom, višestruko izolirani zidovi, trostruka PVC stolarija, koriste obnovljive izvore energije, montaža solarnih kolektora | 60,000 | 50 | 118 | 5,900 | 6,070 |
| Energetski razred E, F – kuće s minimalnom izolacijom i povoljnom stolarijom, aluminijskom ili drvenom, ili stanovi u starijim zgradama s lošom stolarijom i na nepovoljnom mjestu u zgradi | 48,000 | 50 | 325 | 16,250 | 17,604 |

Izvor: prijedlog autora (<http://mojracun.hep.hr/kalkulator/index.html>, preuzeto 5.9.2018.)

Prema podacima iz tablice te cijenama građevinskih radova, pokazano je da „standardna“ kuća odnosno, kuća s minimalnom izolacijom i lošijom stolarijom u startu 80% jeftinija, no potrošnja energije za grijanje na godišnjoj razini veća je za 36,31% što u konačnici dovodi do 34,48% većih troškova na godišnjoj razini.

Nastavno, solarni kolektori za navedenu kuću veličine 50m² iznose oko 38,000 kuna te proizvode 4,000 kWh struje što na godišnjoj razini donosi uštedu od oko 3,700 kuna. Sukladno navedenim podacima, investicija se isplati za oko deset godina te donosi veliku promjenu u raspolaganju električnom energijom. Naime, kolektori su odlični za korištenje kada je većim dijelom godine sunčano te se sva skupljena sunčeva energija može koristiti za kućanstvo, no u periodu noći te dana bez sunca, idealna je navedena kombinacija s javnom mrežom.

ZAKLJUČAK

Iako nepovoljna situacija i loša socijalna struktura, Lika je područje koje se polako miče iz dosadašnjih okvira te osluškuje što diktiraju svjetski turistički trendovi. Također, Lika posjeduje čistu i netaknutu prirodu, obilje ljepota te brojnu kulturno-povijesnu baštinu.

Na temelju analiziranih podataka, može se zaključiti kako je Lika hrvatska regija koja je nedovoljno iskorištena, prvenstveno u turističkom smislu, unatoč prirodnim i kulturnim bogatstvima. Razloga je mnogo, no jedno je sigurno - Lika ima potencijal i veliku mogućnost valorizacije, ako se postupi na pravi način s jasnim ciljevima i strategijom. Iako ima neke slabosti i prijetnje, Lika i Gorski kotar predstavljaju destinacije s jako puno potencijala i mogućnosti te kao takve predstavljaju budućnost kontinentalnog turizma u Republici Hrvatskoj, ne samo kao turističke destinacije već i kao mogućnost zapošljavanja te poticanja mladih ljudi na rad u turizmu.

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CRITICAL GAPS IN ENVIRONMENTAL PERFORMANCE OF THE SLOVAK REPUBLIC

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Abstract. *Current paper contributes to better understanding of the gaps in environmental performance of the Slovak Republic as one of the smallest economies of the EU and outlining their impacts on economic development of the country. Outlining gaps in environmental performance of Slovak Republic allows researching their impact in terms of specific indicators of environmental performance on economic development of the country. There have been defined the most problematic aspects of environmental performance of the Slovak Republic, in particular, not sufficient waste water management, low efficiency of the use of energy resources, low rate of decline of the emissions of basic pollutants from growing sectors, low efficiency of waste management, lack of coordination of climate and environmental policies.*

Keywords: *environmental performance, environmental policy*

1. INTRODUCTION

The links between the economy and the environment are twofold: the environment supplies resources to the economy and at the same time it operates as a sink for pollution. Natural resources are significant inputs for production for many sectors, while production and consumption result in pollution. Poor environmental quality in turn affects economic growth and wealth by diminishing the quantity and quality of resources or because of health impacts. In this context, environmental policies can limit the negative feedbacks from the economy on the environment and vice-versa. Current paper contributes to better understanding of the gaps in environmental performance of the Slovak Republic as one of the smallest economies of the EU and outlining their impacts on economic development of the country.

2. THE IMPACT OF ENVIRONMENTAL PERFORMANCE ON ECONOMIC DEVELOPMENT

Although the primary purpose of environmental policy is linked to the necessity of improving environmental indicators in the country, its contribution to the economic development of the country is also important [1]. Many authors have researched the relationship between Environmental Performance Index (EPI) of the countries and their economic development. There has been found positive strong association between economic growth and the values of EPI [2, 3]. It is, thus, important to support eco-related exports, employment in eco-industries, eco-innovations, enhance energy efficiency [4, 5]. Kai Quan Zhang and Hsing Hung Chen [6] have found that environmental performance can cause extra financial burden in the short run, but will improve stakeholder relations and profitability in the long run. When testing Environmental Kuznets Curve hypothesis, Almeida, Cruz, Barata, & García-Sánchez [7] have

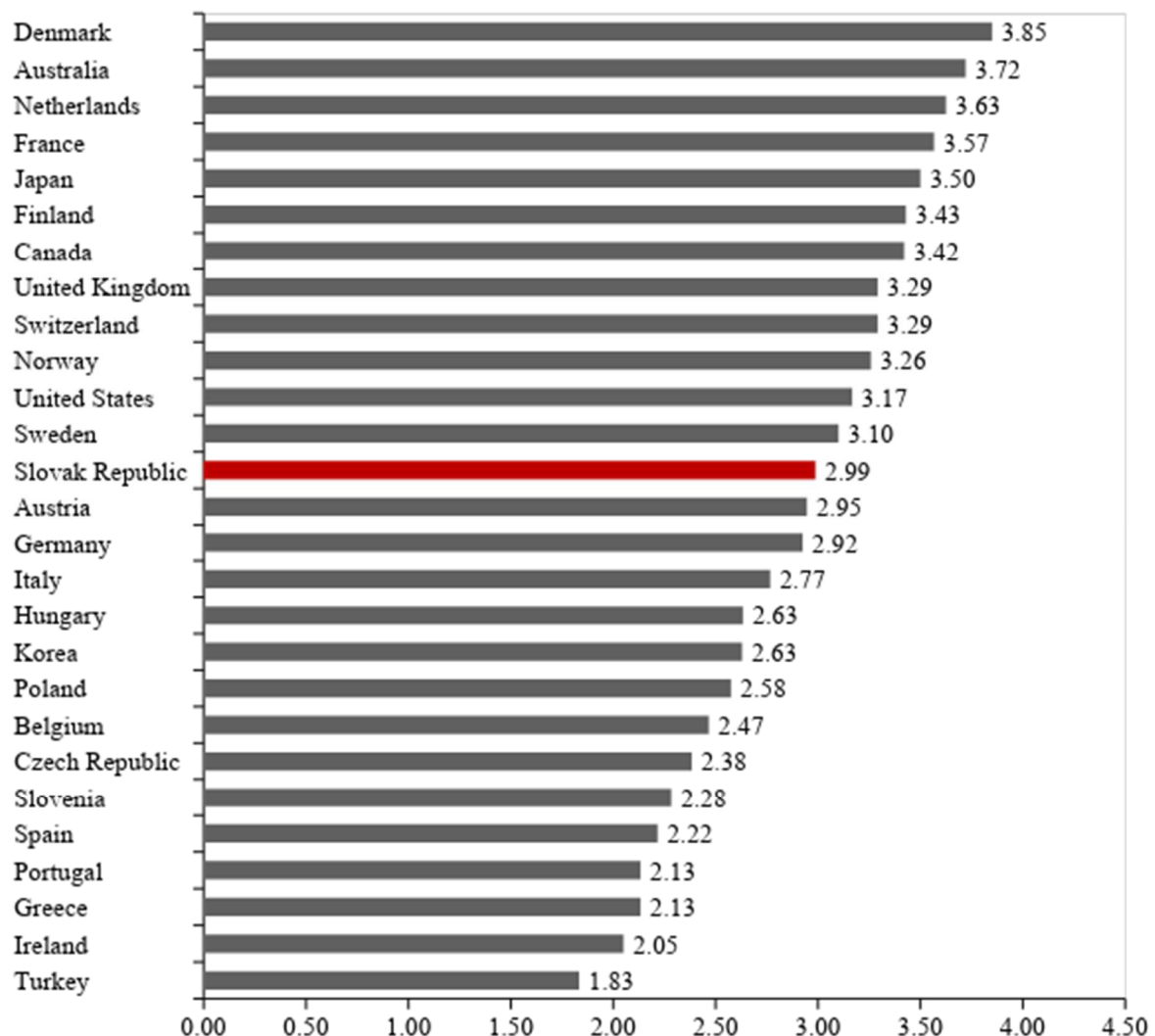
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revealed that the hypothesis is not proved. The authors have concluded that creating a consistent, coherent and efficient environmental policy framework is essential for improving environmental quality that supports wellbeing and enables long-term economic growth. Other impacts of environmental policy have been researched by Chen, Shieh, & Chang [8]. The authors have conducted comparative analysis in terms of the effectiveness of the emission tax and public abatement. Their findings have shown that these two specific environmental policies result in different levels of economic performance when households can internalize the change in health status by optimally allocating the time spent on leisure, labor and health care.

3. ENVIRONMENTAL PERFORMANCE GAPS IN SLOVAKIA

According to the last available data for all OECD countries for the indicator of stringency of environmental regulation, Slovakia is ranked as a country with middle environmental regulation (figure 1).

Figure 1: Environmental Policy Stringency Index in OECD countries, 2012.

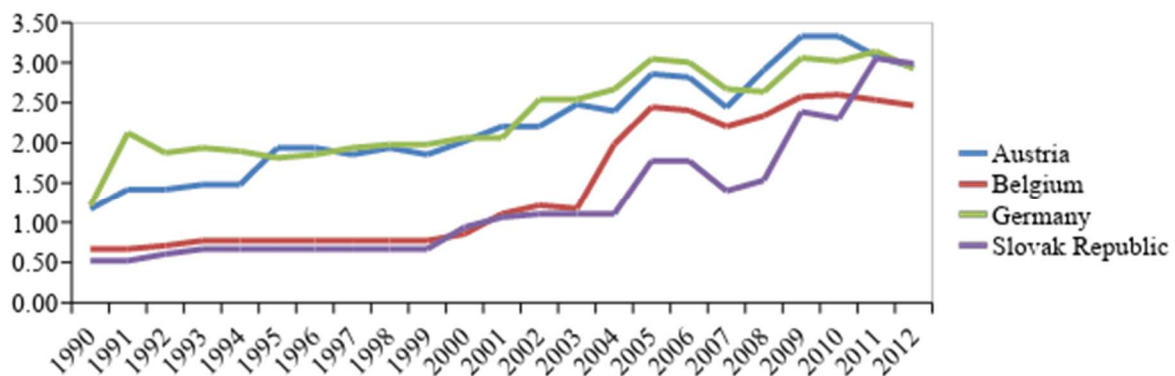


Source: constructed by author on the base of OECD, 2018 [9]

Slovakia according to OECD Environmental Policy Stringency Index leaves behind Germany, Austria and Belgium which are perceived as highly regulated countries [10]. Slovakia has

significantly increased the stringency of environmental policy comparing to the countries with high environmental standards (figure 2). There have been developed effective policy measures towards the development of circular and eco-innovative economy in Slovakia. In particular, in the field of R&D funding there has been developed Research and Innovation Strategy for Smart Specialization of the Slovak Republic (RIS3) and R&D funds from the Operational Programmes of Structural funds as well. There are also Tailored training courses for companies and entrepreneurs, in particular, BUILD Up Skills initiative has one SK ongoing project (STAVEDU) and one Horizon 2020 construction skills project (iNgRes), Advise/consulting for start-ups, companies and entrepreneurs, in particular, Slovak Innovation and Energy Agency provides support/consulting; competence centres, clusters, science-technology parks. There have been developed regulations, targets, cap and trade schemes, in particular, performance standards, labelling, certification, “green“ public procurement of goods and services, demand subsidies (e.g. eco-vouchers, consumer subsidies), awareness raising and information provision [11]. It should be noted that the last is crucial for the development of innovative cooperation in Slovakia [12]. But there is still a row of challenges which should be addressed.

Figure 2: Evolution of Environmental Policy Stringency Index in selected countries



Source: constructed by author on the base of OECD, 2018 [9]

Previous studies have shown that in many cases there is relationship between indicators of environmental performance or environmental policy on economic development of the countries. Outlining gaps in environmental performance of Slovak Republic allows researching their impact in terms of specific indicators of environmental performance on economic development of the country.

We have distinguished the following weaknesses of environmental performance of Slovak Republic:

- The wastewater management is still one of the main challenges in environmental performance of the Slovak Republic. Investments in public sewers and water supply systems caused a growth in the share of the population related to public water supply system from 85% in 2007 to 88.6% in 2016, and to a growth in the share of the population related to investments in public sewers from 54% to 66.4% during the same period, but this figure remains below the average in international comparison. For economic growth effective wastewater management plays important role. According to the World Bank infrastructure for sanitation can return investment fivefold, whereas poor sanitation can draw off up to 7% of GDP each year [13]. Wastewater management is an important process for mitigating the hazards of industrial, agricultural, municipal

by-products as well. Thus, resource potential of wastewater management should be recognized for sustainable economic development;

- Low efficiency of the use of energy resources. Slovakia represents one of the most energy intensive economies in the European Union. In 2015, the country's energy intensity was 80% higher than the member states average. In the power sector, most of the electricity production from coal power plants was replaced by nuclear power generation, thereby diminishing emissions and energy intensity. But the rest of the economy, however, is considerably energy- and emissions-intensive. At the same time energy tax in Slovakia is the second lowest in the EU and less than half if compared to the average value in Europe. Increasing of environmental taxes will contribute to enhancing the efficiency of the use of energy sources. It should be noted that energy is a significant element of production, thus, it is interrelated with the other elements of the economic system as well as environmental and social aspects [14];
- Low rate of decline of the emissions of basic pollutants from growing sectors, in particular, from residential heating and transport. In 2015 compared to 2014 there was a decline in the emissions of NOX and CO but there was a growth in the emissions of PM2,5 and PM10 and considerable growth of SO2 emissions. It should be noted that air pollution is one of the most serious environmental risks, in particular, for big cities and highly populated territories where it causes strong negative impacts on human health, that, in turn, increases health expenditures and lowers labor productivity due to absence from work for illness [15];
- Low efficiency of waste management. In Slovak Republic the fee for the storage of municipal waste at the landfill is one of the lowest in the EU. At the same time Slovakia demonstrates a low recycling rate (23% in 2016) and high level of landfill (66% in 2016). For economic growth waste management plays important role, as it contributes to more efficient energy use, in particular, through energy generation from landfill via methane extraction or thermal treatment and separation of recyclable materials from the landfills [16];
- Lack of coordination of climate and environmental policies. In terms of climate vulnerability, Slovakia could be compared to South-Eastern Europe, but the country is more exposed to climate impacts than its Central European neighbor states. Slovakia is progressively noticing the impacts of a changing climate through a rising number of droughts and floods. The south of the country is suffering from a gradual desertification, and accessible water sources are falling. Fresh water runoff is projected to decline by 29% by 2030 in the lowlands and by 35% in south of the country. It also should be noted that according to polls, 47% of Slovaks are worried about shortages of drinking water, compared to an EU average of 27% [17]. To respond to the climate challenge, Slovakia adopted National Adaptation Strategy in 2014, which introduced policies in the areas of biodiversity, agriculture, forestry, water and health. But there are often opposite views on climate concerns. There were made efforts for enhancing co-ordinate but they did not really work in practice [18]. Effective coordination of climate policy is on the agenda of Horizon 2020 and sustainable development goals. Climate policy remains one of the most important spheres of the focus as energy use, agriculture, human health and the nature are affected by the weather. Furthermore, climate change is long-term problem as greenhouse gases have very long atmospheric life-time, of thousands of years, and a small amount of carbon dioxide will remain in the atmosphere practically forever.

4. CONCLUSIONS

Considered above mentioned weaknesses of environmental performance of the Slovak Republic point to the need to conduct a comprehensive assessment of the current gap in sanitation infrastructure and water supply, measures required to meet waste management objectives, their cost as well. Realistic strategy for meeting the EU objectives for the water management, in particular, for wastewater treatment, including comprehensible priorities, proper financial planning is needed. Further institutional reform of the water management sector will help to coordinate measures to increase connections between water and wastewater network. There is also need in the development of infrastructure for increasing the number of the inhabitants which could be served. It should be noted that for achieving wastewater efficiency a targeted information campaign should be implemented, for instance, in form of environmental education. Motivation for waste minimization, diversion and recovery is possible through the development of effective economic instruments. Review of the effectiveness and efficiency of environmental taxes for achieving their environmental goals is also needed, as well as their consistency to other economic instruments. For reducing emissions from growing sectors, in particular, from residential heating and transport and for reducing potential health impacts in urban areas cost-effective measures should be developed. Finally, consolidation of the inter-institutional partnership platform and expanding its activities to the strategic model of the development of climate policy and evaluating climate change, consistent to energy and transport policies, enhancing the system of monitoring greenhouse gas emissions in relation to financial and economic costs considerably contribute to shrinking gaps in environmental performance of the Slovak Republic.

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A CHALLENGE TO INTRODUCTION OF RENEWABLE ENERGY IN SERBIA

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Abstract: *A shift to renewable energy sources has gained momentum in the past decade. With an aim to jump on the bandwagon, and with a more important goal of fulfilling the obligations to European Union, accepted by various documents in the direction of joining the EU, Serbia has adopted a National Renewable Energy Action Plan (NREAP) in 2013, with a goal to reach target of 27% for a renewable portion of Gross Final Energy Consumption, as set per documents of European Union. Starting from 20.9% in 2012, the results from the last published compiled report of 2016, however, show no progress at all in the four years covered by the report. The insight in the existing projects, and a projection of future energy needs, show no proof that the situation is going to improve in the near future. Probably with all this in mind, and with a clear understanding of predicted energy needs, an expansion of Kostolac power plant has been initiated, regardless of European plans to gradually phase out this type of electricity generation facilities. Apart from the fact that this power plant is going to provide a short-term solution to an urgent problem, it is self-evident to the authors that significant changes to the approach to renewable energy adoption have to be made. In this paper some suggestions are given that might mitigate the problem and take us closer to the target that we accepted as ours.*

Keywords: *Renewable energy, Energy efficiency, European renewable energy targets, NREAP*

1. INTRODUCTION

A shift to renewable energy sources has gained momentum in the past decade. Although renewable sources of energy, like hydropower and solid biomass, (mostly in the form of logwood) might represent a significant portion of energy balance, depending from country to country, new ways of renewable energy exploitation are becoming more and more affordable and applicable every day. In addition to this, renewable sources of energy are, in most cases, more environmentally friendly, and represent less danger to the nature. On the top of it all, renewable sources of energy are mostly locally generated, and therefore helpful in the energy independence sense. All this makes renewable sources of energy optimum solution for the future.

For this reason, all around the world, governments have hatched plans to increase portion of renewable energy in their energy balance. European Union is no exception, and Serbia follows this policy as the part of its stabilization and association agreement plan. For this reason, in 2013 government has accepted National Renewable Energy Action Plan (NREAP) [3], with an objective to reach 27% as a portion of renewables in Gross Final Energy Consumption (GFEC)

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by the year 2020, as per European directives. Plan did not appear unrealistic, as for the year 2012, this portion was already 20.9% by Eurostat data [4]. There is, however, certain discrepancy between the data registered in Eurostat, and data in NREAP. There is an explanation to this, which we do not find of significance for this research. In this paper, we will refer to data as listed by Eurostat reports.

2. CHALLENGE

So, where is a challenge? To understand it, we have to see where we are now, at the threshold of 2019, compared to 2012. As per Eurostat data, renewable energy portion of the GFEC in 2016 (last year with compiled data) is 20.9%. As per official data of European Union, Serbia has not achieved anything in this field, in the four years that are compiled, at least. Reports for 2017 are not compiled yet, and 2018 is still to be collected, but we did not find any data to support the theory that something changed significantly since 2016.

Progress report on NREAP, compiled in 2016 [5], admits this fact, (only for the period 2014 and 2015), and gives some explanations for the reasons why it is so. It does not, however, give a proposal on additional measures to be taken, and technically speaking, as a report, it is not necessarily intended to do so. But, in that case one would expect some update to NREAP, which authors failed to find, with a reasonable assumption that it does not exist, at least not as an official document.

At this point, we find it illustrative to analyze situation in other European countries, using the Eurostat data. Most of the countries in this report showed a significant progress - For example, countries with lowest RE penetration, like United Kingdom and Netherlands, managed to increase its RE portion from 4.6% to 9.3%, and from 4.7% to 6%, respectively. Countries with traditionally high RE penetration, like Norway and Sweden also increased their achievements from 64% to 69.4%, and from 51.1% to 53.8 % respectively.

Table 1. Percentage of Renewable Energies in Gross Final Energy Consumption for some EU countries

| | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | Target |
|-------------|------|------|------|------|------|------|------|------|------|------|------|------|------|--------|
| Lithuania | 17.2 | 16.8 | 16.9 | 16.5 | 17.8 | 19.8 | 19.6 | 19.9 | 21.4 | 22.7 | 23.6 | 25.8 | 25.6 | 23 |
| Luxembourg | 0.9 | 1.4 | 1.5 | 2.7 | 2.8 | 2.9 | 2.9 | 2.9 | 3.1 | 3.5 | 4.5 | 5.0 | 5.4 | 11 |
| Hungary | 4.4 | 6.9 | 7.4 | 8.6 | 8.6 | 11.7 | 12.7 | 14.0 | 15.5 | 16.2 | 14.6 | 14.4 | 14.2 | 13 |
| Malta | 0.1 | 0.1 | 0.1 | 0.2 | 0.2 | 0.2 | 1.0 | 1.9 | 2.8 | 3.7 | 4.7 | 5.0 | 6.0 | 10 |
| Netherlands | 2.0 | 2.5 | 2.8 | 3.3 | 3.6 | 4.3 | 3.9 | 4.5 | 4.7 | 4.8 | 5.5 | 5.8 | 6.0 | 14 |
| Austria | 22.5 | 23.7 | 25.4 | 27.0 | 27.8 | 30.0 | 30.2 | 30.6 | 31.5 | 32.4 | 33.0 | 32.8 | 33.5 | 34 |
| Poland | 6.9 | 6.9 | 6.9 | 6.9 | 7.7 | 8.7 | 9.3 | 10.3 | 10.9 | 11.4 | 11.5 | 11.7 | 11.3 | 15 |
| Portugal | 19.2 | 19.5 | 20.8 | 21.9 | 23 | 24.4 | 24.2 | 24.6 | 24.6 | 25.7 | 27.0 | 28.0 | 28.5 | 31 |
| Romania | 16.3 | 17.3 | 17.1 | 18.3 | 20.5 | 22.7 | 23.4 | 21.4 | 22.8 | 23.9 | 24.8 | 24.8 | 25.0 | 24 |
| Slovenia | 16.1 | 16.0 | 15.6 | 15.6 | 15.0 | 20.1 | 20.4 | 20.3 | 20.8 | 22.4 | 21.5 | 21.9 | 21.3 | 25 |
| Slovakia | 6.4 | 6.4 | 6.6 | 7.8 | 7.7 | 9.4 | 9.1 | 10.3 | 10.4 | 10.1 | 11.7 | 12.9 | 12.0 | 14 |
| Finland | 29.2 | 28.8 | 30.0 | 29.6 | 31.3 | 31.3 | 32.4 | 32.8 | 34.4 | 36.7 | 38.7 | 39.2 | 38.7 | 38 |
| Sweden | 38.7 | 40.6 | 42.7 | 44.2 | 45.3 | 48.2 | 47.2 | 48.8 | 51.1 | 52.0 | 52.5 | 53.8 | 53.8 | 49 |
| UK | 1.1 | 1.3 | 1.5 | 1.8 | 2.7 | 3.3 | 3.7 | 4.2 | 4.6 | 5.7 | 7.0 | 8.5 | 9.3 | 15 |
| Iceland | 58.9 | 60.1 | 60.8 | 71.4 | 67.4 | 69.6 | 70.3 | 71.5 | 72.4 | 71.6 | 70.4 | 70.2 | 72.6 | - |
| Norway | 58.1 | 59.8 | 60.2 | 60.1 | 61.7 | 64.8 | 61.1 | 63.7 | 64.0 | 65.9 | 68.6 | 68.4 | 69.4 | - |

On the other hand, there are countries that did not achieve any progress in the period observed-

Iceland, Montenegro, Former Yugoslav Republic of Macedonia, and – Serbia. Iceland, with over 70% penetration of RE is another league, however.

Table 2. Percentage of Renewable Energies in Gross Final Energy Consumption for some NON-EU countries

| | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | TARGET |
|-------------|------|------|------|------|------|------|------|------|------|------|------|------|------|--------|
| Switzerland | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Montenegro | - | 35.7 | 34.8 | 32.9 | 32.3 | 39.4 | 40.6 | 40.6 | 41.5 | 43.7 | 44.1 | 43.1 | 41.5 | - |
| FYROM | 15.7 | 16.5 | 16.5 | 15.0 | 15.6 | 17.2 | 16.5 | 16.4 | 18.1 | 18.5 | 19.6 | 19.5 | 18.2 | - |
| Albania | 27.8 | 30.3 | 32.1 | 32.7 | 32.4 | 31.4 | 31.9 | 31.2 | 35.2 | 33.2 | 31.5 | 34.4 | 37.1 | - |
| Serbia | 12.9 | 14.4 | 14.6 | 14.4 | 16.0 | 21.2 | 19.9 | 19.2 | 20.9 | 21.4 | 22.7 | 21.8 | 20.9 | - |

In the same Eurostat table, one can see the target that was set by authorities for most of the countries in this table. It is possible to observe that some of the targets were little too optimistic, but to the authors, progress achieved seems to be a more important than actual result itself. There is no target for Serbia in this table, but from NREAP we know that it was set to 27%

In the same time, Serbia has undertaken a serious project of enlarging a Kostolac coal fired power plant. Extension is essentially a whole new power plant. It is understandable from governmental point of view - an economy which is going to need electricity in the future needs an urgent solution. Renewables do not seem to be up to the pace, and lignite deposits are domestic source of energy. In addition, extensive experience in coal fired power plants that exists in Serbia offers a quick solution, so much needed in a situation that threatens to become urgent. The only problem is that, up to our knowledge, it is the only new coal fired power plant in construction in Europe, and for a good reason. Without going into details, European Union decided to phase out coal fired power plants, and not to build new ones, regardless of coal deposits that exist in some European countries. That decision is a part of EU documents. So, what conclusion can we draw from a decision to support a new one in Serbia?

With all this in mind, it is self-evident that Serbia needs a new approach to the problem of renewable energy. What we suggest is an approach in different levels, both for the national strategy decision makers, and for the individual consumers.

Serbia, with an assistance of UNDP, has a compiled a number of documents designated as “investor guide”, for different renewable energies: Thermo solar [6], Photovoltaic [7], Wind [8], Biomass [9], Mini Hydraulic [10], and Geothermal [11]. These documents are supposed to be information for possible investors in the field of renewable energies. The thing that we cannot see in this document are the obstacles that are obviously falling on the path of the investors on their road to completion. For example, Wind Park Nikine Vode has signed its first documents to be made public in February 2012. In December 2018, after nearly seven years, investment seems to be nowhere near to completion, with paperwork still being on the table. Regardless of the reason for such a slow pace, there is no project in renewable field that would withstand such a long investment period. (There are few projects in any field, for that matter, that could survive this).

In the individual household consumption, authorities have failed to provide simple legislative frame that would enable households to make use of “on-grid” solutions for their electricity production. At this point, the only way for households to make use of surplus energy produced

on their roof, just to take one example, is to start a LLC company, and register it with state electric distribution company as an electric energy producer. Having this as a solution, and with company maintenance costs involved, it is clear that individual households have no financial benefit from this approach. A situation where surplus energy is given away is, on the other side, legally questionable in actual legal framework. As the feed-in quota for photovoltaic is long gone, and being ridiculously small in the first place, barriers to photovoltaic energy producers seems to be impossible to overcome.

Situation is not much different with other renewable energies, regardless of the investor guides published. Biomass plants can hardly benefit from agricultural waste, while setting fire on that waste on the fields is a common, although illegal practice in Serbia.

Recently, mini hydraulic power plants received attention of the public, and, unfortunately, not in a desirable way. The current cadaster of water sources applicable for mini hydraulic power plants has been compiled in 1987. If we put aside reliability of the data back then (and there are possible doubts in this sense), there is a strong possibility that water flow of today is not the same as it was back then, to mention only the most obvious problem. A new cadaster is to be compiled by the beginning of 2019, but the facilities are already being constructed, and we do not know at this point if the timeframe for a new cadaster is going to be respected. Using a comparative analysis there are good chances that we are going to wait for it while longer. Meanwhile, we witnessed public outcry on the local level, with claims that mini hydraulic plants are making devastating impact to the nature. Even ministry in charge of environment supported this opinion. So, we have the situation that, instead being an improvement in environmental sense, renewable energy is devastating the nature. This being the only widely publicized renewable source of electricity, the negative PR in relation to renewable energy is certainly not taking us in desired direction.

For all renewable facilities that are producing energy there is common problem of connection to the grid. This problem is less pronounced for small facilities that are connected to local distribution grid. If a connection has to be performed via EMS owned lines (EMS - Elektromreža Srbije - the company in charge of distribution facilities of 110 kV and up), situation becomes significantly more complicated, and seemingly not only to the simple fact of higher voltage level. Nonexistent or barely existent guidelines and timeframes in both cases present an obvious problem, with seemingly complete lack of understanding of importance and/or concept of renewable energy as a whole within public enterprises in charge.

If we talk about renewable energy for general population, that represent roughly about 1/3 of Gross Final Energy Consumption, one would expect solutions for thermo solar, photovoltaic, biomass, heath pumps and small wind turbines. These clients ask for those solutions on the open market, so it would be interesting to see what offer is there on the market.

In that sense, authors have asked for a quotation from the companies that advertise on the internet, believing that this would be a logical choice for an average customer. We have sent a request for a quotation to first five companies that appear on google. The request was for a 400 square meter house located in Stara Pazova, and asking for a suggestion to their choice, from five different fields of renewables: thermo solar, photovoltaic, biomass, heath pumps and small wind turbines. The request contained results from energy efficiency analysis, performed to legal requirements. Additionally, we requested the suppliers to specify estimated energy production by month for system they would offer. We checked by telephone to be sure that companies received our request.

The result was disappointing: from five companies, we received only two quotations and one promise over the phone, which never came in a form of actual quotation. None of them attempted to estimate energy production for the systems they were offering.

One reason for this might be a low level of knowledge on the side of possible equipment suppliers. The other might be a low demand. In general, there is a common knowledge in Serbia that electricity is cheap, and that until it is so, no renewable technologies can compete with low prices from the grid. There are few things that are further away from the truth than this claim.

Table 3. Prices of electric energy for household for different consumptions and tariffs in Serbia

| Energy consumed kWh | Tri phase Single tariff | Installed power 11.04 kWh | Total billed RSD | Actual total price per kWh | Energy consumed kWh | Tri phase Two tariff 2:1 | Installed power 11.04 kWh | Total billed RSD | Actual total price per kWh |
|---------------------|-------------------------|---------------------------|------------------|----------------------------|---------------------|--------------------------|---------------------------|------------------|----------------------------|
| 1 | | | 760,27 | 760,27 | | | | | |
| 2 | | | 767,12 | 380,56 | 3 | | | 771,08 | 257,02 |
| 5 | | | 787,68 | 262,56 | 5 | | | 780,95 | 156,19 |
| 10 | | | 821,93 | 82,19 | 10 | | | 814,22 | 81,42 |
| 20 | | | 890,42 | 44,52 | 20 | | | 869,28 | 43,46 |
| 50 | | | 1.095,92 | 21,92 | 50 | | | 1.045,93 | 20,92 |
| 100 | | | 1.438,42 | 14,38 | 100 | | | 1.344,18 | 13,44 |
| 200 | | | 2.123,40 | 10,62 | 200 | | | 1.919,19 | 9,60 |
| 300 | | | 2.808,40 | 9,36 | 300 | | | 2.519,95 | 8,40 |
| 350 | | | 3.150,89 | 9,00 | 350 | | | 2.818,22 | 8,05 |
| 400 | | | 3.920,95 | 9,80 | 400 | | | 3.513,25 | 8,78 |
| 500 | | | 4.942,50 | 9,88 | 500 | | | 4.387,61 | 8,77 |
| 750 | | | 7.496,39 | 9,99 | 750 | | | 6.583,61 | 8,77 |
| 1000 | | | 10.050,26 | 10,05 | 1000 | | | 8.779,60 | 8,77 |
| 1250 | | | 12.604,14 | 10,08 | 1250 | | | 10.966,93 | 8,77 |
| 1500 | | | 15.158,02 | 10,10 | 1500 | | | 13.162,93 | 8,77 |
| 1600 | | | 16.179,56 | 10,11 | 1600 | | | 14.043,06 | 8,77 |
| 1700 | | | 18.210,54 | 10,71 | 1700 | | | 15.782,75 | 9,28 |
| 2000 | | | 24.303,47 | 12,15 | 2000 | | | 21.010,48 | 10,50 |
| 2500 | | | 34.458,35 | 13,78 | 2500 | | | 29.726,23 | 11,89 |
| 3000 | | | 44.613,23 | 14,87 | 3000 | | | 38.424,67 | 12,80 |
| 4000 | | | 64.922,99 | 16,23 | 4000 | | | 55.856,20 | 13,96 |
| 10000 | | | 186.781,55 | 18,68 | 10000 | | | 160.410,70 | 16,04 |

If we look in table number 3, we can see the actual prices that are paid by electricity customers on household level per kWh. One can notice that electricity price in Serbia is set in three different tiers, “green tier” up to 350 kWh per 30 days, “blue tier” from 350 to 1600 kWh per 30 days, and “red tier” over the 1600 kWh per 30 days. There are different options, one being a “flat” daily rate, on the left of the table, and the other being low and high tariff counter during the day. To the right we see this situation, if we presume one to two ratios for low/high tariff

during the day. We can see that the cheapest electricity price is if one uses up to 350 kWh per 30 day, and it costs 6.82 euro cents per kWh. This is already a price that could support photovoltaic installation on house roof. But, more importantly, if a household uses such installation to shave off its peak consumption, higher estimates could be used, like 11.8 euro cents for kWh, for consumptions up to 4000 kWh per month.

This paper would not be complete if we do not mention energy efficiency. Current Action Plan for Energy Efficiency is number 3, compiled in 2016 [12], and seemingly has no operational connection with NREAP. There is no mention of renewable energy in this Action Plan, and in the other direction, Energy Efficiency is mentioned in NREAP, but when we read NREAP, one can realize that this is only because EU guidelines insist on this. This leads to conclusion that there is no common understanding of importance for joint action in those two fields. As for energy efficiency for households, all the knowledge in this area seems to come from press or the Internet. Thermal insulation for housing is installed by “general practice” construction workers, with no formal education in the field. And this accounts for a waste area of private or collective housing.

On the other side, households could highly benefit from energy efficiency, only if this information would be conveyed to them in an appealing form. To understand it better, here is the energy calculation for a house without insulation, and a calculation for the same house with a well installed insulation. A difference between 43922 kWh and 9644 kWh for heating only could easily convince any client when converted into price of energy, and price of insulation installing. No measures for sanitary hot water heat recuperation were considered, as it is still regarded as exotic (not only in Serbia), but this could also make an easy to defend investment.

Table 4. Energy consumption for non-insulated household of 400 square meters in Stara Pazova

| | |
|---|-------------------------|
| Annual heating demand | 43.922,16 kWh |
| Annual losses in the heating system | 27.846,07 kWh |
| Annual demand for sanitary hot water | 3.340,80 kWh |
| Annual losses in sanitary hot water system | 0,00 kWh |
| Annual cooling demand | 0,00 kWh |
| Annual losses in the cooling system | 0,00 kWh |
| Annual energy demand for ventilation and air conditioning | 0,00 kWh |
| Annual energy demand for light | 20,00 kWh |
| Total Annual energy delivered | 290.312,82 kWh |
| Specific Annual energy delivered | 2.119,07 kWh/mkv |
| Allowed primary energy consumption | 0,00 kWh |
| Annual Carbon Dioxide emissions | 150.056,88 kg |

Table 5. Energy consumption for well insulated household of 400 square meters in Stara Pazova

| | |
|---|-----------------------|
| Annual heating demand | 9.644,08 kWh |
| Annual losses in the heating system | 4.023,84 kWh |
| Annual demand for sanitary hot water | 3.340,80 kWh |
| Annual losses in sanitary hot water system | 0,00 kWh |
| Annual cooling demand | 0,00 kWh |
| Annual losses in the cooling system | 0,00 kWh |
| Annual energy demand for ventilation and air conditioning | 0,00 kWh |
| Annual energy demand for light | 20,00 kWh |
| Total Annual energy delivered | 97.198,83 kWh |
| Specific Annual energy delivered | 709,48 kWh/mkv |
| Allowed primary energy consumption | 0,00 kWh |
| Annual Carbon Dioxide emissions | 50.240,13 kg |

And, at the end, we have to mention education for both energy efficiency and renewables. As for energy efficiency, the only comprehensive education is performed by chamber of engineers, in order to certify engineers for energy certifications of buildings. Apart from this, insulation material suppliers have some courses focused to promotion of their products, but in some cases, it proves useful - URSA is providing engineers with practical software tools for building energy certification (tools that are provided by relevant officials in other EU countries, by the way). As for renewable energy, this area is even less covered.

CONCLUSION

To summarize the situation, portion of renewable energy in GFEC currently seems to be going nowhere in Serbia. Renewable energies on a larger scale have most prominently being deployed in the field that has been conceived in 19th century- derivative mini hydraulic. It is like that from all the renewable technologies on the market, we decided to focus on one that has most significant environmental impact. Other, more modern technologies are being constructed, but all of them have a problem of connection to the grid, in some cases nearly a decade long problem, that cannot be explained by any acceptable logic.

On the household level, everything is left to press, Internet and equipment suppliers. No wonder that renewable energy is still considered exotic and complicated by individual homeowners. As for energy efficiency, it is gaining its position in the building society, but at this pace, it is not going to reach satisfactory levels any time soon. In addition, it is completely detached from renewable energy, and we know that success in this field is only achieved if appropriate energy efficiency measures are taken. We could easily claim that our most perspective source of renewable energy is energy efficiency.

On the level of education, things seem to be as low as it can get. The only comprehensive education is there because of building code requirements, and as a support to equipment suppliers.

So, what could be done in order to improve the situation? Authors would like to suggest certain measures that could easily push the situation forward:

Changes in legislative are needed. Some are already improving the situation- recently adopted changes in legislation prevent individual owners from blocking construction works for linear infrastructure. It is yet to be seen what would be the effects of this. In addition to this, as a very significant measure, legislators should provide “off the shelf” legislative and technical solutions for connection to the grid. This should prevent relevant authorities from arbitrary procedures that are costly and time consuming.

Education would be a second field. Relevant educational programs should be compiled, addressing separately authorities, experts, equipment suppliers and consumers. Some of them could be done with the help of NGO, others need more detailed approach, that is suitable for universities and institutes.

An appealing offer for individual households should be put on the market. This offer has to indicate clear cost benefit to the client, and should overcome exotic and complicated impression that consumers have toward renewable sources of energy. This measure, if made correctly, would make very fast impact to the overall performance. Energy efficiency and heat recovery units, solar and photovoltaic collectors, heat pumps and highly efficient biomass burning

equipment are already available, the households only have to understand the cost/benefit and to start to use it more intensively to its own progress.

At the end, we would like to stress the fact that now is the right time to join this technology wave. It is mature enough to support itself, and still simple enough to be easy for catching up. Pretty much like computer technologies back in the sixties, when Serbian industry was comparable with best achievers in the world. We find renewable energies to be one such chance of today.

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UTICAJ SPORTA I ZABAVNE INDUSTRIJE NA DRUŠTVENU ODGOVORNOST I OPŠTE DOBRO

THE IMPACT OF SPORTS AND ENTERTAINMENT INDUSTRY ON SOCIAL RESPONSIBILITY AND SOCIAL GOOD

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Sadržaj: *U današnjem užurbanom svetu ljudi polako postaju svesni činjenice kakvo značenje imaju pojmovi društvena odgovornost i opšte dobro. Veoma je važno istaći da većina ovih ljudi počinje da shvata kako to utiče na njihove živote i njihovu budućnost, kao i na budućnost naše planete. Ovo je glavni razlog zašto smo odlučili da napišemo rad na temu „Uticaj sporta i zabavne industrije na društvenu odgovornost i opšte dobro“. Članak smo napisali sa namerom da doprinesemo razvoju ove teme na našim prostorima. Naš rad će biti usmeren na analizu sadašnjeg stanja i izazova sa kojima se susreće ova oblast, kao i potrebe odnosno mogućnosti za podizanje iste na viši nivo. Kao glavni cilj u ovom radu želimo prikazati ulogu uticaja sporta i zabavne industrije na društvenu odgovornost i opšte dobro. Nadamo se da će, nakon sumiranja zaključaka i preporuka, ovaj rad biti podsticaj u daljem razvoju ove teme.*

Ključne reči: *Društvena odgovornost, opšte dobro, sport, zabavna industrija.*

Abstract: *In today's busy world, people slowly become aware of terms such as social responsibility and social good. It is very important to point out that most of these people begin to understand how it affects their lives and their future - as well as the future of our entire planet. This is the main reason why we have decided to write a paper about the impact of sports and entertainment industry on social responsibility and social good. We have written an article with the intention to contribute to the development of this topic in our region. Our work will be focused on analyzing the current situation, the challenges that this area encounters, as well as the needs and possibilities for raising it to a higher level. As a main objective in this paper, we want to show the role of the influence of sports and the entertainment industry on social responsibility and social good. We hope that, after summing up conclusions and recommendations, this paper will be an incentive for the further development of this topic.*

Keywords: *Social responsibility, social good, sport, entertainment industry.*

1. UVOD

Industrija sporta i industrija zabave su dve oblasti koje imaju ogroman uticaj na našu planetu – kako na biznis sektor, tako i na ljudske živote. Razlog za to je zato što ljudi traže u njima svoje idole, inspiraciju, i heroje za svoj svakodnevni život. Jedan od najboljih primera za ovu temu su deca. Primera radi, pogledajmo decu u dvorištu škole koja igraju fudbal – ako ih

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malo pažljivije posmatramo i slušamo, videćemo da tamo ima uvek neki Messi, Ronaldo, Buffon itd. Svako od njih bira svog junaka i pokušava da kopira njegov stil igre na terenu pred svojim vršnjacima. Ta deca žele da postanu kao svoji idoli i daju sve od sebe da bi to ostvarili, psihički i fizički.

Ipak, ne treba zaboraviti na vrlo važan aspekt sa kojim se sreću roditelji svakodnevno u tim situacijama. Svako dete ima želju da se poistoveti sa svojim idolom, želi da ima dres, kopačke, šorc, kapu ili bilo šta slično sa imenom ili inicijalima svog junaka.

Odličan primer za ovo jeste autorsko pismo Nade Jeftić iz okoline Subotice, koje je poslala PR i marketing službi fudbalskog kluba Partizan iz Beograda [1]. Nada u svom obraćanju navodi da je ona osoba sa invaliditetom i da je veliki navijač Partizana ali da nije u mogućnosti da posećuje utakmice svog voljenog kluba u Beogradu. Trenutno ima mogućnost da prisustvuje utakmicama jedino kada Partizan igra u Subotici. Njena najveća želja, pored dobrog zdravlja jeste da upiše studije novinarstva i da radi za svoj voljeni klub.

Visoka škola za komunikacije na Novom Beogradu, omogućila je Nadi da dobije besplatno školovanje na trogodišnjim studijama novinarstva a predavanja će biti održana na daljinu pa Nada neće biti prinuđena da svakodnevno dolazi na predavanja. Kao bonus, PR i marketing služba, omogućila je da njen prvi intervju bude sa jednim od njenih omiljenih igrača.

Većina vrhunskih sportista je svojim odricanjem i mukotrpnim radom posvetila svoj život konkretnom profesionalnom cilju i uspehu. Upravo zbog takve posvećenosti su fudbalske zvezde zaslužile veliko poštovanje od ogromnog broja njihovih fanova širom sveta. Mladim ljudima uspešni sportisti služe kao inspiracija i oni veoma često svojim ponašanjem kopiraju ponašanje svoje zvezde.

Uloga sporta i sportista jeste da se izbrišu granice među ljudima kao što su veroispovest, rasa i nacionalnost. Imamo dva primera iz skorije prakse kada su sportisti sa naših prostora pokazali svima na svetu kako su normalni odnosi između Srbije i Hrvatske prioritet u svakom smislu. Novak Đoković je jedan od najvećih sportista sa naših prostora, kao prvi javno čestitao Hrvatskim fudbalerima na osvajanju drugog mesta na svetskom prvenstvu u fudbalu ove godine u Rusiji. Ovakav njegov gest je izazvao pozitivne reakcije u medijima širom regiona i u svetu, što samo potvrđuje da sportisti mogu u pozitivnom smislu da utiču na široke narodne mase.

Drugi primer su juniorske košarkaške reprezentativke Srbije, koje su na evropskom prvenstvu u Mađarskoj osvojile srebrnu medalju. Svoj uspeh su proslavljale tako što su zajedno zagrljene sa Hrvatskim košarkašicama slavile i pevale. Ovo je bila veoma snažna poruka svima nama u regionu da sportisti mogu uticati u pozitivnom smeru na ljude, bez obzira da li se radi o juniorima ili seniorima.

2. CILJ ISTRAŽIVANJA

Glavna svrha ovog istraživanja jeste objašnjenje pojmova i podizanje svesti kod ljudi o značaju koncepta društvene odgovornosti i opšteg dobra. Članak je napisan sa namerom da doprinesemo razvoju ove teme na našim prostorima. Ovo možemo postići tako što ćemo objasniti pojmove, pokazati njihovu upotrebu, prikazati uspešne primere iz ove sfere i predstaviti rešenja i preporuke za daljnji razvoj.

Istraživački cilj ovog rada jeste izvršenje analize elemenata koji se tiču teme uloga i uticaj sporta i zabavne industrije na društvenu odgovornost i opšte dobro. Cilj ovog članka jeste analiza trenutnog stanja, potreba, prepreka i prilika koje ova oblast pruža kao i prikazivanje uloge uticaja sporta i zabavne industrije na društvenu odgovornost i opšte dobro.

Ovakva analiza bi trebala da bude temelj o prikazanim konceptima i inspiracija za nove strategije i planove kao i implementacija istih. Nadamo se da će, nakon sumiranja zaključaka i preporuka, ovaj rad biti podsticaj u daljem razvoju ove teme.

3. METODE I METODOLOGIJA

Istraživanje u ovom članku je rađeno širokom skalom naučnih metoda i procedura. Prvi deo je fokusiran na različite definicije. U ovom delu smo analizirali razne konferencije, izveštaje, naučne člankove kao i publikacije od raznih autora (npr. Friedman, M. (1970), Desjardins, J. R. & McCall, J. J. (1990), Mulligan, T. (1986), Edmans, A. (2015), Kenton, W. (2018), Common Goal (2018), B Corps (2018), Homeless World Cup Fondation (2018), Smart kolektiv (2018)).

Metodologija sadrži identifikaciju istraživačkih pretpostavki, kao i metode i izvore korišćene u radu. Rezultati se sastoje od glavnih nalaza i pripremaju se pomoću komparativne i deskriptivne analize kao i empirijske studije slučaja Common Goal, B Corps i Homeless World Cup, sto je rezultiralo sastavljanjem liste preporuka za buduća istraživanja i aktivnosti za dalji razvoj ove teme.

4. TEORIJSKA OSNOVA

Definisanje pojmova društvena odgovornost i opšte dobro predstavljaju otvorenu priliku za široku debatu, pošto se zadnjih godina sve više i više pominju u naučnoj literaturi. Pojmovi polako dolaze do ljudi koji počinju da shvataju njihovo značenje i značaj za društvo.

Naučni članak koji je pokrenuo razmišljanje i mnoge debate između naučnika na ovu temu je bio napisan 1970 godine od strane autora Milton Friedman-a, koji je napisao da društvena odgovornost biznisa jeste da poveća svoj profit. [2] U ovom članku autor prikazuje značaj uspeha korporacija i da svi zaposleni treba da se ponašaju u skladu sa rastom i najboljim interesima svojih korporacija. Među mnogim autorima koji su analizirali ovaj članak su i Joseph R. Desjardins i John J. McCall (1990) [3] kao i Thomas Mulligan (1986) koji u svojoj kritici navodi da su glavni argumenti Milton Friedman-a neuspešni, da ponekad nedostaje logička uverljivost, kao i da ne uspeva da dokaže da je ostvarivanje društvene odgovornosti u biznisu po prirodi nepravedna i socijalistička praksa. [4]

Sa druge strane, Alex Edmans u jednoj svojoj prezentaciji na konferenciji [5] postavlja pitanje na osnovu ovog rada – Zašto postoje korporacije? Da zarade ili služe svrsi? Za akcionare ili za društvo (kupci, zaposleni i okruženje)? Kako navodi Edmans, prema konvencionalnom pogledu to je isključivo profit, jer da bi ostvarile profit kompanije su primorane da brinu o društvu. To konkretno znači da moraju proizvoditi proizvode visokog kvaliteta, ili će kupci prestati da ih kupuju. Moraju dobro tretirati svoje radnike, jer će u suprotnom radnici napustiti korporacije. I naravno, korporacija ne može da ugrožava životnu sredinu jer će to narušiti reputaciju njenog brenda.

Među novijim teorijama i definisanjem društvene odgovornosti bi smo istakli definiciju Will Kenton-a koji navodi da: Društvena odgovornost jeste ideja da kompanije treba da balansiraju aktivnosti koje donese profit sa aktivnostima koje donose korist društvu. To uključuje razvoj biznisa sa pozitivnim odnosom prema društvu u kojem deluju. [6]

Industrija sporta i zabavna industrija

Kada govorimo o industriji sporta i zabavnoj industriji, bitno je da shvatimo kako su ove dve industrije usko povezane i koje sve industrije imaju uticaj medjusobno jedna na drugu u ovoj sferi.

Slika 1: Zabavna Industrija



Primer toga kako su industrije iz slike 1 povezane i da nekad može biti nejasno u koju kategoriju spada određena aktivnost može biti sledeća: Zamislimo da Kulturno društvo organizuje skup mladih u svojim prostorima, i u okviru tog druženja organizuje turnir u igranju sportskih video igrica, koje su oficijalno licencirane od sportskih asocijacija/federacija (npr. FIFA, NBA, NFL itd.) i koje koriste realne sisteme takmičenja, igrače, stadione itd. iz svojih federacija. Da li ovo spada u kulturna okupljanja, skupove i događaje, sport ili igrice?

5. PRIMERI

Common Goal

Common Goal je projekat čija je svrha ujedinjavanje globalne fudbalske zajednice u rešavanju najvećih društvenih izazova našeg vremena. [7]

Prema “Common Goal” [7] - Sa više 3 milijarde fanova, fudbal je najveći društveni fenomen na našoj planeti. Nijedan drugi sport se ne može pohvaliti takvim bogatstvom, takvim dosegom, ili takvim kulturnim značajem. Za mnoge, igra formira zajednicu. Ona povezuje ljude i stvara

zajednički jezik koji svi mogu da govore. Za neke, već služi kao moćno sredstvo za rešavanje društvenih izazova u njihovim zajednicama – ali ne postoji sistemska veza između profesionalne igre i mnogih fudbalskih organizacija u zajednici širom sveta.

Stvaranjem potpunije veze između fudbalera, menadžera, navijača, organizacija, brendova i fudbala za dobrotvorne organizacije, možemo se pridružiti globalnoj fudbalskoj zajednici zajedno u timu koji je dovoljno velik i dovoljno jak da preuzme najteže protivnike na svetu – od HIV/AIDS-a do rodne neravnopravnosti i nezaposlenosti mladih. [7]

Ideja je jednostavna - članovi “Common Goal”-a obećavaju 1% svoje zarade centralnom fondu. Zajedno sa organizacijom dodeljuju ovaj fond organizacijama koje imaju jak uticaj i koje koriste snagu fudbala kako bi unapredili globalne ciljeve Ujedinjenih Nacija.

B Corps

“B Corps” vodi globalni pokret ljudi koji koriste biznis kao snagu za dobro. U opisu svoje vizije [8], “B Corporation” navodi da imaju san da će se jednog dana kompanije takmičiti ne samo da budu najbolje na svetu, ali i da budu najbolje za svet – za društvo i okolinu. Istomišljenici i pokretači ovakvog pokreta su se ujedinili i počeli da pretvaraju ovaj san u zajednicu.

U ovom momentu postoji 2,655 kompanija iz 150 industrija iz 60 država koje imaju sertifikat B Corporations [8]. Sertifikovane korporacije B su nova vrsta poslovanja koja balansira svrhu i profit. Oni su zakonski obavezni da razmotre uticaj svojih odluka na svoje radnike, kupce, dobavljače, zajednicu i životnu sredinu.

Ovo je zajednica lidera, koja pokreće globalni pokret ljudi koji koriste posao kao snagu za opšte dobro.

Homeless World Cup

Fondacija Svetskog prvenstva za beskućnike je jedinstvena, pionirska dobrotvorna organizacija koja koristi fudbal kako bi inspirisala ljude koji su beskućnici da promene svoj život kroz moć fudbala, i da promene percepciju javnosti o beskućništvu i pitanjima oko njega [9].

Ovo prvenstvo se održava svake godine. Više od 50 timova (muškaraca i žena koji su beskućnici) imaju šansu da reprezentuju svoju državu na završnom turniru koji traje nedelju dana. Ove godine Svetsko prvenstvo za beskućnike je bilo održano od 13 – 18. Novembra u Mexico City-ju [9].

6. ZAKLJUČAK I PREPORUKE

Cilj ovog članka je bio da sagleda trenutno stanje i potrebu za društvenom odgovornošću i opštim dobrom. Društveno odgovorne kompanije mogu da utiču na bolji kvalitet ljudskih života a takođe i da utiču na budućnost naše planete ulaganjem u zaštitu životne sredine, reciklažu i klimatske promene.

Istraživanjem i analizom dostupnih podataka došli smo do zaključka da vrhunski sportisti i poznate ličnosti iz zabavne industrije koji su idoli većini ljudi na planeti mogu da utiču u istoj meri kao i velike korporacije na društvenu odgovornost i opšte dobro. Dobar primer iz prakse jeste Common goal.

Na osnovu naše analize podataka i istraživanja želimo da preporučimo nekoliko ključnih koraka. Sportski idoli i poznate ličnosti iz sveta zabavne industrije bi trebalo da promovišu podršku lokalnoj zajednici u novčanoj ali takođe i u nenovčanoj pomoći. Jedna od najbitnijih preporuka jeste poboljšanje radnog okruženja u koje spada razvoj zaposlenih, korporativno volontiranje, zdravlje i bezbednost na radu. [10]

Kod razvoja zaposlenih smatramo da je bitno da sportski klubovi imaju i obavezu da u saradnji sa vrhunskim sportistima promovišu principe koji doprinose opštem dobru. Prvi korak jeste edukacija sportista i poznatih ličnosti iz sveta zabavne industrije o društveno odgovornom ponašanju u javnosti ali takođe i u privatnom životu.

Preporuka za klubove i korporacije jeste da se i oni ponašaju društveno odgovorno. Ovo je jako bitno iz razloga što posetioci sportskih i zabavnih manifestacija kopiraju svoje idole. Svaka poseta nekog sportskog događaja ili zabavne manifestacije treba da ima pored zabavnog i edukativni karakter (npr. sortiranje i recikliranje otpada, veća tolerancija i ravnopravnost).

Unapređivanje mehanizama za prenos znanja je jedna od naših preporuka koju vlada može uspešno da sprovede u praksu organizacijom događaja u koje će biti uključeni i glavni akteri iz industrije sporta i zabavne industrije, u cilju prenošenja znanja i podizanju svesti o društvenoj odgovornosti i opštem dobru.

Sportisti i poznate ličnosti mogu biti pokretači pozitivnih promena u društvu. Mladim ljudima uspešni sportisti služe kao inspiracija i oni veoma često svojim ponašanjem kopiraju svoje idole. Iz tog razloga želimo da istaknemo značaj rada sa mladim ljudima u ovom segmentu.

U današnje vreme je jasno da su društvene mreže i internet preuzele primat i ulogu klasičnih medija kao i izvora informacija, tako da ove kanale možemo iskoristiti u cilju edukacije i podizanja svesti kod mladih ljudi.

Ovaj rad treba da posluži kao temelj i inspiracija za nove strategije, planove kao i podsticaj u daljem razvoju ove teme.

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MEDIA HABITS AND COMMITMENT TO SUSTAINABLE DEVELOPMENT

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Abstract: *The link between media habits and the formation of an ideal view of sustainable development (SD) is poorly researched in scientific literature. Based on an empirical study among 229 Bulgarians, this report examines the role of different media channels in the formation of consumer expectations and assessments about the role of the four actors in achieving SD: the State, Business, Society, and the Individual. The results show that there exist relations between media habits and expectations' formation, whereas such links are not expressed in assessing achievements in terms of SD.*

Keywords: *sustainable development, media habits, actors of sustainable development, expectations, assessments*

1. INTRODUCTION

Just like every idea, from a marketing point of view, the concept of sustainable development can be seen as a product. As with any other product, the realization of this concept depends directly on the mix of incentives used to gain wider popularity, attract support, and ultimately bring together a sufficient number of people and institutions to make it true. Though for the realization of the sustainable development concept it is of utmost importance how it is communicated to target audiences and it is the effectiveness of this communication what may or may not transform it into a successful product.

In Marketing there are developed a number of methods, metrics, and techniques to measure the effectiveness of communications during campaign planning and execution. In contrast to market organizations, where the return on money invested in advertising and communications is explored in detail, when it comes to the market of ideas, this assessment is more difficult due to the lack of monetization from the implementation of the idea. At the same time, marketing budgets for ideas, and in particular those related to sustainable development, do not fall short of those of commercial products. For example, in Bulgaria the amount of 2,410,042.00 BGN, 85% of which provided by the European Regional Development Fund, was spent only for a year under the project "Activities related to the promotion of OPE in the implementation of the National Communication Strategy 2014-2020 during the period 2017 – 2018" [1]. This amount is equal to the annual budget for online advertising of beer, strong alcoholic beverages, food supplements, oral medications and chocolates taken together [2]. However, are the financial resources invested in the realization of sustainable development ideas effectively used?

Media is believed to shape public debate in terms of setting agendas and focusing public interest on particular subjects [3]. When it comes to fostering sustainable development it can be an

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effective instrument for environmental behavioural change [4, 5], sustainable and green buying behaviour [6, 7] for example. An important point, however, is to study media habits with regard to the communication channels that people use to inform about sustainable development ideas and issues. This report links the demographic profile of respondents with the media channels they commonly use. Another point of analysis are the links between existing expectations of solving environmental problems, social inequality and sustainable resource management on the one hand and on the other the communication channels used to gather information on these topics. The media habits of Bulgarian consumers are investigated. There is also analysed the impact of different media channels on the formation of opinions regarding the importance of different factors and roles for achieving sustainability and the assessment of respondents on the current state of sustainable development.

2. METHODOLOGY

The rationale behind this paper focuses on three main questions: 1) what are the media habits of respondents; 2) how are they aligned to their demographic and behavioural characteristics and 3) do they influence their perceptions of the role and the effectiveness of the main players for achieving sustainability. Media habits are examined regarding the preferred communication channels used by respondents to inform about ideas and problems of sustainable development. There are used five distinct categories: mass media, social media, social networks, institutions and NGO's. The mass media category comprises the traditional media channels such as television, radio and press. Social media stands for platforms such as Facebook, Instagram, Twitter, etc. where consumers generate content themselves and share it among their audiences. Social networks designate the network of personal and professional contacts (family, friends, co-workers, acquaintances) where information is constantly being transmitted. The institutions as a media channel, however, encompass all kind of communication channels used officially by governmental and local authorities to communicate their politics. The same applies to the NGO's category.

The range of demographic characteristics examined here comprises common categories such as age, gender, level of education, family status and residence. The behavioural characteristics of interest are the level of satisfaction with personal income which might be informative in terms of trigger for civil activism, the sensitivity to social problems as self-reported by the respondents and prior acts of active citizenship such as volunteering, participation in protests and donating to NGO's in the past 3 years.

Respondents' perceptions of the role and the effectiveness of the main players for achieving sustainability are measured using a dual scale that focuses on the importance and the effectiveness of the State, the Business and the Society and Individuals when it comes to their actions to foster sustainable economic growth, environmental protection and social equality. The scale is originally developed in [8] for measuring the gap between the ideal view of sustainable development and its perceived current state. The scale comprises 46 statements measuring the importance of the main players for sustainable development which are mirrored by another 46 statements reflecting their effectiveness. The statements are divided in groups to form the following three zones of sustainability: socio-economic equity, resources viability and bearable living conditions.

The research instrument used to address the research problems is a questionnaire distributed online among Bulgarian population. The total number of respondents is 229. The sample comprises people representing varied age groups (less than 18 to over 65), different educational

background and diverse behavioural characteristics with regard to sustainable practices (active to passive). The data obtained are analyzed through descriptive statistical methods, hypothesis testing and correlation analysis. There are tested the existing relationships between respondents' demographic and behavioural characteristics and their media habits as well as the link between preferred sources of information and perceptions of the role and effectiveness of the main players for sustainable development. This allows for the evaluation of the influence of different media channels to the formation of views and assessments regarding sustainable development.

3. RESULTS AND DISCUSSION

The first research task is to tests the existence of links between demographics (such as gender, age, place of residence, etc.) and behavioral characteristics (such as sensitivity to social problems, participation in protests and donations, etc.) and the usual communication channels used by the respondents to keep informed about social and / or environmental issues (Table 1). Links between demographic and behavioral characteristics and the use of media channels are tested by conducting a correlation analysis using Pearson's coefficient.

Table 1: Media Habits and Demography

| Demography | Common sources of information for social problems | | | | |
|-----------------------------------|---|--------------|-----------------|--------------|--------|
| | Massmedia | Social Media | Social Networks | Institutions | NGO's |
| Gender | n/s | n/s | n/s | n/s | n/s |
| Education | n/s | n/s | n/s | n/s | n/s |
| Residence | n/s | n/s | n/s | .208* | n/s |
| Age group | n/s | .319** | n/s | n/s | n/s |
| Satisfaction with personal income | n/s | n/s | n/s | n/s | .259** |
| Sensitivity to social problems | n/s | n/s | n/s | .267* | .394* |
| Volunteering experience | n/s | n/s | n/s | .170* | .207* |
| Participation in protests | .159* | n/s | n/s | .144* | n/s |
| Donations to NGO's | n/s | n/s | n/s | n/s | .273* |

*The *r* coefficient is significant at ,01

**The *r* coefficient is significant at ,05

No statistically significant links are found between the demographics and the social networks as a communication channel. Regarding mass media and social media, there are found two existing links. The first is between the prior experience in civil protests and the mass media. Within the specificity of the Bulgarian reality this dependence can be explained by the fact that protests against the actions of governmental and municipal authorities when they miss to defend public interests (regarding protected areas and biodiversity for example) are common and these always have an important place on the newspapers and electronic media. As can be seen from Table 1, however, this relationship is weak because the correlation coefficient has a value of only 0.159. The second link – between the age and the role of social media - has a correlation coefficient of 0.319, whose value is at the boundary between a weak and a moderate strength. This is also understandable because the use of social media in Bulgaria is more closely related to the profile of young people than to older people.

The other two channels - institutions and non-governmental organizations - draw a different picture. The number of existing links is significantly higher - four for the institutions and

another four for non-governmental organizations. However, these links are weak to moderate (the correlation coefficients range from 0.144 to 0.394), and they are only between the corresponding communication channel and some behavioral characteristics of the respondents.

On the basis of the analysis, two specifics of the examined situation for Bulgarian consumers can be identified. Firstly, the demographic and behavioral characteristics of respondents do not determine the preference of traditional media channels and social media as a source of information on social and environmental issues. On the other hand, the role of behavioral characteristics, albeit weak, can be considered as influential to the choice of institutions and non-governmental organizations as a source of information on these issues.

Table 2: Media Habits and the Gap between Importance of Sustainability Factors and Their Assessment

| Zones of sustainability Common information sources for social problems | Number of statistically significant relations found | | | | | | | |
|---|---|------------|---------------------|------------|----------------------------|------------|------------|------------|
| | Socio-economic equity | | Resources viability | | Bearable living conditions | | Total | |
| | importance | assessment | importance | assessment | importance | assessment | importance | assessment |
| Massmedia | 7 | 0 | 10 | 1 | 4 | 2 | 21 | 3 |
| Social Media | 0 | 3 | 1 | 0 | 0 | 6 | 1 | 9 |
| Social Networks | 0 | 2 | 2 | 2 | 0 | 0 | 2 | 4 |
| Institutions | 1 | 0 | 1 | 0 | 0 | 0 | 2 | 0 |
| NGO's | 1 | 3 | 1 | 2 | 0 | 5 | 2 | 10 |
| Total | 9 | 8 | 15 | 5 | 4 | 13 | 28 | 26 |

In the second part of the study, a total of 610 χ^2 tests are conducted to check whether there exist any links between the media habits of the respondents and their subjective perceptions about the gap between the importance of sustainability factors and the assessment of their current state in Bulgaria. As a result a total of 54 significant relations are found where the Phi and Cramer's V coefficients occupy values falling within the range from weak and moderate strength (Table 2). The greatest number of links is observed between the use of mass media as a channel for gathering information on social and environmental issues and the subjective judgments about the importance of different factors related to sustainable development - a total of 21. At the same time, however, it is remarkable that there are only three links between the use of this media channel and the assessment of the current state of these factors. There is reverse dependence on social media. Only one connection is found with the importance of these factors, while with their assessment the links are nine. A similar correlation is observed for the other three media channels, with the only exception being between institutions and sustainability assessments, where no link is found. As with the first group of analyzed variables, the correlation coefficient values here show the presence of a relationship that is on the border with the moderate. In interpreting these results, however, the following conclusion can be drawn: Traditional media is much more influential on people's perceptions of the importance of individual factors that influence sustainable development while people do not trust television, the radio and the press in shaping their assessments to what extent this sustainability has been achieved. At the same time, although they do not directly influence the formation of the perceived importance of sustainability factors, social media, social networks and non-governmental organizations have a much greater impact on people's assessments of the extent to which this sustainability has been achieved. This phenomenon can also be explained by the continuously declining confidence in traditional and social media globally. According to the 2018 Elderman Trust Barometer nearly 7 in 10 worry about false information or fake news being used as a weapon and 59% believe that media are preoccupied to support ideologies instead of informing the public [9].

On the basis of the analysis made, several recommendations can also be drawn regarding the realization of the concept of sustainable development, considered as an intangible product. When planning the communication mix with audiences similar to the Bulgarian (to its demographic and behavioral characteristics), it is advisable to use the traditional media channels such as radio, television and the press to promote the importance of social and environmental issues. Since the assessment of the extent to which goals related to sustainability are achieved is of great importance as well (with regard to motivation to participate in all processes of the realization of ideas), analyzes and assessments of the results achieved should be communicated not through mass media, but through media channels where people generate and disseminate information by themselves such as their social networks and through non-governmental organizations involved in these processes. Otherwise, the use of mass media would have a reverse effect and instead of attracting new people to the realization of sustainability ideas would push them back.

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ANALYSIS OF THE FEEDBACK MECHANISMS IN AIRLINE INDUSTRY

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Abstract: *Airlines are operating in the volatile environment that is characterized with unpredictable external factors such as changes in fuel prices, increase of airport fees and increase in other service costs. This all is having a significant influence on prices and quality of service that airline is offering to passengers. In this situation, feedback from the passengers about the flight and service they experienced, is very important and useful. Airlines are using this information to align their pricing and commercial strategies and to improve their operations. Today's passengers expect transparent, personalized and high-quality service which could be delivered by omnichannel. Aim of this paper is to analyze the current feedback mechanisms available and used in the airline industry for the passengers to share their flight and service experience. After analyzing the current mechanisms, the second aim is to identify the potential areas for mechanisms improvement.*

Keywords: *Airline industry, feedback mechanisms, passenger, service quality.*

1. INTRODUCTION

Unpredictable and constantly changing environment is driving the way how airlines operate nowadays. The whole airline industry is under constant pressure of external factors such as changes in fuel prices, increase of airport fees and increase in other service costs. This all is significantly influencing on the changes in fares and prices, as well as the quality of the service that airline is providing to passengers. Following the business best practice established in all industries, carriers are also gathering feedback from the passengers about the flight and service they experienced. This information could be very important and useful, and airlines could use them to adjust and align pricing and commercial strategies and to improve current flight operations.

Carriers need to have a reliable way of collecting and analyzing feedback from passengers. On the other side, passengers are expecting transparent behavior of airline, personalized and high-quality service. Following the latest trends and complexity of services airlines are offering, there are a variety of areas in which passenger could be disappointed. Due to the presence of social networks, nowadays even one bad/wrong move of airline during the service delivery, could have a tremendous impact on business operations. One of the good examples of this could be found in [1] from the April 2017. What happened is that passenger was involuntary off boarded from the plain which upset other passengers that were on the plain, and some of them shared this behavior on social network. What was the final outcome? Airline CEO needed to apologize in public, offer compensation and eventually trigger the revision of the airline procedures.

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There are numerous possibilities and mechanisms how passenger could share feedback, but the issue is how airlines can motivate them to do this. When everything is ok, usually there is no feedback, but when there are some issues or troubles with the service part, complaints are filed. Aim of this paper is to analyze the current feedback mechanisms available and used in the airline industry for the passengers to share their flight and service experience. After analyzing the current mechanisms, the second aim is to identify the potential areas for mechanisms improvement. This paper is divided as follows. In the section 2, literature review is provided. Following that in section 3, analysis of the current mechanisms is performed and possible areas for the improvements are given in the section 4. At the end, concluding findings are presented in section 5.

2. LITERATURE REVIEW

As indicated and showed in [2], large companies are highly concerned with obtaining information on customer satisfaction. Loyalty of a customer, as explained by Lawfer [3], is reflected through the company's service. It is indicating that customer decided to continue to use services of the company and also, that the company is able to provide those services on regular basis. Not all received feedbacks are positive ones by default. What is one of the key drivers of the customer satisfaction and what is driving their decision to stay with an organization, is the handling of the complaints. A complaint definition could be found in many early researches and published papers, such is the one from 1988 by Fornell and Wernerfelt [4]. As stated by the authors, a complaint represents an expression of dissatisfaction that is communicated to a company, related to its products and/or services. Furthermore, if the customer is unsatisfied, he/she may choose to move to competitor and/or engage in a negative word of mouth communication [5].

When it comes to the airline industry, one comprehensive analysis of the feedback and customer complaint mechanism could be found in [6]. The research is addressing EgyptAir and its current feedback process. Authors managed to capture several issues related to the current feedback mechanisms: (i.) *A lack of top management commitment to effective handling of customer complaints*, (ii.) *A reactive approach to complaints handling* and (iii.) *Poor communication network reflected in a slow handling of complaints*. Another feedback mechanism example is described in [7]. Using the personal electronic devices, screens installed in airports or onboard in-flight entertainment, airlines are gathering feedback from the passengers. More precisely, this is the case with the Ryanair that introduced a Rate My Flight feature to the mobile app. This is enabling passengers to give the airline real time feedback. Another good, and publicly available portal for flight experience could be found on TripAdvisor website in the airline review section [8]. Following good and proactive approach, TripAdvisor is collecting information from multiple sources like user behavior, stated preferences of users from the sites if the user is logged. Furthermore, most service providers can remind user who stayed in specific hotel, or used specific airline, to post a feedback on a TripAdvisor.

3. ANALYSIS OF CURRENT MECHANISMS

For the purpose of this paper, feedback mechanism from two global providers were analyzed. First one is mechanism offered by TripAdvisor [8], which is widely used by passengers whose aim is to gain insight into travel tips. Second is mechanism offered under the Amadeus customer experience management service [9] which is used as an add-on to the Amadeus Passenger Service System and it is used by airlines. The aim of the analysis is not to compare the two

mechanism providers, but to highlight strengths and weaknesses, as well as to identify possible areas for improvement.

This analysis will be addressing next major characteristics:

- Mechanism type and orientation,
- Monetization type,
- Hosting/access type,
- User perspective, and
- Rewards perspective.

In regards to the *mechanism type and orientation*, TripAdvisor is basically a social media tool. It is open and used both by companies and travelers. All the feedback that is left on this service through form of the website or application is publicly available. It could be used both by companies and travelers to collect feedback. On the other side, Amadeus service is system used only by companies to gather insights from the passengers about their flight experience and preferences. But, at the same time, it is offering a profile management options and can provide passengers information about themselves which they didn't know and help them with easier future reservations.

Monetization type is differentiating the way how the feedback mechanism is available - free or charged. For the TripAdvisor, it is allowing free access to travelers, not only to post the feedback, but to look and review feedback from other travelers. The site is achieving revenue by offering affiliate program, sponsor placement, advertising and ownership optimization with tracking performance. For the Amadeus, it is totally different approach. It is a paid system, usually fees are calculated using the number of passengers boarded for some time period.

Hosting/access type determine the way how the solution is provided and available to the passengers. TripAdvisor is offering two ways of accessing the feedback mechanism and portal - through website and using the native app. When it comes to the Amadeus, the service is available through airline owned portals.

User perspective represents the look and feel, and detail level of the feedback form. For TripAdvisor, feedback form is having only several fields like: title of review, description, origin and destination, class of service and period of travel. The aim is that passenger can publish review in the shortest possible time, and everything is straightforward, without going into personal data. On the other side, Amadeus is offering personal approach, because that system is not exposed to the public. Thus, user can enter his or her nationality, personal details, document numbers, data of birth, frequent flyer number, communication preferences and etc.

Rewards perspective determine if the passenger is rewarded somehow for spending time and leaving the review about flight experience. For TripAdvisor, reward is like on any other social media stream, practically it is a feeling of satisfaction that your voice is heard and that you helped others with their travel decisions. Also, there are TripAdvisor points that are assigned to travelers after posting a review, but those points cannot be redeemed for anything and passengers are not earning any airline miles or any other benefits. Those points only determine the level of the badge for the person who is posting a review. When it comes to the Amadeus, it is offering a passenger to connect frequent flyer number with the profile and have statistic of flights such as: average flight distance, number of flight segments in the last year, history of flights and tier of the frequent flyer and what is the next level and under which conditions will be achieved.

4. POSSIBLE AREAS FOR IMPROVEMENT

Based on the conducted analysis, several areas for the improvement are formulated. It is not said that the current solutions are not delivering good results, but definitely, certain areas could be improved to provide even better results. As a part of this paper, two areas for the improvement are proposed, both with the aim to improve current mechanisms and boost rate of passengers who are providing feedback.

First improvement is related to the way how the mechanism is functioning. Right now, as indicated, current mechanisms are free, open and comments are publicly available in case of services such as TripAdvisor. This also stands for the airline feedback mechanisms, because airline have information about the passenger who sent review. Since this is not an anonymous service, one can also expect that the further analysis will be biased. Thus, what can be improved, especially with the usage of the latest technologies (such as blockchain), is the unbiased and anonymous dimensions of the service for the passenger reviews in airline industry.

Second improvement is related to the rewarding system. As also noted, current mechanisms are not offering a tempting and enough motivating rewards for passengers to provide feedback regarding the flight experience. TripAdvisor and similar services initiated something that could be similar like this, but still this reward in terms of a points and badges is not tangible enough for the passengers. Furthermore, airlines are not offering any tangible reward to the passengers who are providing feedback, but are exploiting the passenger data for driving the commercial strategies, special offers, promotions and etc. Thus, what can be improved, is the more tangible rewarding system for the passengers who are sharing the experience about the flight. Some of the examples for this could be: loyalty miles, better tier for discounts, contest for prizes or even some amount in virtual currency.

5. CONCLUSION

The whole aim of having proper passenger feedback is to know how to adjust and align service and commercial strategies (pricing, fares, fees), as well as to introduce a long-term customers loyalty. As presented in a book by authors Murphy and Murphy [10], in what is considered to be a service providing industry, just 2% increase in customer retention, has the same monetary value as decreasing costs of operations by 10%. In airline industry, carriers need a reliable way of gathering feedback from passengers. On the other side, passengers are expecting transparent, personalized and high-quality service to be provided by carrier. This highlights the importance of feedback mechanisms.

It is very hard nowadays for airlines to motivate passengers to share their feedback regarding the flight experience. Based on the current practice, if everything is ok, no feedback could be expected, but when there are some issues with the service, complaints are there. Aim of this paper was to analyze the current feedback mechanisms available and used in the airline industry for the passengers to share their flight and service experience. The focus was on the two types of mechanisms, one that is open for all and one that is used by airlines - TripAdvisor and Amadeus customer experience management service. The aim was not to compare these two types, but to highlight strengths and weaknesses, and identify possible areas for improvement. In order to accomplish this, next characteristics were addressed - *Mechanism type and orientation, Monetization type, Hosting/access type, User perspective and Rewards perspective*. Based on the findings, two improvement are identified and proposed - (1) development of unbiased and anonymous service using the latest technologies (such as blockchain) and (2)

development of the more tangible rewarding system for the passengers who are sharing the experience about the flight (loyalty miles, better tier for discounts, contest for prizes, etc.).

For further research direction, we are proposing a survey to be conducted about the feedback mechanisms to the wider audience. It should be free, anonymous and shared through social networks with the aim of gathering as much replies as possible. Responses that will be gathered will provide definitely better insight about feedback mechanisms and could lead to more justified conclusions.

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INTEGRATING NEW PRACTICES FOR RAINWATER MANAGEMENT IN BUILDINGS: TURNING IT INTO A RESOURCE BOTH IN TERMS OF FUNCTIONALITY AND HYDRO EFFICIENCY

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Abstract: *Respect for life and nature passes through a fundamental and indispensable source: water. For thousands of years, rainwater has been recycled using it for personal and environmental needs. Rainwater (also known as “blue gold”) is a sufficient asset that nature has provided us with. Every day more rainwater harvesting becomes even more necessary. During 28 years of democracy in Albania, even the city of Durrës has been subject of massive social economic changes. Because of its characteristics, offering economic and social opportunities, after 1990, it has become one of the most attractive cities for massive population migration from rural areas. This has led to an urbanization process with the doubling of the population and as a result the design of low performance buildings in terms of hydropower consumption and environmental impact. The time when rainwater was treated as “waste” transported through underground sewers, without using it, is gone. In Durrës City, as a touristic city in the summer season, with growing number of tourists in the recent years, the water supply of the area has become quite problematic. It is necessary for families to effectively manage the heavy rainwaters during winter. Approximately five million liters of rainfall every year in Durrës, that evaporate and go to the sea.*

This study seeks to integrate new practices in rainwaters management, planning and design by demonstrating how we can turn this natural resource for sustainable development. The study addresses to an effective planning and management of rainwater inside and outside home, not only in buildings that will be designed in the future, but also in the existing ones.

Keywords: *rainwater management, sustainable development, hydro efficiency*

INTRODUCTION

Rainwater is a main source of the drinking water in the planet. It is known, that rainwater is contaminated with different substances. The level of contamination can vary in function of place and season. Usually first rainwaters are more contaminated than the following. So, it is necessary, to treat the rainwater with regard to the degree of contamination. Collection and practices of collection can be classified in two categories: from ground and from roof drainage system.

The first category is the water collected from ponds, that can be used for irrigation, before going to the sea. The second category is the collection of the water that flows from the roofs before it

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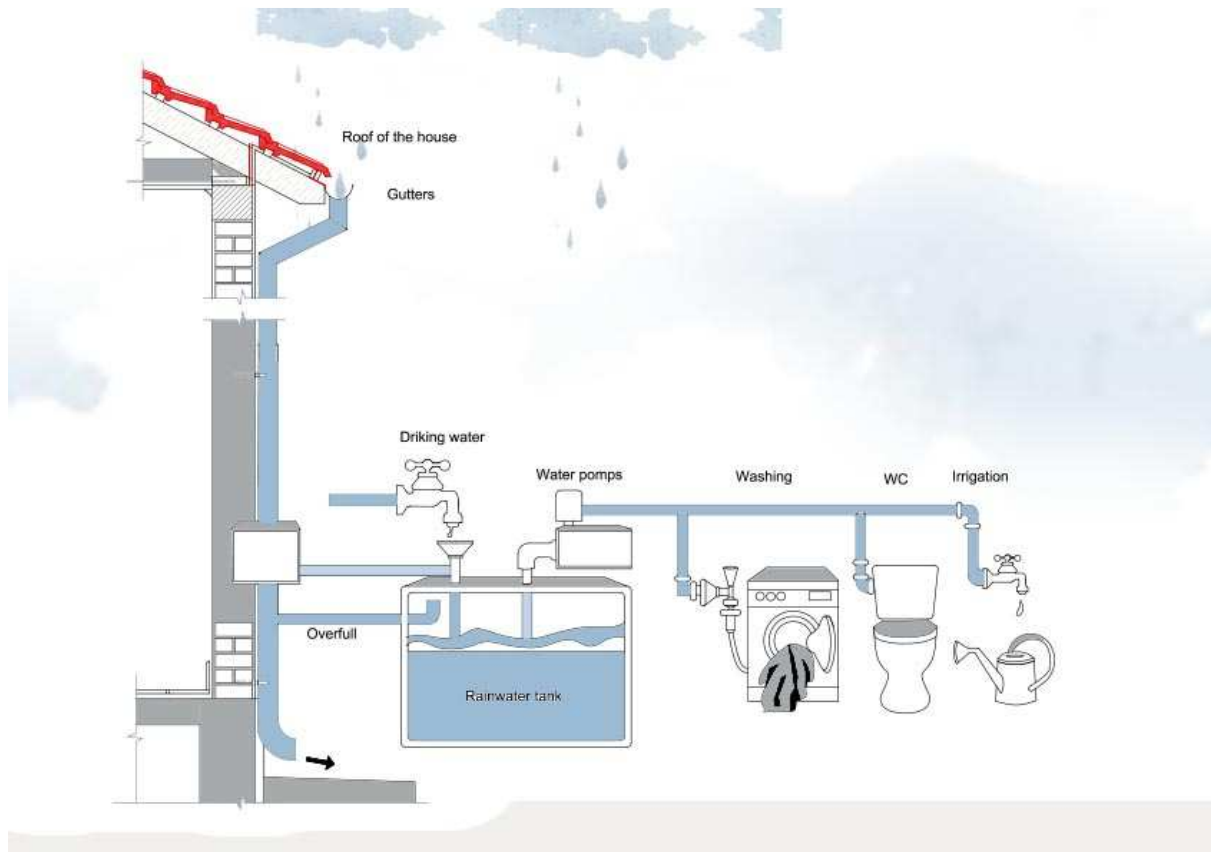
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falls in ground and be absorbed by it. Simply and without consumption. Because of different roof top shape, not all the roof water can be collected. This depends on the top shape coefficient (0.6 - 0.8).

This systems of water collection produce a contaminated water that need to be treated before use. The level of treatment depends on the use of water, e.g. drinking water or water for washing and irrigation of the plants [1].

Figure 1: Use of water for indispensable needs [2]



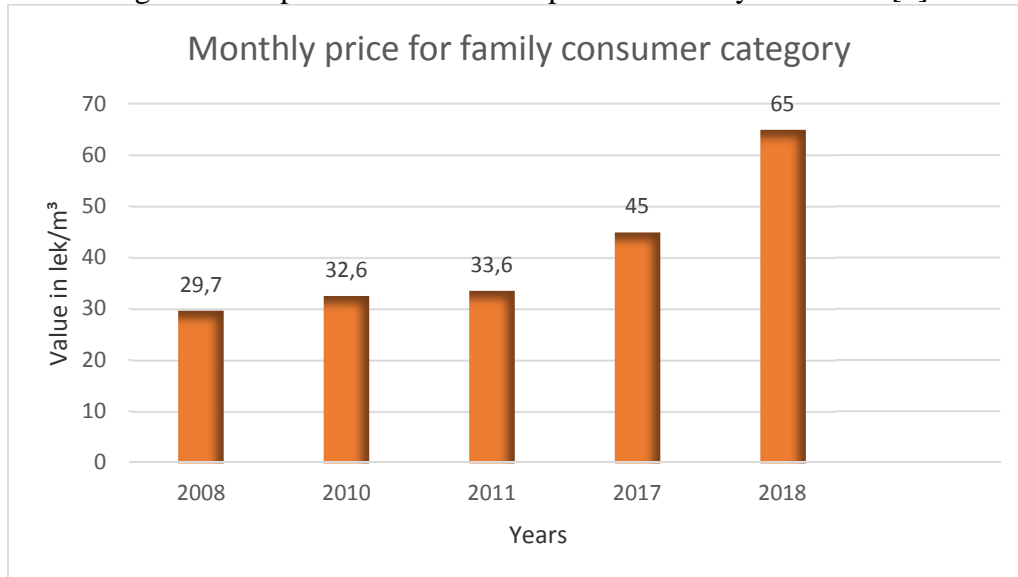
As we plan to collect and store rainwater we should concentrate on:

- the collection and store system. It must be designed in order to be far away from the possible contamination sources,
- the tank volume has to be sufficiently big in order to cover the consumer needs for water up to the next rain, especially in winter, in order to reduce a monthly expense on water consumption,
- different use of the water: cleaning, washing, irrigation, personal hygiene etc. [2].

OBJECTIVES

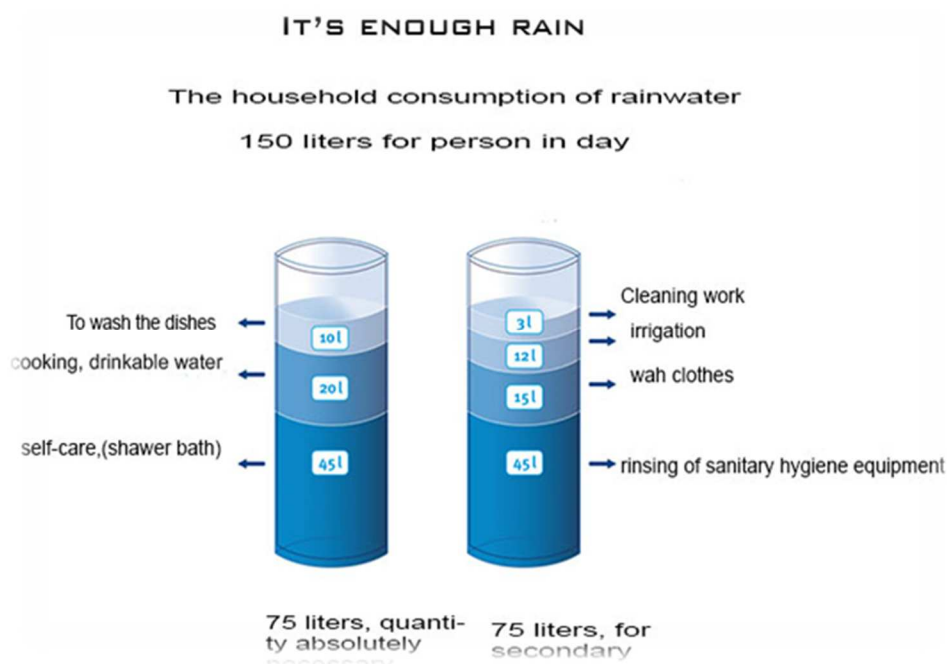
The price of drinking water is becoming more and more expensive for the consumers. The value of drinking water per cubic meter of household consumption is increasing over the years. The following graph shows the fee fluctuations of annual water consumption for family consumer over the years.

Figure 2: Graph of annual consumption for family consumer [3]



This increase makes wonder if it is worth investing in to find a way to reduce the water consumption bill. This depends on the water use from each family and each member of it. One person for indispensable needs consumes on average 75 litres of water/day, and for service needs other 75 litres that are categorised as shown in figure 3 below.

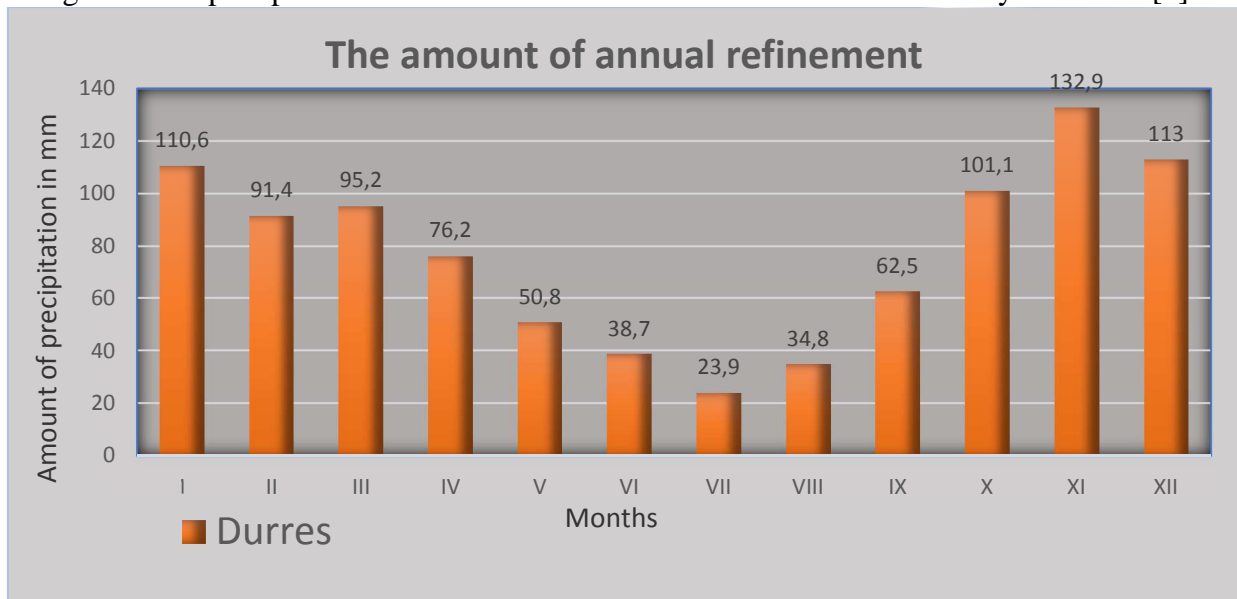
Figure 3: Total daily consumption for a person [2]



- Average number of members for a family: 4 persons,
- Average water consumption for a family: 4 persons x 75 litres = 300 litres of water a day,
- Annual consumption for a family: 300 x 365 days of the year = 112 500 litres of water in a year.

Following the data of the Institute of Hydrometrology of Albania, the annual quantity of rainfall in the city of Durrës is on average 963.4 mm in 116 days of the year [4].

Figure 4: Graphic presentation of annual rainfall amount for 2018 in the city of Durrës [5]



The shape and the roof footprint play an important role in determining the amount of precipitation. For 100 m² of roof, 1 – 2 litres of water are obtained in a min (in our calculations we will consider an average value of 1.5 l/min). For 24 hours are obtained: 1440 min x 1.5 l/min = 2 160 l/day of water. Total number of rainfall days 116 days x 2 160 l = 250 560 litres of water in a year [1].

If this quantity of water is managed and collected rightly, then the quantity of annual water consumption for family will be reduced. If there is not possibility to collect rightly this quantity of water, then either we will increase the size of the collection system or use the other source of the drinking water supply system from the public network.

Case study 1

The building under study was built in 1976 at the request of the Executive Committee of the district of Durrës. The building includes 3 residential floors. During the period under construction, residents were supplied with potable water from the public network. Over the years, with the advent of democracy, the number of people in the city has been increased significantly, as the seaside town in the summer season awaits a considerable number of tourists, which increases the need for drinking water, reducing it to a timetable determined by the municipality. Rainwater collection stands as the closest solution to the water crisis. Rainwater recovery systems are relatively inexpensive and the whole principle can enjoy high efficiency, the only limit that is imposed is the reservoir capacity and the collection surface [6]. It is time to manage rainwater as much as possible to ease the need for drinking water.

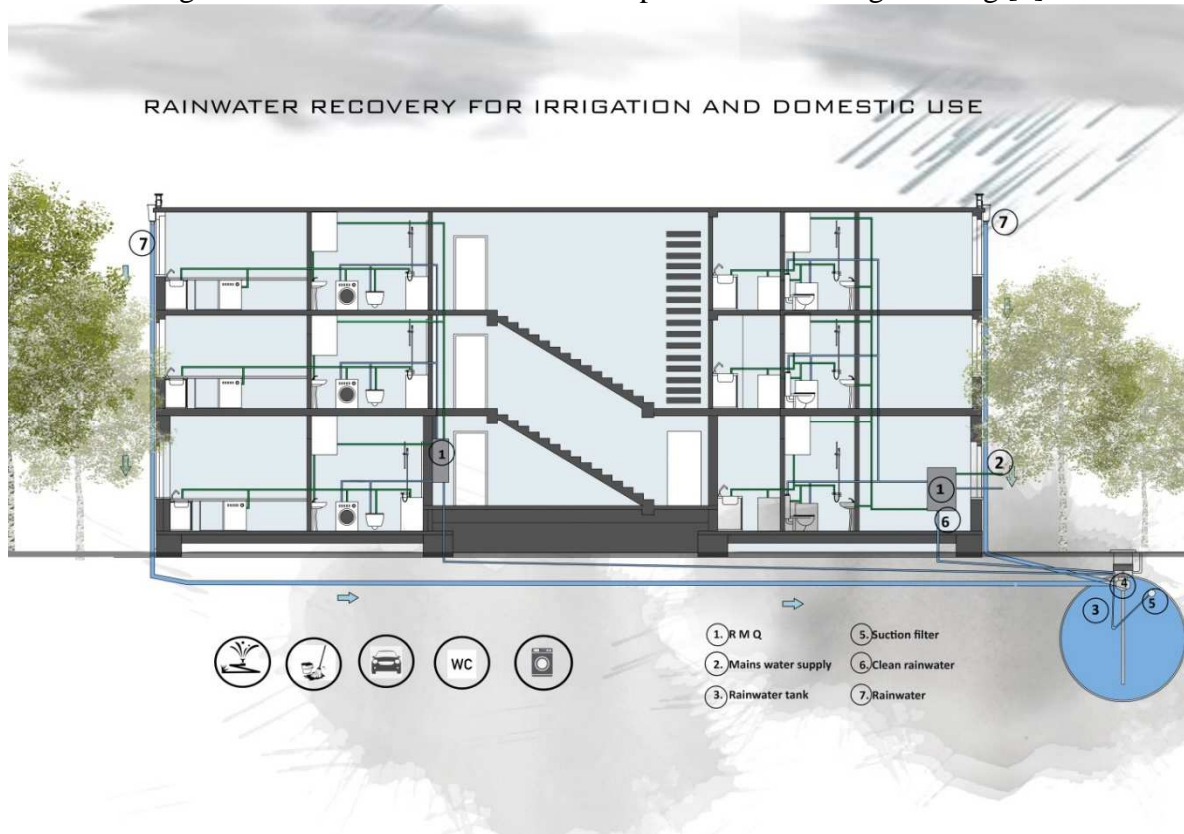
A rainwater management facility can be implemented, that can be installed on the ground on public space because of insufficient space. A complete system for domestic collection of rainwater has the following components:

- roof footprint – the surface from which the rainwater will be obtained,
- gutters - that serve to transport the rainwater to the storage units (water tanks),

- 2 filters - one in entrance and one in exit (their function is to collect impurities and to prevent their entrance in the tank).

Total surface of the roof is 260 m².

Figure 5: Installation of the rainwater plant in an existing building [7]



Number of residents in the building is 48 persons. Average indispensable water needs are: $48 \times 75 \text{ l} = 3\,600 \text{ l/day}$. $3\,600 \text{ l/day} \times 365 \text{ days of the year} = 1\,314\,000 \text{ litres of water in a year}$ are needed by the residents of the building for indispensable needs.

For a 260 m² roof, 3.9 litres of water/min are obtained. For 24 hours are obtained: $1\,440 \text{ min} \times 3.9 \text{ l/min} = 5\,616 \text{ l/day}$. Total number of rainfall days in Durrës is: $116 \text{ days} \times 5\,616 \text{ l/day} = 651\,456 \text{ litres of water in a year}$ [2].

Case study 2

As a second case study is considered a villa with a surface of the roof of 116 m². Considering 4 residents in the villa we have the water consumption a day: $4 \text{ persons} \times 75 \text{ l} = 300 \text{ l/day}$. The average consumption for a year is: $300 \text{ l} \times 365 \text{ days of the year} = 109\,500 \text{ litres of water for a year}$.

For a 116 m² of roof we obtain 1.74 l/min. In 24 hours are obtained: $1\,440 \text{ min} \times 1.74 \text{ l/min} = 2\,506 \text{ l/day}$. Total number of rainfall days in Durrës is: $116 \text{ days} \times 2\,506 \text{ l/day} = 290\,696 \text{ litres of water a year}$ [2].

Figure 6: Installation of the rainwater plant in the design of a building

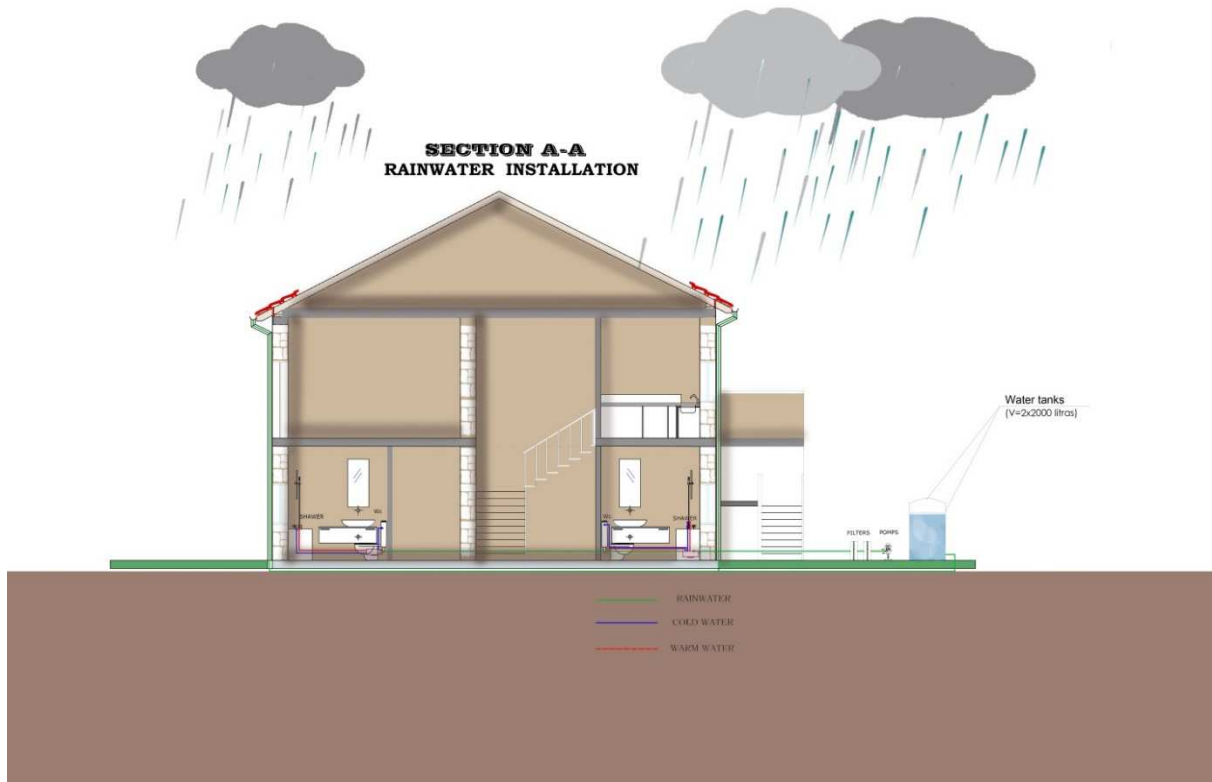


Figure 7: Installation of the rainwater plant in the ground floor

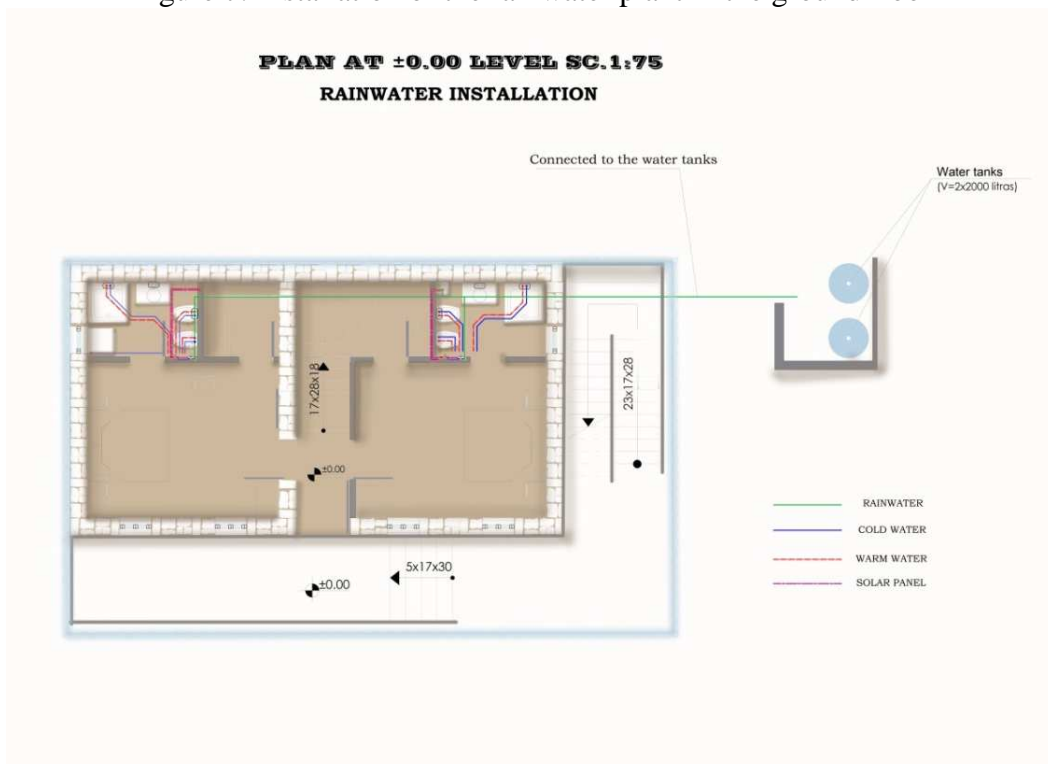


Figure 8: Roof plan

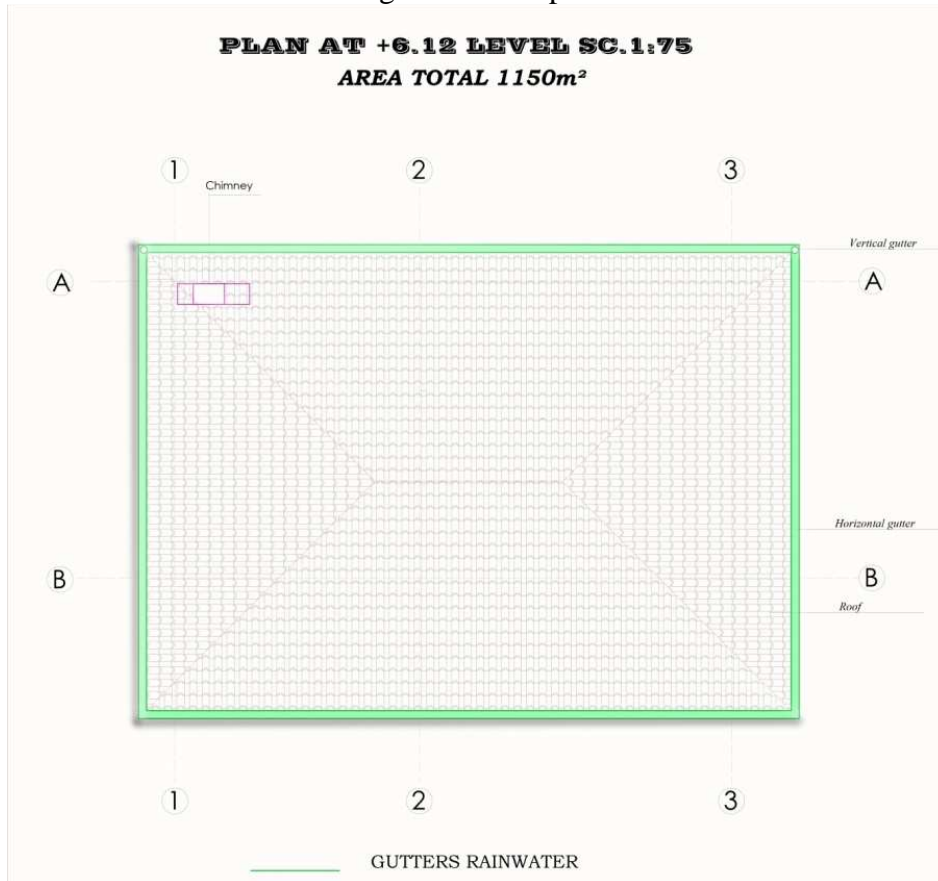


Figure 9: Transfer of the rainwater to the collector

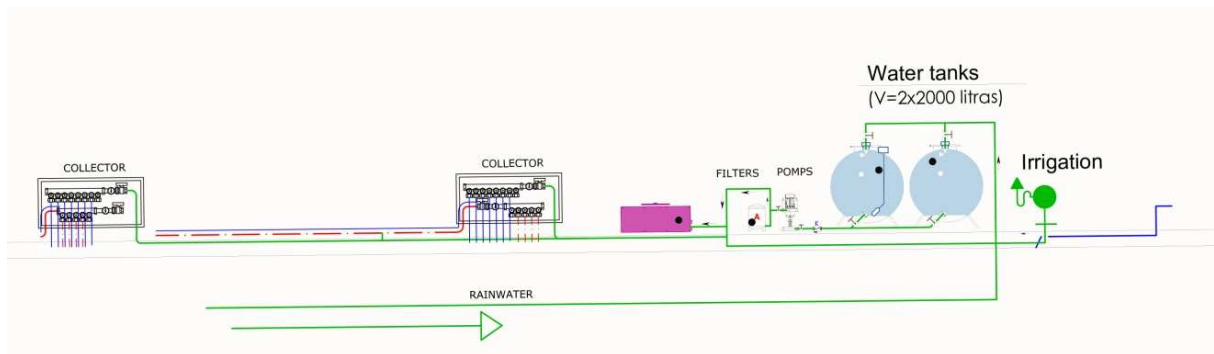
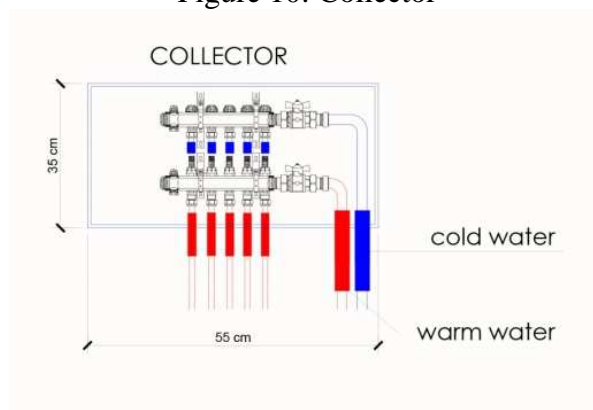


Figure 10: Collector



CONCLUSIONS

Its time to find suitable methods for recycling rainwater, and not to lose it. Each of us should contribute in this sense. The best way to collect rainwater is the installation of a system, that allows the recovery, storage and filtration of rainwater. Such a system should be studied and designed both from the structural and the aesthetic point of view. As far as cost is concerned, the full collection facility (tanker, piping, filters) can cost around 800 euros.

Anyone who wants to install such a system, predicts an economic stability for annual water expenses. Not every one has the economic condition to face the costs of such a system. This is why the rainwater accumulation system (DIY) comes in handy.

When builders and architects will build a new home or building, it is important for them to think about implementing rainwater collection methods. These methods will enable increased confidence in other natural resources for groundwater. In the long run, there will be energy savings, water savings and natural resource savings [9].

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RISK MANAGEMENT MECHANISMS IN AGRICULTURAL HOLDINGS IN BULGARIA

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Abstract: *The agrarian sector is exposed to various types of risks that occur at high frequency and result in many variable outputs for production: production issues, market problems, climate change, etc. The paper dwells on key strategic actions and solutions for agricultural risk management, which can be divided into two main types: informal mechanisms and formal mechanisms. Using informal mechanisms, farmers look for an opportunity to avoid risk on their own. The formal mechanisms are presented on a market or public basis. An analysis of risk management mechanisms in agricultural holdings in Bulgaria is carried out, focusing on public support instruments. It is assumed that risk management measures in agriculture should be rather complementary to financial incentives for the development of science, technology, farmers' awareness, etc.*

Keywords: *risk; risk management; risk reduction; risk mitigation; coping with risk*

1. INTRODUCTION

Agriculture is a sector characterized by particularly high risks, mainly as a result of natural processes linked to the production of agricultural produce, which are beyond the control of farmers and increase their insecurity and instability. Farmers have many opportunities to manage risk in their businesses, usually combining different strategies and tools. Since farmers differ in their attitudes towards risk, not everybody can implement risk management in exactly the same way. While large farms can use a wider range of risk management tools and strategies, small farmers are more risk-sensitive and their risk management instruments are more limited. Assessing the effectiveness of the various risk management strategies and tools requires an understanding of the risk-return ratio of the different farms.

Many of the risks in agriculture are interconnected and can involve a large number of farmers and farms, which requires government intervention. Conducting a specific agricultural policy on risk management in agriculture is important and therefore requires that the issue be studied. Agricultural risk should be understood as an interconnected system in which farmers, markets and governments interact and offer a specific set of risk management measures and strategies in agriculture.

The purpose of this paper is twofold. Firstly, drawing on the nature and sources of risk in agriculture, to propose strategies and instruments to overcome the production risk for agricultural holdings. Secondly, to analyze and propose public measures and instruments for agricultural risk management within the framework of the Common Agricultural Policy of the European Union, in the light of their effectiveness and impact.

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2. THE NATURE OF RISK IN AGRICULTURAL HOLDINGS AND RISK MANAGEMENT

Risk in agriculture can be seen as the uncertainty affecting the welfare of farmers. Risk is most often associated with a reduction in the return on investment and the losses that may be suffered as a result of this uncertainty. Individual farmers have to introduce a set of activities in production and trade which very often produce uncertain results affecting their welfare. According to the OECD (2000) [11], the risk in farming is specific and is distinguished from the risk involved in other businesses in terms of production conditions, the spread of diseases and pests, the impact of climate change, the uncertainty of agricultural commodity prices, implementing specific policies concerning food safety and environmental protection, etc.

Huirne et al. (2000) [6] and Hardaker et al. (2004) [3] distinguish two main types of risk in agriculture. First, business risk includes industrial, market, institutional and personal risks. The production risk is due to the unpredictable weather and productivity of crops and animals. The market risk is related to uncertainty about the cost of production and, sometimes, inputs when taking decision concerning production. Institutional risk is due to government actions and rules such as laws governing the disposal of animal manure or the use of pesticides, tax regulations and payments. Personal risks stem from uncertain life events such as death, divorce or illness. Secondly, financial risks arise from different methods of financing the farm, changes in interest rates and access to loans. Musser and Patrick (2001) [9] followed Baquet et al. (1997) [1] and identified five major sources of risk in agriculture: production risk; market risk; financial risk; legal risk and human risk. Moschini and Henessy (2001) [8] prefer to talk about sources of insecurity in agriculture by separating four different sources: production uncertainty; price uncertainty; technological uncertainty; political uncertainty. According to Bashev (2013) [2], the risk related to the agrarian sector is any current or future danger with a significant negative impact. It is either unsystematic (incidental, unlikely, due to an unpredictable event), or systematic (very likely, due to a predictable event). Regardless of the degree of systemic occurrence and the likelihood of such occurrences, they may derive from nature, technology, human decisions and potential (risk strategy, mismanagement and criminal action, lack of knowledge, information and training) or a combination of these sources of risk.

Farmers have many risk management options, most of them combining different strategies and tools. Farmers face a variety of situations; they have different preferences for risk and return, allowing them to make decisions based on their specific situation. It is argued in the literature [4] that understanding farming risk is important for two reasons. First, most farmers are inclined to take risks when faced with risky results. Those who are more risk-sensitive are willing to accept lower returns because of the lower uncertainty by making a compromise depending on their propensity to avoid risk. Therefore, risk management strategies and tools should not be considered only in terms of expected returns. Secondly, understanding risk helps farmers to circumvent unwanted events, share them or mitigate them to prevent bankruptcy. Therefore, risk understanding should be seen as a starting point in helping farmers make rational management decisions in situations of insecurity and instability.

Risk management in agriculture should not only involve its avoidance, but must be related to finding the best combination of mitigation, reduction or sharing of negative results [3]. Therefore, risk management should include:

- 1) Identification of potential risk events;
- 2) Measuring the likely adverse outcomes of the occurrence of risk and its consequences;
- 3) Adopting a set of actions to overcome the negative results arising from the occurrence

- of risk;
- 4) Risk recovery and creating risk management systems.

The wide variety of risks associated with farming activities naturally generates a variety of opportunities for managing it. There is a certain level of interconnection between the risks from different sources, where the frequency of occurrence and the degree of impact have a great influence. For example, risks associated with frequent events that do not cause large losses can be considered normal (price fluctuations) and are subject to management within the farm. At the same time, events that are uncommon, but can contribute to large losses and have a catastrophic nature (natural elements, disease spreading, etc.) require that solutions are sought outside the farm. The interconnectedness between farms and risk is also important for implementing activities according to the number of farms concerned: whether few farms are affected (the risk is unsystematic) or if a large number of farms are affected (the risk is systematic). Systematic risks are more difficult to manage within the sector and therefore market-based or publicly-delivered mechanisms are needed.

3. RISK MANAGEMENT INSTRUMENTS IN AGRICULTURAL HOLDINGS

Farm risk management includes a choice of different mechanisms to mitigate the effects of risk. This choice usually requires an assessment of the trade-off between the changes in the level of risk, the expected returns, the entrepreneurial freedom and other variables. Some of the risk management strategies reduce the risk arising from the organization's activities; others transfer the risk outside the holding, while still others support the building of farmers' risk-taking capacity. Therefore, risk management on agricultural holdings does not necessarily involve risk avoidance; it rather requires finding the best combination of risk and return, accounting for people's potential to handle a certain degree of possible outcomes. Effective risk management involves anticipating possible outcomes and planning a strategy, taking into account the likelihood of events occurring and their possible consequences, rather than merely responding to events when they occur.

Depending on the moment of the risk response, the risk management strategies and decisions in agriculture can be grouped into two main varieties – preliminary strategies („Ex-Ante“) where the farmers' reaction takes place before the occurrence of potential adverse events and follow-on strategies („Ex-Post"). Three risk management solutions can be identified:

- 1) Risk reducing solutions and strategies (preventive action) that reduce the likelihood of adverse events occurring.
- 2) Risk mitigation solutions and strategies that aim to reduce the potential impact of an adverse event in case it occurs.
- 3) Strategies and solutions for coping, which aim to alleviate the impact of a risky event after it has occurred.

While the first two groups of risk prevention and risk mitigation strategies focus on incomes, coping strategies focus on consumption. Risk management strategies and decisions in agriculture are created on the basis of agreements reached at different institutional levels - at farm or community level, market-based mechanisms and government policy.

Depending on the nature of the strategies and decisions concerning risk management in agriculture, two main types can be distinguished: informal mechanisms and formal mechanisms. Using informal mechanisms, farmers look for an opportunity to avoid the risk on their own. These mechanisms are rather unofficial and the extent to which they will be used

depends on the individual propensity to risk of the individual farmer. Formal mechanisms are market-based or publicly delivered.

Table 1. Strategies and tools for risk management in agribusiness

| | Farm /holding, community/ level | Market-based | Publicly delivered |
|------------------------|--|---|--|
| Risk Reduction | <ul style="list-style-type: none"> • Avoiding exposure to risk; • Diversification of production; • Maintaining stocks of liquid assets; • Application of good agricultural practices. | <ul style="list-style-type: none"> • Risk Management Training | <ul style="list-style-type: none"> • Macroeconomic stability; • Insurance system; • Protection of property; • Extension services; • Supporting the supply of resources; • Plant protection control; • Infrastructure maintenance. |
| Risk Mitigation | <ul style="list-style-type: none"> • Sharing of production solutions; • Sharing of equipment, warehouses, inventory, irrigation systems, etc.; • Informal association. | <ul style="list-style-type: none"> • Vertical integration; • Market derivatives; • Contract farming; • Insurance. | <ul style="list-style-type: none"> • Tax Reliefs; • Subsidies; • Phytosanitary and veterinary border controls. |
| Risk Coping | <ul style="list-style-type: none"> • Reducing consumption; • Borrowing money from friends and neighbors; • Seasonal or permanent migration • Other employment; • Mutual assistance. | <ul style="list-style-type: none"> • Assets sale; • Diversification of income sources; • Savings and bank loans. | <ul style="list-style-type: none"> • Agricultural support programs; • Social support; • Restructuring and debt assumption; • Aids; • Assistance after disasters and catastrophes. |

Adapted from R. Holzmann and R.Jogersen [5], OECD [12], World Bank [7],

4. PUBLIC SUPPORT IN RISK MANAGEMENT IN AGRICULTURAL HOLDINGS IN THE EUROPEAN UNION AND BULGARIA

EU policy on risk management in agriculture has evolved over time at both national and community level. At national level, Member States are focusing on production risks arising from adverse climatic conditions and sanitary and phytosanitary conditions [13]. Different EU countries apply different approaches to risk management in agriculture, both in terms of scope and institutional implementation. At the current stage in the development of the EU's CAP, the policy structure has been fundamentally changed, with previous price support being transformed into direct payments to EU farmers. This has led to the "opening up" of markets to the impact of international prices, while CAP's Pillar I grant has provided a certain degree of income stability for farmers. Although not designed as an instrument for managing risk in agriculture, direct payments have an important role to play in addressing income fluctuations and protecting against production risk.

However, the system of direct payments will gradually be transformed. They are an expensive tool to achieve the CAP objectives, which increases the administrative burden on farmers. Subsidies are not evenly distributed among the individual producers and among the different

branches of agriculture. As far as direct payments support production factors, they rather lead to higher farmland prices and worsen the competitiveness and demographic structure of the sector. In some non-EU countries (US, Canada, Brazil, etc.) (OECD, 2009) [12], a variety of support mechanisms are used, focusing on controlling various risks in agribusiness. In other countries (Australia and New Zealand), subsidies are totally missing, and government support is provided for the sector's infrastructure.

Support for price risk involves farmers receiving payments when the market price of their produce in a given year falls by a certain percentage below a pre-established reference price. A major drawback of this support is the setting of the reference price, which may be very high or very low for the reference period. In addition, farmers become more indifferent to the price level. Another issue concerning this support is the reliability of the price data in Bulgaria.

The Revenue Risk Facility aims at helping farmers to protect farms in years of lower yields. When the revenue generated for the year differs by a certain percentage from the reference revenue, farmers receive payments based on the difference between the two figures. The disadvantage of this mechanism is that it increases the moral risk farmers: not to adhere to good production practices, to undertake reckless experiments, to make risky choices for agricultural crops, etc.

Insurance has an important place in managing farm risk from damages outside farmers' control. Subsidies for insurance policies are an appropriate mechanism for managing climate risk.

The Pillar II measures of the CAP also contribute to risk mitigation and provide support for agriculture. The measures are important for mitigating the impact of natural disasters and climatic risks, supporting the restructuring of the physical potential, promoting diversity, training farmers in risk reduction strategies, improving the health and living environment of people and farm animals. There are three risk management mechanisms in the EU's 2014-2020 Rural Development Programs:

- 1) Assistance in insurance premiums. A part of the insurance premium against economic damage suffered by farmers due to unfavourable climatic conditions, animal and plant diseases, pest spread, and environmental crises are subsidized.
- 2) Mutual funds. Farmers participate in contributions to a mutual fund that pays compensation for damage from adverse climatic events, illnesses or ecological crises.
- 3) Stabilization of income. This mechanism is new to the EU's CAP. It operates in the form of a mutual fund, the payments of which are related to farm income, including some market risks.

The most widely used mechanism within the EU is insurance subsidies. Mutual funds and income stabilization are used less often, and their costs are minimal. In Bulgaria, the risk management measure has been dropped in the last Rural Development Programme option and direct payments are the main income support mechanism. Farmers rely heavily on preventive risk reduction strategies, mainly through diversification of production and the application of good practices. Risk sharing is still at a low level. Harvest and animal insurance, although organized at a high level, is not yet widely implemented [10].

5. CONCLUSION

Farmers have many opportunities to reduce, mitigate or overcome risk, but choosing the right strategies depends mostly on the nature of the risk itself and the subjective attitude of farmers. Governments can also play an important role by creating conditions and supporting farmers, so that farmers can reasonably manage the risk in farming. The implementation of public support mechanisms raises a number of challenges, especially of a technical nature, requiring a lot of effort in this direction. Risk management support measures must be a complementary financial incentive for the development of science, technology, infrastructure, and the educational attainment of the agricultural labour force.

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RISK MANAGEMENT FOR FOOD SAFETY, CONSUMER HEALTH SECURITY

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Abstract: *Food production is seen as an aggregate system that is directly dependent on multiple subsystems that ensure each stage of this production with the goal of making safe food. Consumers require from organizations producing food to demonstrate objective evidence in regard to food safety management. Ensuring food safety, as the most important element of their quality, is necessary to be perceived as an essential part of all management activities. Food incidents or food intoxications caused by the use of unsafe foods provoke a serious public interest, as well as expectations to ensure the consumers' health.*

The purpose of this paper is to analyse existing food safety management mechanisms, to reveal opportunities for increasing food safety through risk management. Applying the science-based approach to risk assessment is one of the reasons to review the current concepts concerning food safety. The introduced HACCP principles are insufficient to cover all aspects of risks concerning food safety and the related health risks to consumers. The advantages and disadvantages, as results of the analysis of the current HACCP principles, can serve as a basis for introducing additional approaches to secure and control risks in food processing and marketing.

Keywords: *management; food safety; hazards, risk, risk management*

1. INTRODUCTION

Ensuring food safety is an activity governed by laws and regulations, and is seen as a joint responsibility of all stakeholders in the food chain. The establishment and maintenance of a food safety management system (FSMS) for food operators is regulated in the national legislation of the Republic of Bulgaria in line with European and global policies on safety of foodstuffs in accordance with Articles 12, 17 and 18 of the Food Act [2] and Ordinance No. 1 of 26.01.2016 on food hygiene [6].

Consumers are increasingly requiring from manufacturers to demonstrate and present objective evidence regarding food safety. Nowadays customer-vendor relations are customer-focused and a company operating in foodstuffs can prosper only if it satisfies to a maximum extent the customer's requirements. The upper hand in the customer-vendor relationship is held by customers, while manufacturers seek to reduce the incidence of dissatisfaction expressed by the end consumer or cases of recall of food products from the market because of health risks.

Recent years have seen the introduction of new technological practices for food production; the implementation of new automated systems in production equipment; advanced technical solutions for automation of registration of data obtained by monitoring the parameters of processes and products; the introduction of new methods of analysis and obtaining swift results,

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but despite all technological and innovative processes, food-related incidents have not decreased in number.

The emphasis in overseeing and ensuring food safety is on its traceability throughout the food chain and covers not only in theory but also in practice the development of effective measures related to the uniform approach in implementing various EU policies: agricultural, economic, social, educational, healthcare, etc., seen as a single regulated and monitored process by all EU countries at different levels: departmental, sectoral and national.

The beginning of the new century saw a disturbing trend of emergence of new diseases in animals and humans. In 2011, the epidemic in Germany caused by E.coli killed 53 people. Some known infectious agents which were thought to have been contained and placed under control caused severe epidemics and epizootic outbreaks – the highly pathogenic avian influenza in 2005-2006 (the epidemic covered dozens of countries in Asia, Africa and Europe). Between 2007 and 2014 the African swine fever spread to eight countries in Asia and Europe, including two Member States of the European Union: Lithuania and Poland. The actual situation and the growing number of notifications drove the European Food Safety Authority to express the opinion that new methodologies and tools to facilitate efficient and transparent sharing of data, knowledge and methods were needed in the field of risk identification among Member States concerning food safety [12].

The European Food Safety Authority carried out a pilot study on emerging risks in order to identify the reasons for such rapid evolution of some infectious agents [1]. These food-related scandals make an increasing number of consumers seek assurance for the quality and safety of food by manufacturers and require objective evidence of that.

The food industry in Bulgaria faces the challenge of producing and providing quality and safe foods. Companies in the food industry are increasingly striving to create and implement standardized food safety management and control systems. Food safety is of paramount importance for a company engaged in the manufacture and supply of food products, both in the national and the global market.

The goal of this paper is to make an analysis by comparing the existing mechanisms for the management of food safety through the HACCP concept introduced by laws and regulations to those developed under the requirements of internationally recognized standards in Bulgaria.

This goal is pursued by reviewing the existing food safety management systems (FSMS) implemented by operators engaged in storage of cereals, and proving the need to implement systems complying with the principles and methods laid down by international standards. Benefits from implementing FSMS as a factor for ensuring food safety and for the increased confidence of consumers in reduced health risk have been identified.

2. RISK MANAGEMENT FOR FOOD SAFETY IN THE CEREALS SECTOR

Cereals are the main raw materials for production of staple food and are present in the daily diet of a large target group of consumers – from children to consumers with dietary health problems. Among cereals, wheat is the major contributor to satisfying the nutritional needs of the population. Wheat is the main raw material for production of milled products, bread and bakery products, including animal feed. According to data published by the National Statistical

Institute [4], the consumption of bread and bakery products in Bulgaria in 2017 was 87.1 kg per capita.

It is critical to note that the reduction of the yields of cereals is related to climate change and the shortage of water. [9] In terms of agro climate, 2017 was characterized by periods of cold weather and severe waterlogging of the soil as a result of the melting snow and the heavy rains during the winter months, followed by excessive heat. The reported damage to crops was caused by frost/drought and white frost (due to the drought that took place in the autumn of 2016 or the lower temperatures in the winter and spring of 2017), storms, torrential rains accompanied by hurricane wind, flood, hail and drought. Despite the impact of these objective factors, in 2017 producers reported higher average yields of cereals compared to 2016, with the result that most of them saw an increase in production. The quantities produced are presented in Table 1 [8].

Table 1: Production of cereals from harvest 2016 and 2017

| <i>Crop</i> | <i>Harvested area (ha)</i> | | | <i>Average yield (ton/ha)</i> | | | <i>Production (ton)</i> | | |
|-------------|----------------------------|-------------|----------------------------|-------------------------------|-------------|----------------------------|-------------------------|-------------|----------------------------|
| | <i>2016</i> | <i>2017</i> | <i>Variation 2017/2016</i> | <i>2016</i> | <i>2017</i> | <i>Variation 2017/2016</i> | <i>2016</i> | <i>2017</i> | <i>Variation 2017/2016</i> |
| Wheat | 1,192,589 | 1,144,519 | -4.0% | 4.75 | 5.36 | 12.8% | 5,662,721 | 6,132,671 | 8.3% |

The wheat production in 2017 amounted to 6,132.7 thousand tons. This is 8.3% more than the previous year. For Bulgaria, the period 2017/18 was a record in wheat production, with over 6.1 million tons harvested. [3] This necessitated safe storage and handling measures as regards the harvested volumes of wheat, taking into account the objective climatic and vegetative disparities in the mentioned period. A very alarming trend has been observed, namely the use of agricultural crops (including wheat) for non-nutritional purposes, and there is a very significant problem associated with improper storage of cereals. We should also mention the problem of lack of knowledge about the transfer of pollutants during incompatible storage of different types of grains and oilseeds [9].

The above is a reason to require from operators engaged in storage of cereals, particularly wheat, to put in place adequate control measures in the FSMS for those steps of the technological process identified as critical to food safety. The availability of year-round supply of wheat and foodstuffs of plant origin requires the implementation of measures for management of the conditions of their storage. A variety of practices have been implemented in order to lengthen shelf life and assure the quality, such as treatment of cereals with pesticides against live pests.

The food market throughout the food chain has been characterized as an interconnected system with a wide variety of complex relationships. To handle these challenges, food business operators rely on standard systems for ensuring the safety of products and processes. Since all suppliers in the food chain are responsible for food safety, it is imperative to introduce safety systems at every step of the production chain and thereby demonstrate compliance with safety requirements [7].

At a time in which the alarm is raised that the food resources are limited, including depletion of arable land due to daily changes in climate, political or military action, we see increasing security concerns for food safety. Food safety can be achieved through the implementation of a series of measures planned by actions and rules of the documented procedures mostly oriented

towards mitigating the different types of hazards, thus reducing the risks associated with them. This is very often manifested in practice by reduction of microbial contamination of raw materials, reduction of the diseases in plants and animals, reduction of the concentration of accumulated chemical contaminants from the environment and plant health and veterinary measures, reduction of food losses and reduction of nutritional diseases.

The main strategic guidelines are aimed at providing the scientific basis for measures throughout the food supply chain and providing leadership and assistance in the development and strengthening of risk-based, integrated national systems for food safety [10].

Our survey conducted for the period 2013-2018 found that many Bulgarian companies engaged in the storage of cereals currently employ tools to manage the safety of stored cereals that do not go beyond the legal requirements, namely by implementing programs related to Good Hygiene Practices (GHP) and Good Manufacturing Practices (GMP), as well as a HACCP plan with the application of the 7 principles defined in the HACCP concept. The analysis outlines the possibility of comparison of modern food safety management systems with the requirements of internationally recognized standards and prevailing practical models for safety management as prescribed by the legislation. This comparison is made to indicate the weaknesses and strengths of these two systems, which pursue the same goal, namely ensuring the consumption of safe food, but in practice reach different results. Legislated FSMS are compared with those developed and implemented according to the requirements of internationally recognized standards, with the latter being a system which is verified by an independent certification organization [11]. On that basis, each company receives a certificate that proves the ongoing management of food safety in all processes from the creation to the marketing of their products/services to customers and partners. A management system cannot be a regulated product and therefore the certification of the quality assurance system is always a voluntary measure. The validity of the certificates is three years. After expiry of its validity, the certificate is renewed by recertification audit again conducted by an independent certification organization.

Based on the comparison, guidelines for the improvement of the respective system have been laid down, through the development and implementation of a certified food safety management system (presented in Table 2). The results of the comparative analysis give grounds to assert that companies need to *implement mechanisms* for strategic and tactical management of food safety. This improves the *internal structure and the interaction with the factors of the external environment* in the long term. Otherwise, the discrepancies will deepen and the established practice of safety management for cereals will increasingly move away from the growing demands of consumers, who expect to consume food that is safe for their health.

Table 2: Comparison between modern food safety management systems and applied models of safety management as required by the legislation in the Republic of Bulgaria

| <i>Modern food safety management systems (FSMS) under the requirements of internationally recognized standards in the cereals sector</i> | <i>Food safety management systems (FSMS) under the requirements of laws and regulations in the cereals sector</i> |
|--|--|
| At the level of strategic and tactical management of food safety | |
| Mechanisms have been developed for strategic and tactical management of safety. Within the strategic management, basic guidelines and objectives are set in the long | Lack of competently prepared strategies, technology projects and business plans for the companies, in accordance with regulatory requirements. |

| <p><i>Modern food safety management systems (FSMS) under the requirements of internationally recognized standards in the cereals sector</i></p> | <p><i>Food safety management systems (FSMS) under the requirements of laws and regulations in the cereals sector</i></p> |
|--|---|
| <p>term, and then strategies are developed to achieve the objectives by defining a Safety Policy. Policies are then announced and the personnel are urged to get familiar with them.</p> <p>The parameters of the strategies are formulated in strategic plans and measurable objectives related to reduction or mitigation of hazards with a view to ensure food safety. Ensuring the integration of food safety requirements in the business processes of the organization. Safety management is conducted by applying the process approach with provision of resources. The senior executives demonstrate the continuous improvement of FSMS by applying a leadership approach.</p> <p>Determining the context of the organization, by defining the extent of the impact of external and internal factors related to food safety. At the strategic level, this influence is regularly reviewed and the information related to the dynamics of these external and internal circumstances is updated.</p> <p>Effective exchange of information with stakeholders in the food chain about issues related to food safety.</p> <p>Identification of the needs and expectations of stakeholders with applicable statutory, regulatory and customer requirements in terms of food safety, and establishing mechanisms to respond to these requirements. This information is then reviewed and updated by the HACCP team and the senior executives in order to achieve the objectives and ensure food safety.</p> <p>A safety team is formed with clearly defined responsibilities and powers, and the necessary qualifications and competence. A team of specialists in the sector.</p> <p>Clearly defined responsibilities and powers of all employees with regard to safety, and reporting upon detection of deviations of the set parameters for the purpose of</p> | <p>The goal is compliance with the minimum regulatory requirements regarding the safety of stored cereals.</p> <p>Existence of many small companies with poor production resources (agricultural cooperatives or warehouses of farmers).</p> <p>Lack of sufficient financial resources to develop FSMS that exceed regulatory requirements.</p> <p>Lack of competent personnel for the preparation of documented rules relating to the application of the safety principles set by the HACCP concept.</p> <p>The impact of external and internal factors related to food safety is not documented and taken into account.</p> <p>Only what is required by the regulatory provisions is taken into account, but not the requirements of stakeholders.</p> <p>Lack of proper identification of the responsibilities and powers of the safety team leader, including their qualifications and competence regarding cereals-related risks for the health of consumers. The team is only identified on paper.</p> <p>There is no adequate training and competence-raising for the food safety team, the latter exists only "on paper" so as to meet the requirements.</p> <p>Lack of sufficiently qualified personnel and professionals in companies, with respect to the implementation of best practices in the supply and subsequent storage of cereals.</p> <p>The risk is limited to the assessment of hazards in the technological process and the determined critical control points (CCP).</p> <p>Processes are not identified; only programs for management of the self-control system are introduced (GHP and GMP) and HACCP plan for the product.</p> |

| <p><i>Modern food safety management systems (FSMS) under the requirements of internationally recognized standards in the cereals sector</i></p> | <p><i>Food safety management systems (FSMS) under the requirements of laws and regulations in the cereals sector</i></p> |
|--|---|
| <p>identification of hazard or risk related to safety.</p> <p>Thinking based on risks and opportunities associated with events and their consequences related to the efficiency and effectiveness of the FSMS.</p> <p>Identification of risks related to public health. Actions planned to address these risks and possible outbreaks, rules governing actions in the production process concerning product safety. Action planning to address the risks and use opportunities to avoid risk and risk-taking, to remove the source of risk, change the probability or consequences, share the risk or accept the risk through informed choice.</p> <p>Adequate response in case of changes related to the functioning of FSMS processes, dangers, statutory requirements or the requirements of stakeholders.</p> <p>Opportunities to be identified can constitute the basis for improvement by adoption of new practices – use of new technologies, modification of products or processes, introduction of new practices to control hazards, fulfilment of the requirements related to food safety.</p> <p>Defining the rules for communication with external stakeholders and the rules within the organization (vertical and horizontal).</p> <p>Planning of measures for the effective control of processes and products – planning internal audits, audits by a second party, and certification audits by a third party.</p> | <p>Lack of technical or technological documentation guaranteeing the production processes of the company.</p> <p>The working teams of cereals facilities are with insufficient staffing and inadequate qualification in terms of understanding the different hazards.</p> <p>Inadequate actions in case of changes related to regulatory requirements or customer-specific requirements related to product safety.</p> <p>Lowered and insufficient control of the incoming supply of cereals (in terms of impurities, contamination, moisture, etc.).</p> <p>Poor control by the competent authorities concerning the frequency and thoroughness of inspections.</p> <p>Lack of basic technological equipment.</p> <p>Inadequate care by managers regarding the health of the personnel with the participation of Occupational Health Services (OHS).</p> <p>The experience gained in the field of grain storage is a prerequisite for availability of ready solutions in case of discrepancies relating to the rules of storage and its parameters in order to protect products from phytopathogenic diseases.</p> <p>The HACCP system covers only the dangers in the stages of the technological process with a focus on defining control measures in the analysis of any threat aimed at its reduction or elimination. The steps of the technological process are evaluated with the tool known as "Decision Tree", which leads to the determination of steps specifically designed to eliminate a hazard or reduce it to an acceptable level.</p> |
| <p>At the level of operational safety management</p> | |
| <p>In operational terms, there are three main subsystems for food safety management</p> <ul style="list-style-type: none"> • Subsystem for interaction with the external environment. The purpose of this | <p>Within the scope of FSMS, the requirements for the infrastructure in terms of the current conditions of the manufacturing site are interpreted.</p> |

| <i>Modern food safety management systems (FSMS) under the requirements of internationally recognized standards in the cereals sector</i> | <i>Food safety management systems (FSMS) under the requirements of laws and regulations in the cereals sector</i> |
|---|---|
| <p>subsystem is the most comprehensive interaction with factors relevant to the requirements of stakeholders to safety, Management of processes related to the maintenance of infrastructure, personnel and working environment.</p> <ul style="list-style-type: none"> • Subsystem for planning and control of safety. The main feature is that in the planning and control responsibilities and powers are distributed horizontally, i.e. to the immediate executors of the operation and with a clear definition of these responsibilities in the documented rules of FSMS. • Subsystem for continuous optimization of safety: it is regarded as a dynamic value. At the linear level, mechanisms are developed to improve safety management, participation of members of the HACCP team (periodic review of the risks for specific products and the adequacy of control measures in respect of such risks). <p>Establish, maintain and continuously update FSMS by using externally developed elements of prerequisite programs, hazard analysis and the plan to control hazards.</p> <p>FSMS is specially adapted to the processes and products of the organization by the appropriately qualified food safety team.</p> <p>Trainings related to food safety in case of emergency, force majeure, including simulation of measures adopted for the management of safety risks.</p> | <p>Batches of cereals which are very small in volume and heterogeneous in quality in terms of microbiological and chemical purity.</p> <p>Reduced control of hygiene and cleaning of transport facilities in receiving deliveries of cereals, including warehouse capacities.</p> <p>Improper personnel behaviour at work.</p> <p>Unsuitable buildings and production facilities intended for acceptance and subsequent storage of cereals.</p> <p>The FSMS put in place: contains rules for prerequisite program that hardly vary due to changes in the environment, the system is only updated upon instructions by the supervisory authority. The HACCP system is based on the principle Good practices for the sector, and in most cases it covers universal, not specific rules for a particular company.</p> <p>Incoming control is performed visually, with the exception of organizations with own laboratories for physico-chemical analysis. It can be assumed that the deliveries may contain real hazards.</p> <p>Insufficient measures and actions regarding deratisation and disinfestation of infrastructure and products.</p> <p>Treating cereals with fumigants upon detection of live pests. In most cases, the prevalence of live pests is increased many times and requires the use of high concentrations of chemicals for treatment. This in turn causes increased chemical residues in the grain mass;</p> <p>Not uncommonly, the documented HACCP system requires the use of external licensed pest control company, but in practice only internal measures are applied by the employees themselves to address emerging problems with pests.</p> <p>Intersection of the traffic flows of raw material, finished product, personnel and waste.</p> |

| <i>Modern food safety management systems (FSMS) under the requirements of internationally recognized standards in the cereals sector</i> | <i>Food safety management systems (FSMS) under the requirements of laws and regulations in the cereals sector</i> |
|--|---|
| | <p>Lack of sufficient storage space for control of storage parameters.</p> <p>Lack of sufficient storage space for separate storage of heterogeneous batches.</p> <p>Low level of personal hygiene of the personnel.</p> <p>The HACCP team does not review the recorded parameters specified in the CCP, when a trend is noticed for them to go beyond of the specified limits.</p> |

3. CONSLUSIONS

The following conclusions can be drawn: the existing traditional systems based only on legislation show a lack of long-term management perspective, i.e. there is virtually no strategic and tactical management. Food safety management is not subject to specific targets for improvement of the organization; instead, it is oriented towards removing negative aspects or discrepancies identified during inspections. Thus the decisions on change management are very often vague and inadequate. All this leads to a fear of change and passivity. As a result, this type of management has little chance of development, i.e. it maintains the existing production levels with no prospect of large-scale expansion and market positioning and last but not least, the safety of the products sold remains is still regarded with suspicion by consumers.

Certified FSMS and the implementation of risk management measures create the basis for increased efficiency of the system and thus ensure the achievement of better results and prevention of negative consequences. On this basis, priorities are set to ensure the safe storage and market placement of cereals.

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PRODUCER PRICE RISK IN BULGARIAN AGRICULTURE

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Abstract: *The objective of this paper is to compare the levels of price risk faced by producers of basic unprocessed agricultural products in Bulgaria based on certain theoretical assumptions. The research covers the period 2009 – 2017. The risk levels have been measured by using the “coefficient of variation” and “lower partial moment” indicators.*

Keywords: *Producer price, risk, agriculture*

1. INTRODUCTION

The liberalization of trade and the dynamic competitive environment have resulted in Bulgarian farmers facing the challenge to operate under conditions of uncertainty and risk. Price volatility is a typical phenomenon in agriculture because of the impact of a number of economic, natural and political factors. Unexpected price changes result in uncertainty regarding the financial return on the funds invested and affect the overall well-being of farmers. This makes the issue about the assessment of price risk in agriculture particularly important. The objective of this paper is to compare the levels of price risk faced by producers of basic unprocessed agricultural products in Bulgaria based on certain theoretical assumptions. The research covers the period 2009 – 2017.

2. THEORETICAL FRAMEWORK

The concept of price risk in agriculture is usually associated with the uncertainty with respect to the prices of agricultural produce and the likelihood of an unfavourable and unexpected result or loss for the farmers [1]. This concept implicitly covers the following characteristics of price risk in agriculture with respect to its measurement: *First*, farmers take their decisions to invest in the production of certain products based on their expectations regarding the producer’s price levels that will be established on the market at the time when the products will be sold. The price risk is associated with the likelihood of any discrepancy between the actual and the expected result. *Second*, price risk is associated with the likelihood of an *unfavourable* change in the price levels. Farmers evaluate the price as either “favourable” or “unfavourable” based on comparing its actual level with their preliminary assumption. This means that in order to measure the level of price risk, it is important to be aware of the benchmark used by the farmers for comparison in order to evaluate the price as “expected” or “unexpected” and as a “favourable” or “unfavourable”. Researchers who identify price risk based on price volatility assume that farmers set their expectations based on the average prices established over a certain period [2]. In addition, some authors [3] have proven that investors from certain groups determine the success of their investment decisions based on a comparison of the price established on the market with more than one variable. Depending on the cultural and historical characteristics of farmers, the technological progress and the agricultural policy that is currently in force, the variables used by producers for comparison may vary. For instance, Champika

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(2016) [4] established that farmers in some communities formulate their expectations regarding prices and take decisions on the type of products to produce based on the price during the previous year, the costs for production, the resilience of the crop to climate changes, the influence of their colleagues and past experience. Capitani and Mattos (2017) [5] discuss that the expectations of farmers are influenced by the costs for production and by the minimum prices established by the government.

3. METHODOLOGY OF THE STUDY

The study on the price risk for producers of unprocessed agricultural products in Bulgaria has undergone two key stages.

During the first stage, the following assumptions have been made: First, farmers consider any deviations above the average price during a certain period and any deviations below its level as equally undesirable; second, farmers concentrate on the average value of the prices during the examined period as a benchmark for evaluation of the price as “expected”/“unexpected” and “favourable”/“unfavourable”. Perceiving any eventual deviation of the prices above the average price as unfavourable is reasonable from the perspective of those farmers, who, motivated by the expectation about low prices, have chosen to invest in other agricultural crops. This means that they will face lost profits because of the establishment of prices above the average level. Based on these two assumptions, it is considered that the level of price risk can successfully be measured by using the “coefficient of variation” indicator of the studied dynamic series of prices based on formulas (1).

$$V_{\sigma\%} = \frac{\sigma}{\bar{p}} \cdot 100 \quad (1)$$

where:

$V_{\sigma\%}$ - coefficient of variation.

\bar{p} - average price level during the studied period

σ – standard deviation calculated based on formula (2)

$$\sigma = \sqrt{\frac{\sum_{i=1}^n (p_i - \bar{p})^2}{n}} \quad (2)$$

where:

p_i - price level at the moment i

n – number of price levels studied

The “coefficient of variation” indicator is useful for achieving comparability of the dispersion of prices of the studied products. A relatively low coefficient of variation means that the prices are grouped very closely to one and the same price (the average price) and therefore the price risk is relatively low. If this indicator is high, this means that there are great deviations from the average price and, consequently – high level of price risk.

The second stage of the analysis is based on the assumption that farmers perceive price risk as a deviation below a certain benchmark, particularly – the average price level for the producer during the previous year. In order to address the study to the left part of the dispersion of price levels, which includes negative returns or losses from price changes, the lower partial moment (LPM) indicator has been used. LPM only accounts for deviations below a certain threshold, which constitutes failure to meet a certain expectation regarding the price levels. This indicator is calculated based on the following formula:

$$\text{LPM}\alpha(r; B) = \int_{-\infty}^B (r - B)^\alpha dF(r) \quad (3)$$

where:

r - series of returns;

B - the potential return at the average value of the product price during the previous year (the year preceding the return generated)

$F(r)$ - the cumulative function of dispersion.

α - level of LPM

One of the possible criteria for selection of the LPM power (α) is the level of the investor's tolerance to risk. A number of studies [6], [7] provide empirical evidence that farmers are generally risk-averse. The specialized literature [8] recommends risk-averse investors to raise the deviation from the benchmark ($r - B$) to the second power ($\alpha=2$) when calculating this indicator. In this report we assume that most farmers in Bulgaria are risk-averse and adopt the commented criterion for selection of the power (α).

Quarterly data about producers' prices for the period 2009 – 2017 and information about the average yearly producers' prices during the period 2010 – 2016 have been used. The data were obtained from the official database of the National Statistical Institute.

4. SELECTION OF PRODUCTS FOR THE IMPLEMENTATION OF THE STUDY

The criterion for selection of unprocessed agricultural products for implementation of the study on the price risk in the Republic of Bulgaria is their contribution to the formation of the value of the final products in the agricultural sector. Table 1 presents the unprocessed products with the greatest contribution in the formation of the value of the final products in the agricultural sector during the study period.

Table 1: Agricultural products with greatest contribution in the formation of the final products in the agricultural sector in Republic of Bulgaria in base prices, 2009-2017.

| <i>Products</i> | <i>Average yearly value (million BGN)</i> | <i>Relative share in the products from the agricultural sector in 2017 (%)</i> |
|-----------------|---|--|
| Soft wheat | 1325 | 18.7 |
| Sunflower | 1041 | 14.1 |
| Milk | 773 | 8.3 |
| Grain | 632 | 8.1 |
| Poultry | 345 | 3.6 |
| Pigs | 287 | 3.6 |

Source: own calculations based on data from NSI, Bulgaria

The value of the products presented in *table 1* constitutes more than 56% of the value of the final products from the agricultural sector in 2017. Sunflower, wheat, corn and poultry have been the top products exported from Bulgaria over the past few years [9]. Based on these data, the analysis of price risk in agriculture in Republic of Bulgaria focuses primarily on the prices of producers of soft wheat; corn; sunflower seeds; pigs; poultry, broilers up to 6 months old (the manufacturing of chicken meat is of significant importance for the industrial production of poultry in Bulgaria [9]) and raw cow's milk (most of the animal milk produced in Bulgaria is cow's milk - 89.2% in 2015 [9]). This report has analyzed the price risk related to the market sale of other agricultural products in order to obtain a more precise comparative evaluation.

5. RESULTS

The price risk, analyzed as the level of volatility of prices above and below the average price for the period during each individual quarter (fig 1), is relatively high for the analyzed products of the plant breeding sector, i.e. wheat, corn and sunflower. The highest level of risk among these three crops has been observed in sunflower. The risk associated with the sale of raw cow's milk exceeds the risk for most animal products, with the exception of pigs weighing up to 20 kg. The remaining animal products have manifested relatively low risk levels, with the price risk for broilers exceeding the one associated with pigs weighing between 20 and 50 kg and pigs weighing between 80 and 110 kg.

Figure 1: Coefficient of variation (%) and lower partial moment of quarterly producers' prices, 2009 – 2017.

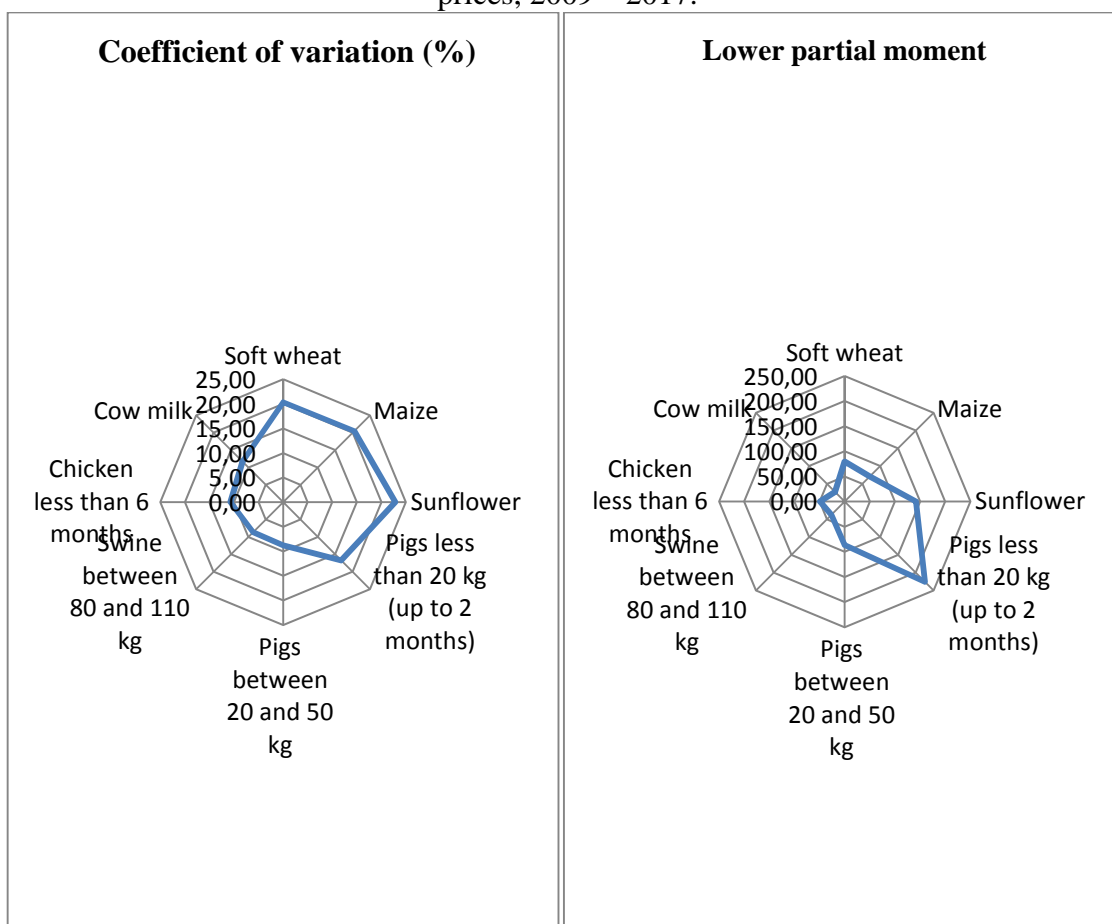
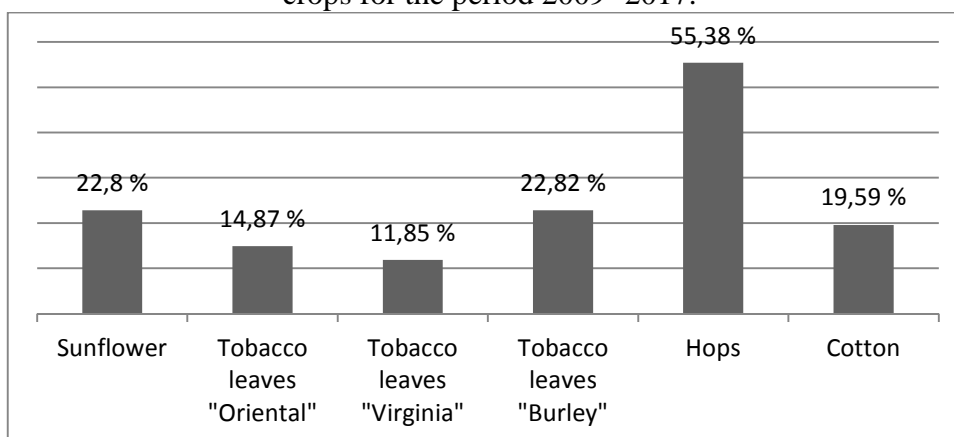


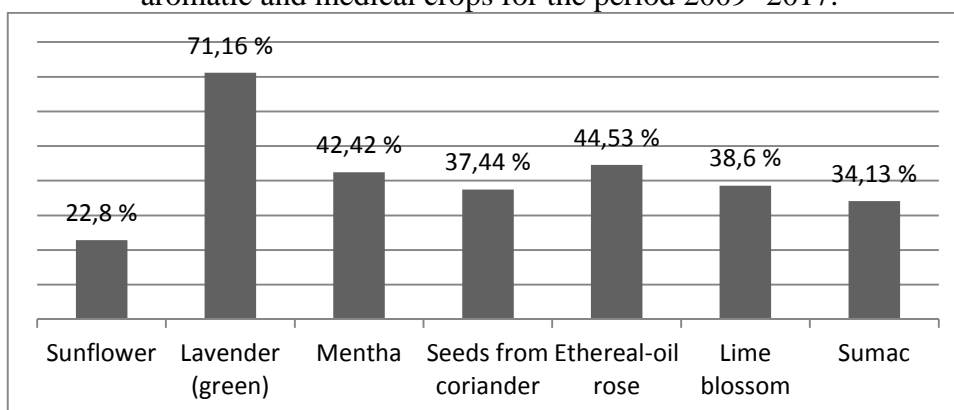
Fig. 1 presents the results from studying the levels of price risk based on the two indicators – coefficient of variation and lower partial moment (LPM) for price variability below previous years' prices based on producers' quarterly prices.

Figure 2: Coefficient of variation of the prices of producers of primary industrial and fiber crops for the period 2009 -2017.



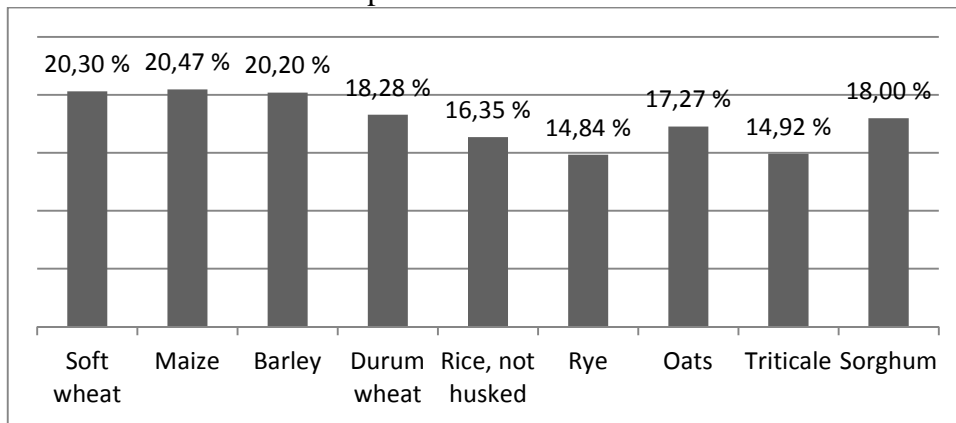
There is higher variation in the prices of sunflower (and, respectively, the price risk is higher), as compared to the value of this indicator for primary industrial crops and technical fibre plants (oriental tobacco, “Virginia” tobacco and cotton) and lower as compared to the same indicator for hops (fig.2). The risk associated with the production and sale of sunflower is lower than the one associated with the primary aromatic and medical crops grown on the territory of Republic of Bulgaria (fig. 3)

Figure 3: Coefficient of variation of the prices of producers of sunflower and primary aromatic and medical crops for the period 2009 -2017.



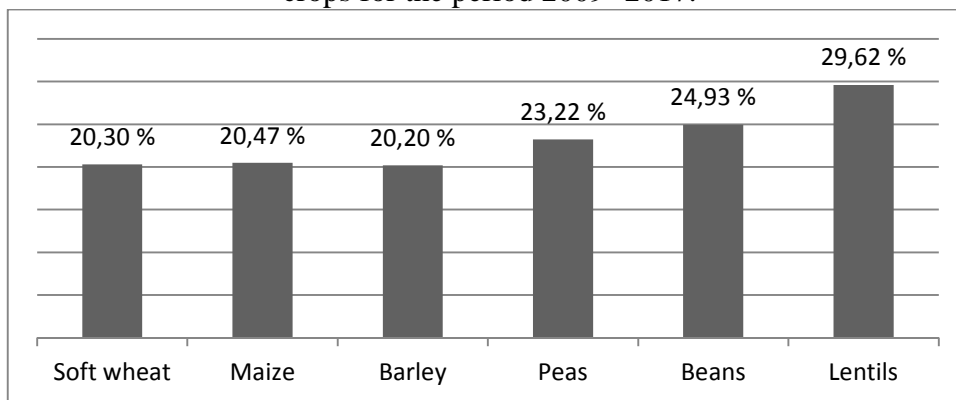
The marketing of grains and wheat crops that contribute less to the formation of the value of the final products in agriculture (such as durum wheat, rye, oats, husked rice and tritcale and sorghum grains) is associated with lower price risk as compared to the production of soft wheat and corn grains (fig. 4).

Figure 4: Coefficient of variation of the prices of producers of some cereals crops for the period 2009 -2017.



The primary grain and legume crops produced on the territory of Bulgaria (such as beans, peas and lens) bear higher risk as compared to the grains and wheat crops (fig.4 and fig.5).

Figure 5: Coefficient of variation of the prices of producers of some cereals and industrial crops for the period 2009 -2017.



The other price risk indicator – LPM, which in this report measures the likelihood that the market price will settle below the average price during the previous year, shows different results. The risk of unfavourable changes in the prices of sunflower identified and measured in this way is also relatively high, however, the risk level is higher for the production of younger pigs weighing up to 20 kg (fig. 1). The level of risk associated with animal products from pigs weighing up to 50 kg is higher than the risk levels associated with the prices of wheat and corn (fig.1). The price risk associated with pigs weighing between 80 and 110 kg and chicken is also relatively low based on this indicator and is similar to the results from the measurement of risk by using the coefficient of variation. Among the studied products that contribute most to the formation of the value of the final agricultural products, the lowest risk level observed, measured as the likelihood of deviation of the price below the average market price from the previous year, is the one associated with cow’s milk.

6. CONCLUSION

The products that have the highest contribution to the formation of the value of the final products from the agricultural sector in Republic of Bulgaria are wheat, corn, sunflower, pigs, broiler chickens and cow’s milk. Based on the price volatility indicator, the price risk is relatively higher with respect to sunflower, wheat, corn and pigs weighing up to 20 kg and

relatively low with respect to cow's milk, broilers, pigs weighing between 20 and 50 kg and pigs weighing between 80 and 100 kg. In contrast to this conclusion, the results from measuring risk as the likelihood of settlement of a lower price than the average producer's price reported during the previous year indicate that corn producers face a relatively lower price risk, whereas the risk of unfavourable changes in the prices of pigs from the lowest age group is relatively high. The risk assessment depends on the assumptions of the researchers regarding the method, in which farmers set their expectations about the price level and the benchmark used for comparison by the farmers in order to identify the price as a "favourable" or "unfavourable". Therefore, the assessment of the price risk levels should take place based on a combination of indicators.

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SOME CONSIDERATIONS UPON WATER STRESS: ITS TRIGGERS AND CONSEQUENCES

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Abstract: *We live in a water-stressed world. This paper intends to signal some of the main peculiarities of this situation, which are their causes and the possible effects. Rising population number coupled with urbanization, industrialization, food and modern agriculture practices, energy production and use, are all demanding access to an already stressed and polluted resource. Furthermore, dams, as expression of last hundred years' concrete revolution, could complicate even more the political relations among riparian states sharing a river, promoting a new type of water-nationalism with very complex consequences. And we must be aware that an unsustainable management and use of water could strongly hurt us back, with negative consequences for all.*

Keywords: *Dams, energy, food, mass migration, water, water stress*

OVERVIEW

Quiet as it is, water has some unique qualities: it is – together with the air – the most important resource on Earth. Even it doesn't make headlines water directly influences stability and security, human and animal health, economic development, and the environment sustainability. The water stress is less visible as we hardly note the depletion of aquifers (both deep/fossil and shallow), but it is more visible when looking at rivers, which have registered decreased flows, to the limit of their full dryness, doubled with lakes' disappearance. *Since over-pumping of aquifers and rivers is a common fate in all populous countries, hitting the bottom line of those aquifers – with the food shortages connected to it – could come roughly at the same time.* And food scarcity there creates hard time not only for governments of those countries, but for the whole world.

There is a high probability to encounter hard times in real life brought by such a crisis-scenario because of water-stress in not a too distant future; numbers speak for themselves: the available average per capita of freshwater resources at global level was 9000 tons (1988), it was 6079 tons (2012), while the projections for 2015 pointed to only 5000 tons [1]. It is crucial to mention that in case freshwater availability is under the 2000 cubic meters (c.m.)/person/year, a serious disincentive upon economic activity's rapid development is the direct consequence, hurting the environmental sustainability, too; furthermore, when water availability is under 1000 c.m./year/capita – the international recognized water poverty verge [2] – the constraints on economic and social activities are extreme.

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Being both a regional, and a global problem, growing water shortages across much of the world brings challenges in security and socioeconomic areas. Water stress, hit when yearly water availability per person is lower than 1700 c.m., [3] poses great menaces to a well-functioning economy, stretching it to the limits.

Reduced water availability is due both to economic-social factors such as growing population, industrialization, urbanization, modernizing agriculture, moving up the food chain for a large number of people, but it has to do with poor water management practices regarding water distribution, use, and recycling.

A strong proof there is a pending water crisis, given by the focus of reputed research centers on the subject; “What is now a global water challenge will soon become a global water crisis,” recalled CSIS; while other informed research centers from US (CFR), London (IISS and RIIA), Paris (IFRI), or Moscow (IMEMO), are all overseeing this water problem and its security implications.

TRIGGERS OF POTENTIAL WATER CONFLICTS

Agriculture and food

The main consumer of freshwater resources is agriculture: at global level, 70% of water goes to irrigations and animal husbandry [4], creating enormous harm to environment. One lower profile and hard to note consequence of Green Revolution has to do with water: since 1950s, this revolution – thought to bring relief for the hungry particularly in developing nations such as China and India – has removed drought-resistant *local crop sorts*, replacing them with water-guzzling crops, thought to produce higher yield. But the ecological and social costs were largely ignored [5]. Until Green Revolution local water resources were used in a protective way, resorting to indigenous traditional irrigation technologies, but this revolution has triggered oil engines and electric pumps’ use, which extracted water in a completely unsustainable manner, coupled with large dams’ construction, which have hindered normal flow of great rivers.

Adding more to this unwise water use, the high-yield crops need chemical fertilizers and herbicides, harming the organic character of soil through erosion. Soil is the biggest water reservoir humankind has, and reducing organic matter in soil determines a reduced capacity to hold moisture. The volume of water retained in soils is connected to soil organic matter, 0,5% organic matter soil retains 80 c.m. of water/hectare, while 4% organic matter means 640000 liters/hectare. Chemical fertilizers, destroying living process in the soil, make it more vulnerable to droughts and this is coupled with the production of nitrogen oxygen, a greenhouse gas which is more potent than carbon dioxide. And biodiversity and soils are the most potent carbon dioxide sinks.

Food industry centered on animal protein is another water guzzler. In every society where income has risen, the demand for meat followed suit; today some 3 billion people are moving up the food chain. World meat consumption went from close to 50 million tons (1950) to 280 million tons (2010), while the yearly per capita consumption climbed from 17 kg to 40 kg [6]. As there is needed a quantity of 2400 liters of water to produce just *one* standard hamburger patty [7] – because of all water required to grow cereals for the animals – moving up to food chain as new developed countries emerge puts more and more pressure on water resources; contrary, there are needed some 1000-1500 liters of water to produce one kilogram of cereals, some 10 times less than water needed for the equivalent quantity of beef [8]. A diet with more

vegetarian component – beyond creating conditions for a better health – could bring some relief related to the pressure put on scarce water resources.

Another trigger of future water stress and competition is related to a scenario where cities are pitted against villages. Striking examples of competition between cities and farms can be found in the US; the depletion of aquifers in leading irrigation states such as California – the irrigation leader – as well as the diversion of water to megalopolises have reduced irrigated area from close to 3,7 million hectares (1997) to 3,2 million hectares (2007), while in Texas the irrigated area decreased from 2,84 million hectares (1978) to 2 million in 2007, as the thin southern end of Ogallala aquifer was depleted [9].

As states' policies and especially corporations, favor industry and city development over village and traditional way of living, the pressure to “redirect” water from village and orient it to the cities is so great that the village has little to do, but to comply. Economic output rising based on development of industrial and tertiary sectors determines water to head to the higher bidder, which of course is the city, in a world where each year are added some 70 million more people [10]. Domestic water conflicts are in the focus of domestic politics, farmers being on the losing side in most cases; political leaders are preoccupied with an expanding economy, using industry and services concentrated in cities, and unemployment rate's lowering, and because there are needed over 1000 c.m. of water to produce a ton of grain, while it takes some 15 c.m. of water to produce 1 ton of steel, for example, it can be easily observed that the village is on the losing side.

But who can honestly argue which is more important in case of a water shock and food crises, the city with its high concentrated and intense economic activity or the farm which could feed farmers, cities, and even other societies in the importing countries? This is yet another face of water as a conflict trigger, pitting against each other peculiar interests at local, regional, state levels, as well as at the international level.

Agriculture and transport

Ethanol and biodiesel are quite new ingredients of propulsion in transportation and they strongly compete with the food production for land and water resources. Starting with the 70s, in some European countries, in the USA and Brazil took roots the idea of cultivating crops to produce fuel [11]. The pressure put by industries connected to bio-fuels on the limited agricultural land area and on the fast reducing water resources face-to-face with food production is so great, that food prices have steadily raised in last decade. Of course global population's rising coupled with higher incomes in developing countries is a determinant for such a trend, but the competition between “feeding” the car of the wealthy and allocating food for those with lower chances marks its weight on global food price. Furthermore to produce 1 liter of biodiesel there is needed 16.45 liters of water [12]; bio-fuel is 3 to 5 times more water intensive than traditional fuels [13].

Furthermore, moving one calorie of food needs four calories, consumed in transport [14].

Energy sector

It competes for water resources too. Resources such as coal, oil, natural gas, or uranium cannot be geared for energy production without using great amounts of water. The energy sector is the largest water consumer in Europe and the US [15]. Petrol refineries consume usually larger quantity of water related to the quantity of gasoline or diesel they output. Furthermore, the extraction of hydrocarbons from tight stones underground means losing huge amounts of water

due to “stimulation”. Pointing directly to electricity generation, it takes about 87 liters of water to produce 1kW/h electricity to provide the conditions for running an energy-efficient refrigerator for one day. The cooling and steam-cycle processes at thermoelectric power plants that receive heat from sources as coal, gas, oil, nuclear, biomass, concentrated solar energy, geothermal energy takes their share in water guzzling.

Dams and imagined geography

When there is taken a decision to build a dam we are working with imagined geography; it is hard to grasp all consequences of dam’s construction, with all their ramifications. Costs involved, needed time, river flowing regime, how forced-removed communities will adapt, how river fragmentation due to impoundment creates spill-over effects in aquatic life, environment and evaporation regime, are few elements which can differ a lot between the moment of project imagination and its behavior in real environment, after its completion.

Furthermore, dams can be employed as political weapons due to their capacity to store or release water to other lower co-riparian states; this could trigger intensified tensions, especially when there is a period marked by severe drought in the river’s basin area.

As one public presented reason behind the decision to build a dam could be flood prevention, imagined geography could have nothing to do with that reality; there were cases when during heavy rains a decision to relinquish water from a dam was taken, in order to prevent its burst. When they are needed most, dams aimed at promoting flood prevention, could end up creating floods. Dams becomes more contentious matters when he, who controls the headwater through these concrete structures releases water, destroying fields and food, settlements, infrastructure, and as a consequence the economy and society of lower riparian states.

Water is very hard to be transported over long distances, and it could be locally or regionally “manipulated”. As a consequence, relocation of people is a given in case their access to water could not anymore be secured. The reason behind regional upheavals connected to water stress is due to the fact that water cannot be imported, like other commodities. As a consequence, there are big incentives to create instruments to commandeer *internationally shared waters, especially when they are on national territory*. The result is the focus on massive scale hydro-engineering projects (irrigation schemes and especially *dams*) in upper-riparian states, without much care about downstream societies. These large infrastructures regulate the trans-boundary flow of a vital resource, fashioning *water* in an instrument with powerful diplomatic clout and strong political leverage.

There are 276 international river and lake basins in the world, yet only 18 are covered by a mutually binding water-sharing agreement [16]. And what is even more important, as in 2005, there was no one international river or lake basin covered by a powerful regime comprising all nations with interests in that resource [17]!

Hydro-hegemony is a policy pursued quietly, but actively by two international actors with regional, respectively global influence: Turkey and China. Using *dams* and *water transfer schemes* China can influence and even control in some way, the fate for nearly half of world population [18], and on a continent already torn by low water availability. As China is home of some half of world’s great dams, and because Beijing has no visible intention to stop its course regarding water control [19], this can bring tensions and even open rivalries with other riparian countries.

The other strong player on hydro-hegemony arena is Turkey; it claims *absolute* rights over water coming from its territory, without taking seriously into account Syria's and Iraq's rights over Tigris and Euphrates' waters, and to put it in practice, it had launched an ambitious project aiming at building dams and irrigations schemes in its Eastern and South-Eastern regions.

We can note that power relation among co-riparian influences such an outcome. Both are examples fitting this power equation; this could create the potential for a latent revenge from those disadvantaged, with hard to imagine results.

We need just to look carefully around us and all that was here shortly presented becomes visible, but that would not be enough. There is needed a greater awareness from the part of those who have the noble mission to educate others. The changing attitude regarding our very precious "blue gold" should be one of the main focal points for all of us on short term, while *reconciling* mankind with its environment should become the central ethics of future leaders.

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VIŠINA KAZNI PROMETNIH PREKRŠKOV ZARADI PREVELIKE HITROSTI OZ. ALKOHOLIZIRANOSTI V PRIMERJAVI S POVPREČNO PLAČO V SLOVENIJI IN SRBIJI

FINE RATES FOR SPEEDING AND DRINK-DRIVING TRAFFIC OFFENCES COMPARED TO THE AVERAGE SALARY IN SLOVENIA AND SERBIA

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Povzetek: V prispevku se avtor ukvarja s primerjavo denarnih kazni za prometne prekrške, vezane na prehitro vožnjo in vožnjo pod vplivom alkohola v Sloveniji in Srbiji. Pri tem so ga zanimale realne denarne kazni, ki so vezane na življenjski standard prebivalcev teh dveh držav. Ker imata državi omejitve hitrosti in stopnje alkoholiziranosti nekoliko različne, je avtor posamezne intervale omejitev poenotil tako, da so bili med seboj primerljivi. Analiza raziskave pridobljenih podatkov je pokazala, da so denarne kazni za prehitro vožnjo v naselju in izven naselja realno precej višje v Sloveniji, na cestah za motorna vozila in avtocestah pa so le-te višje v Srbiji. V Srbiji so denarne kazni višje tudi pri vseh ekstremnih prekoračitvah hitrosti, ne glede na vrsto ceste. Tudi pri prekrških, vezanih na vožnjo pod vplivom alkohola, so denarne kazni pri nižjih prekoračitvah alkoholiziranosti realno veliko višje v Sloveniji, medtem ko so pri ekstremnih prekoračitvah alkoholiziranosti te višje v Srbiji.

Ključne besede: prometni prekršek, prometna kazen, hitrost, alkoholiziranost, bruto plača, analiza

Abstract: The author's article deals with the comparison of fines for traffic offences related to speeding and drink-driving in Slovenia and Serbia. He has targeted real fines, linked to the standard of living of the inhabitants of these two countries. Since both countries have different speed limits and different restrictions on the allowed degree of alcohol consumption, the author has unified the specific restriction intervals so that they could be compared. The analysis of the data obtained from the survey showed that the fines for speeding in built-up areas and outside built-up areas are considerably higher in Slovenia, while fines in Serbia are higher on motorways and highways. Fines in Serbia are also higher for extreme speeding, irrespective of the road type. In drink-driving related offences, fines for lower exceedances of the allowed alcohol limit are much higher in Slovenia, while Serbia has higher fines in extreme cases of alcohol abuse.

Keywords: traffic offence, traffic fine, speed, drink-driving, gross salary, analysis

1 UVOD

Na začetku meseca aprila (10. 4. 2018) je Evropska komisija izdala poročilo o varnosti v cestnem prometu v državah EU za leto 2017. Čepprav se število udeležencev (vozil) v cestnem

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prometu nenehno povečuje, komisija ugotavlja, da se je število prometnih nesreč s smrtnim izidom v letu 2017 v primerjavi z letom 2016 zmanjšalo za 2 %. Tako je v letu 2017 v prometnih nesrečah v EU umrlo 25.300¹⁹⁵ oseb, kar pomeni 300 oseb manj kot v letu 2016. V primerjavi z letom 2010 se je število smrtnih žrtev v letu 2017 zmanjšalo za 6.200 oz. 20 % [1]. Vendar s temi rezultati evropska komisija ni najbolj zadovoljna, saj si je le-ta zadala cilj, da bi se število smrtnih žrtev do leta 2020 v primerjavi z letom 2010 zmanjšalo za 50 % [2]. To pomeni, da bi se moralo v naslednjih 3 letih število smrtnih žrtev v cestnem prometu zmanjšati za 9.550 oz. bi se moralo vsako naslednje leto zmanjšati število le-teh za cca. 17 %¹⁹⁶ glede na predhodno leto. To pa je veliko več od lanskoletnih 2 %.

Najbolj varen cestni promet v EU¹⁹⁷ imajo na Švedskem, kjer so imeli v letu 2017 25 smrtnih žrtev na milijon prebivalcev. Sledita Združeno kraljestvo s 27 in Nizozemska z 31 smrtnimi žrtvami na milijon prebivalcev. Na drugi strani imata Romunija z 98 in Bolgarija s 96 smrtnimi žrtvami na milijon prebivalcev najvišjo stopnjo umrljivosti v cestnem prometu v EU [3]. Načeloma velja ugotovitev, da imajo države z višjim življenjskim standardom bolj varen cestni promet (relativno manjše število smrtnih žrtev) kot države z nižjim življenjskim standardom.

Najpogostejša vzroka za prometne nesreče (tudi s smrtnim izidom) sta prehitra vožnja in vožnja pod vplivom alkohola. Zato je Evropska komisija, ki je v mesecu maju (17. 5. 2018) izdala prilogo z naslovom "Evropa na poti. Trajnostna mobilnost za Evropo: varna, povezana in čista", v kateri je predstavila strateški akcijski načrt za varnost v cestnem prometu. Načrt predvideva 8 konkretnih področij za izboljšanje varnosti v cestnem prometu in daje velik pomen tudi področju, vezanemu na vedenje udeležencev v prometu (Varna uporaba ceste) s poudarkom na ukrepih, ki bi onemogočili prehitro vožnjo in vožnjo pod vplivom alkohola [4].

Zato države EU prekrške, povezane s prehitro vožnjo in vožnjo pod vplivom alkohola, tudi najbolj sankcionirajo, saj so kazni za te prekrške veliko višje kot za nekatere druge prometne prekrške. Seveda pa se tovrstne kazni med državami precej razlikujejo. Pri tem ne mislim samo na nominalno višino kazni (države z višjim življenjskim standardom imajo po navadi nominalno višje kazni kot države z nižjim življenjskim standardom), ampak na realno višino kazni. To pomeni, da je potrebno višino kazni primerjati z življenjskim standardom v neki državi. Npr. Slovenija, ki je po življenjskem standardu nekje na sredini vseh držav EU, ima tudi nominalne kazni za prometne prekrške v evropskem poprečju [5]. Toda če se primerja z nekaterimi sosednjimi (bližnjimi) državami, kot so npr. Italija, Avstrija, Nemčija, ki imajo višji življenjski standard, so njene kazni realno veliko višje kot v omenjenih državah.

Ker me je zanimalo, ali velja to npr. tudi za evropske države izven EU, sem se v svoji raziskavi odločil, da bom izvedel primerjavo med Slovenijo in Srbijo¹⁹⁸. Moj glavni cilj je bil ugotoviti, ali so realne višine kazni v Srbiji za tovrstne prekrške primerljive s kaznimi v Sloveniji oz. ali so te višje ali nižje.

2 PRIKAZ IZVEDBE RAZISKAVE

V raziskavi je bil moj namen prikazati višino kazni za prekrške, ki so najpogostejši vzrok prometnih nesreč (nesreč s smrtnim izidom). To so prekrški, vezani na prehitro vožnjo in vožnjo pod vplivom alkohola. Zanimalo me je, kako je s tem v Sloveniji in Srbiji. Na podlagi raziskave

¹⁹⁵ V celem svetu je v prometnih nesrečah umrlo cca. 1,3 mio. oseb [2].

¹⁹⁶ Izračun avtorja prispevka.

¹⁹⁷ Povprečje smrtnih žrtev na milijon prebivalcev v EU je bilo 49 [3].

¹⁹⁸ Izbira povezana z mednarodno konferenco LIMEN 2018 v Beogradu (opomba avtorja)

sem hotel ugotoviti, kakšne so realne višine teh kazni, saj nominalne primerjave ne dajo pravih rezultatov. Upoštevati je potrebno življenjski standard v eni in drugi državi, da se lahko pridobljeni rezultati med seboj realno primerjajo.

Pri iskanju podatkov, povezanih z omejitvijo hitrosti in višino kazni za prekoračitev le-teh, sem se v raziskavi omejil na 4 tipične kategorizacije (vrste) cest. To so:

- ceste v naselju,
- ceste izven naselja,
- ceste za motorna vozila in
- avtoceste.

Prav tako sem pri višinah kazni za prekrške prehitre vožnje oz. vožnje pod vplivom alkohola upošteval samo denarne kazni, ne pa tudi morebitnih dodatnih kazenskih točk, kazni odvzema izpita ali celo kazni zapora. V tabeli 1 so prikazane omejitve hitrosti za izbrane vrste cest v Sloveniji [6] in Srbiji [7].

Tabela 1: Prikaz omejitev hitrosti v Sloveniji in Srbiji (avtorjev vir)

| Država | Slovenija | Srbija |
|--------------------------|------------------|-------------------------|
| Omejitev hitrosti | Hitrost | Hitrost |
| V naselju | 50 km/h | 50 km/h |
| Izven naselja | 90 km/h | 80 km/h |
| Cesta za motorna vozila | 110 km/h | 100 km/h |
| Avtocesta | 130 km/h | 130 km/h ¹⁹⁹ |

Vidimo, da je omejitev hitrosti v naselju in na avtocesti povsem enaka, medtem ko je omejitev hitrosti izven naselja in na cesti za motorna vozila v Srbiji nižja za 10 km/h. V tabeli 2 so prikazane kazni za prekoračitev hitrosti na izbranih vrstah cest v Sloveniji [9] in Srbiji [10]. Pri preračunu srbskih dinarjev (SRD) v EUR sem upošteval tečajno razmerje Banke Slovenije v mesecu juliju [11], ki je znašalo: 1 EUR = 118,23 SRD.

Tabela 2: Prikaz višine kazni za prekoračitev hitrosti v Sloveniji in Srbiji (avtorjev vir)

| Država | Slovenija | | Srbija | |
|--------------------|-----------------------|------------|-----------------------|----------------------|
| Vrsta ceste | Prekoračitev hitrosti | Kazen | Prekoračitev hitrosti | Kazen |
| V naselju | do 5 km/h | 40,00 € | do 10 km/h | 25,00 € |
| | od 6 do 10 km/h | 80,00 € | od 11 do 20 km/h | 42,00 € |
| | od 11 do 20 km/h | 250,00 € | od 21 do 30 km/h | 84,00 € |
| | od 21 do 30 km/h | 500,00 € | od 31 do 50 km/h | 84,00 € - 168,00€ |
| | od 31 do 50 km/h | 1.000,00 € | od 51 do 70 km/h | 168,00 € - 336,00€ |
| | več kot 50 km/h | 1.200,00 € | od 71 do 90 km/h | 840,00 € - 1.008,00€ |
| Izven naselja | do 10 km/h | 40,00 € | do 20 km/h | 25,00 € |
| | od 11 do 20 km/h | 80,00 € | od 21 do 30 km/h | 42,00 € |
| | od 21 do 30 km/h | 160,00 € | od 31 do 40 km/h | 84,00 € |
| | od 31 do 40 km/h | 250,00 € | od 41 do 60 km/h | 84,00 € - 168,00€ |
| | od 41 do 50 km/h | 500,00 € | od 61 do 80 km/h | 168,00 € - 336,00€ |
| | več kot 50 km/h | 1.200,00 € | od 81 do 100 km/h | 840,00 € - 1.008,00€ |

¹⁹⁹ Skupščina Srbije je 25.05.2018 dvignila omejitve hitrosti na avtocesti s 120 km/h na 130 km/h [8].

| | | | | |
|-------------------------|------------------|------------|-------------------|----------------------|
| Cesta za motorna vozila | do 10 km/h | 40,00 € | do 20 km/h | 25,00 € |
| | od 11 do 30 km/h | 80,00 € | od 21 do 30 km/h | 42,00 € |
| | od 31 do 40 km/h | 160,00 € | od 31 do 40 km/h | 84,00 € |
| | od 41 do 50 km/h | 250,00 € | od 41 do 60 km/h | 84,00 € - 168,00€ |
| | od 51 do 60 km/h | 500,00 € | od 61 do 80 km/h | 168,00 € - 336,00€ |
| | več kot 60 km/h | 1.200,00 € | od 81 do 100 km/h | 840,00 € - 1.008,00€ |
| Avtocesta | do 10 km/h | 40,00 € | do 20 km/h | 25,00 € |
| | od 11 do 30 km/h | 80,00 € | od 21 do 30 km/h | 42,00 € |
| | od 31 do 40 km/h | 160,00 € | od 31 do 40 km/h | 84,00 € |
| | od 41 do 50 km/h | 250,00 € | od 41 do 60 km/h | 84,00 € - 168,00€ |
| | od 51 do 60 km/h | 500,00 € | od 61 do 80 km/h | 168,00 € - 336,00€ |
| | več kot 60 km/h | 1.200,00 € | od 81 do 100 km/h | 840,00 € - 1.008,00€ |

Iz tabele lahko vidimo, da so nekateri intervali prekoračitve hitrosti enaki (npr. od 31 do 40 km/h na cestah izven naselja), večina le-teh pa so različni, kar še posebej velja pri večjih hitrostih. V Sloveniji je za ceste v naselju in izven naselja ob prekoračitvi hitrosti za več kot 50 km/h denarna kazen enotna in znaša 1.200 EUR (enako velja za ceste za motorna vozila in avtoceste ob prekoračitvi dovoljene hitrosti za več kot 60 km/h), medtem ko so v Srbiji pri večjih hitrostih posamezni intervali prekoračitve hitrosti bolj razdelani – v naselju do 90 km/h, izven naselja do 100 km/h²⁰⁰.

Če pogledamo nominalne višine denarnih kazni, lahko vidimo, da so pri manjših prekoračitvah hitrosti le-te v Sloveniji veliko višje kot v Srbiji – nekje od 2- do 3-krat višje. Se pa zato pri največjih prekoračitvah hitrosti denarne kazni v Srbiji približajo denarnim kaznim v Sloveniji (zaradi že omenjene enotne denarne kazni), saj najvišja denarna kazen v Srbiji doseže dobrih 1.000 EUR.

V tabeli 3 so prikazane še dovoljene stopnje alkohola v litru izdihanega zraka oz. v kilogramu krvi, ki jih lahko ima voznik v cestnem prometu v Sloveniji [9] in Srbiji [10]. Ker je Slovenija že v letu 2005 uvedla nov način merjenja alkoholiziranosti voznikov z uvedbo etilometrov [12], ki merijo miligrame alkohola v litru izdihanega zraka, medtem ko v Srbiji še vedno merijo stopnjo alkoholiziranosti v gramih (promilih) alkohola v kilogramu krvi, sem za primerjavo omejitev uporabil oba načina merjenja.

Tabela 3: Prikaz omejitev za vožnjo pod vplivom alkohola v Sloveniji in Srbiji (avtorjev vir)

| Država | Slovenija | Srbija |
|--|------------------|------------------|
| Omejitev za vožnjo pod vplivom alkohola | Stopnja alkohola | Stopnja alkohola |
| miligrami v litru izdihanega zraka | do 0,24 mg/l | do 0.09 mg/l |
| grami v kilogramu krvi | do 0,50 g/kg | do 0.20 g/kg |

Pri preračunu sem upošteval razmerje med obema meritvama. Pomeni, če meritev v gramih alkohola v kilogramu krvi delim z 2,10, dobim meritev v miligramih alkohola v litru izdihanega zraka. Lahko vidimo, da so v Srbiji veliko bolj rigorozni glede dovoljene stopnje alkohola, saj je še dovoljena omejitev za vožnjo pod vplivom alkohola cca. 2,5-krat nižja kot v Sloveniji. Kako pa je glede višine kazni za prekoračitev dovoljenih stopenj alkohola?

²⁰⁰ V Srbiji je za prekoračitev hitrosti nad 90 km/h (100 km/h) zagrožena zaporna kazen od 30 – 60 dni [10].

V tabeli 4 so prikazane denarne kazni za prekoračitev dovoljenih stopenj alkohola. Spet lahko vidimo, da so v Srbiji posamezni intervali prekoračitve stopnje alkoholiziranosti bolj podrobno razdelani²⁰¹ (en interval je popolnoma enak tako v Sloveniji kot tudi v Srbiji). To gre spet na račun tega, da je v Sloveniji ob prekoračitvi stopnje alkohola za več kot 0,52 miligrama na liter izdihanega zraka (več kot 0,10 grama v kilogramu krvi) denarna kazen zopet enotna in znaša 1.200 EUR.

Tabela 4: Prikaz višine kazni za prekoračitev dovoljene stopnje alkohola v Sloveniji in Srbiji (avtorjev vir)

| Država | Slovenija | | Srbija | |
|------------------------------------|-------------------------------|------------|-------------------------------|----------------------|
| | Prekoračitev stopnje alkohola | Kazen | Prekoračitev stopnje alkohola | Kazen |
| Miligrami v litru izdihanega zraka | od 0,25 do 0,38 mg/l | 600,00 € | od 0.10 do 0.24 mg/l | 84,00 € |
| | od 0,39 do 0,52 mg/l | 900,00 € | od 0.25 do 0.38 mg/l | 84,00 € - 168,00€ |
| | več kot 0,52 mg/l | 1.200,00 € | od 0.39 do 0.57 mg/l | 168,00 € - 336,00€ |
| | | | od 0.58 do 0.76 mg/l | 840,00 € - 1.008,00€ |
| | | | od 0.77 do 0.95 mg/l | 840,00 € - 1.008,00€ |
| Grami v kilogramu krvi | od 0,51 do 0,80 g/kg | 600,00 € | od 0.21 do 0.50 g/kg | 84,00 € |
| | od 0,81 do 1,10 g/kg | 900,00 € | od 0.51 do 0.80 g/kg | 84,00 € - 168,00€ |
| | več kot 1,10 g/kg | 1.200,00 € | od 0.81 do 1.20 g/kg | 168,00 € - 336,00€ |
| | | | od 1.21 do 1.60 g/kg | 840,00 € - 1.008,00€ |
| | | | od 1.61 do 2,00 g/kg | 840,00 € - 1.008,00€ |

Če pogledamo višine denarnih kazni, vidimo, da so le-te v Sloveniji nominalno bistveno višje kot v Srbiji. To še posebej velja pri nižjih stopnjah prekoračitve alkoholiziranosti, saj so tam denarne kazni tudi do 7-krat višje (600 € : 84 €). Z večanjem prekoračitve dovoljenih mej alkoholiziranosti pa se tudi nominalna razlika med slovenskimi in srbskimi denarnimi kaznimi manjša, saj doseže maksimalna denarna kazen za največje prekoračitve v Srbiji zopet dobrih 1.000 EUR.

Kot sem že omenil, gre tukaj za primerjavo nominalnih višin denarnih kazni, kar pa ne odraža realnih razmer v obeh državah. Zato me je zanimalo, kakšne so realne denarne kazni v Sloveniji in Srbiji za prekrške prehitre vožnje in vožnje pod vplivom alkohola. V naslednjem poglavju bom na podlagi pridobljenih podatkov predstavil analizo raziskave ter podal ugotovitve le-te.

3 ANALIZA IN UGOTOVITVE RAZISKAVE

V svoji analizi raziskave sem želel ugotoviti, kakšne so v resnici realne višine prometnih kazni v obeh državah. Nominalno so namreč lahko denarne kazni med seboj zelo primerljive, realno pa so zelo različne. Zato sem pri izračunu realnih prometnih kazni upošteval življenjski standard v obeh državah, natančneje upošteval sem njuno poprečno bruto plačo. Tako je poprečna bruto plača v mesecu maju v Sloveniji znašala 1.663 EUR [13], poprečna bruto plača v mesecu aprilu v Srbiji pa je znašala 574 EUR [14].

Ker so posamezni intervali omejitev hitrosti v obeh državah definirani različno, sem pri preračunavanju višine kazni za prehitro vožnjo, da bi bili rezultati analize čim bolj primerljivi, le-te nekoliko priredil, tako da so bili enaki tako v Sloveniji kot tudi v Srbiji. V tabeli 5 so

²⁰¹ V Srbiji je za prekoračitev stopnje alkohola nad 2,00 g/kg (0,95 mg/l) zagrožena zaporna kazen od 30 – 60 dni [10].

prikazani enotni intervali omejitev hitrosti v naselju. Na podoben način sem definiral skupne intervale omejitev hitrosti še za preostale vrste cest.

Tabela 5: Prikaz višine kazni za prekoračitev hitrosti pri enotnih intervalih omejitev hitrosti v Sloveniji in Srbiji (avtorjev vir)

| Država | | Slovenija | Srbija |
|-------------|-----------------------|-----------|--------|
| Vrsta ceste | Prekoračitev hitrosti | Kazen | Kazen |
| V naselju | do 10 km/h | 60 € | 25 € |
| | od 11 do 20 km/h | 250 € | 42 € |
| | od 21 do 30 km/h | 500 € | 84 € |
| | od 31 do 50 km/h | 1.000 € | 126 € |
| | od 51 do 70 km/h | 1.200 € | 252 € |
| | od 71 do 90 km/h | 1.200 € | 924 € |

Zaradi poenotenja intervalov omejitve hitrosti sem moral nekoliko tudi preračunati višine denarnih kazni, ki veljajo za le-te (tabela 5). To še posebej velja za Srbijo, ki ima pri določenih intervalih denarne kazni izražene v intervalu od - do (npr. 84,00 € - 168,00 €). Za takšne intervale sem upošteval poprečno denarno kazen²⁰² oz. sem uporabil kar linearno odvisnost razmerij med višinami hitrosti in višinami prometnih kazni²⁰³.

Tako pridobljene denarne kazni za prekoračitve hitrosti sem delil s poprečno bruto plačo v Sloveniji in Srbiji ter dobil podatke o tem, kolikšen delež poprečne bruto plače dosegajo posamezne denarne kazni v obeh državah (slika 1). Ker gre sedaj za realne vrednosti teh kazni, sem jih lahko zato med seboj tudi realno primerjal. Vidimo, da so denarni kazni pri najmanjših prekoračitvah hitrosti (do 10 km/h) realno popolnoma enake in predstavljajo cca. 4 % poprečne bruto plače v Sloveniji in Srbiji. Se pa z večanjem prekoračitev hitrosti denarne kazni v Sloveniji veliko hitreje višajo in so pri prekoračitvah hitrosti od 31 do 50 km/h realno skoraj 3-krat višje (60 % : 22 %) kot v Srbiji.

Situacija se spremeni pri prekoračitvah hitrosti za več kot 50 km/h. Če je v Sloveniji od te prekoračitve hitrosti naprej določena enotna denarna kazen v višini 1.200 EUR, kar predstavlja 72 % povprečne bruto plače, se v Srbiji z nadaljnjim povečevanjem prekoračitve hitrosti povišuje tudi denarna kazen. Tako znaša poprečna denarna kazen za prekoračitev hitrosti od 51 do 70 km/h 252 EUR, kar znese 44 % poprečne bruto plače v Srbiji.

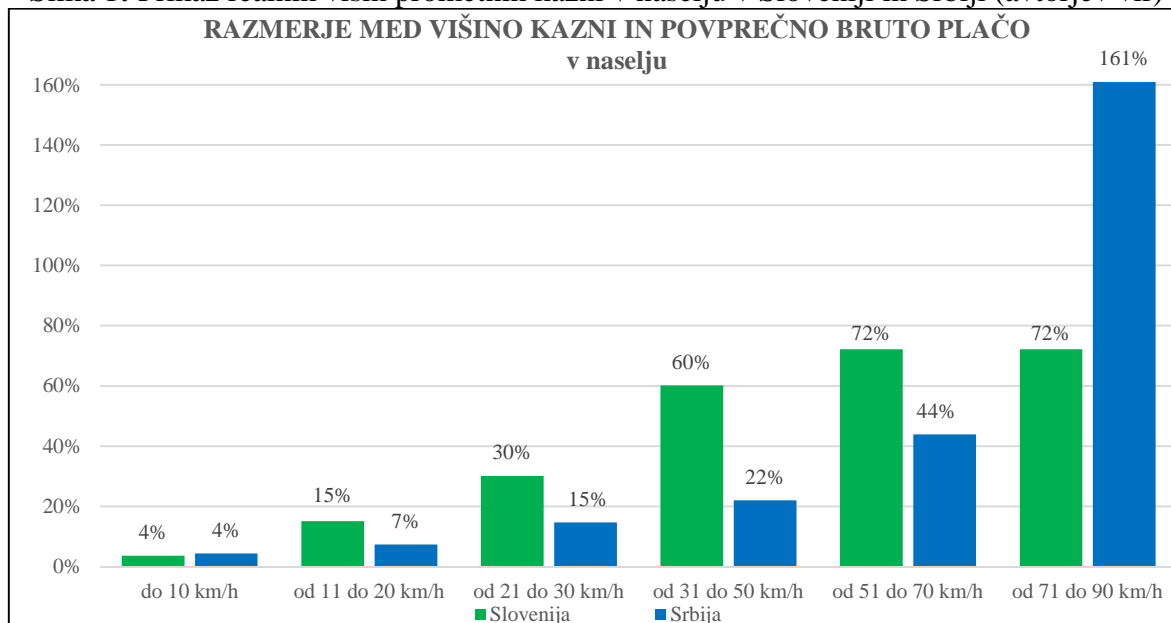
Zelo močno pa se povišajo denarne kazni za prekoračitev hitrosti od 71 do 90 km/h, saj znaša tukaj poprečna denarna kazen 924 EUR, kar znese več kot eno in pol (161 %) poprečne bruto plače v Srbiji²⁰⁴. To pomeni, da je pri teh prekoračitvah hitrosti denarna kazen v Srbiji realno več kot 2-krat (2,34) višja kot v Sloveniji.

²⁰² Npr. $(84,00 \text{ €} + 168,00 \text{ €})/2 = 126 \text{ €}$ (opomba avtorja).

²⁰³ Npr. prekoračitev hitrosti 30 km/h, kazen 84 €, prekoračitev hitrosti 35 km/h, kazen 95 € (opomba avtorja).

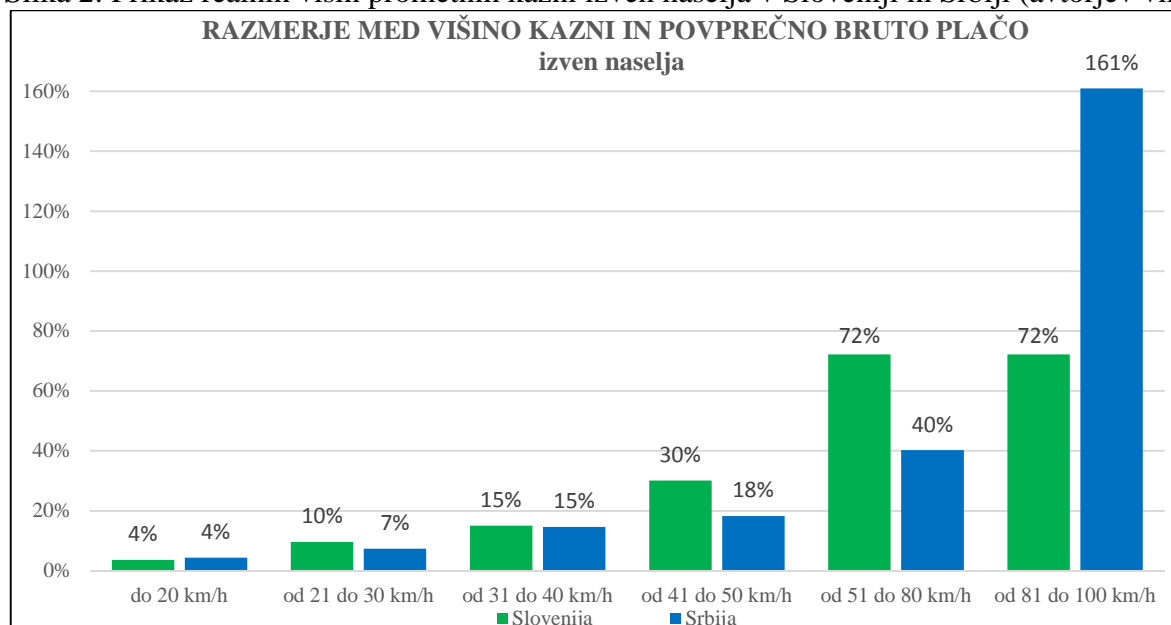
²⁰⁴ Pri najvišji možni denarni kazni 1.008 EUR je to skoraj dve (175 %) poprečni bruto plači (opomba avtorja).

Slika 1: Prikaz realnih višin prometnih kazni v naselju v Sloveniji in Srbiji (avtorjev vir)



V naslednjem grafu (slika 2) so prikazane realne denarne kazni za prekoračitev hitrosti izven naselja. Za razliko od denarnih kazni v naselju so tukaj le-te pri manjših prekoračitvah hitrosti (do 40 km/h) v Sloveniji in Srbiji skoraj realno popolnoma enake. Pri prekoračitvi hitrosti od 41 do 80 km/h se denarne kazni v Sloveniji veliko bolj povešajo in dosežejo več kot 1,5-kratno realno vrednost (72 % : 44 %) denarnih kazni v Srbiji. Pri največjih prekoračitvah hitrosti (nad 71 km/h) pa so denarne kazni realno v Srbiji zopet bistveno višje (2,34 : 1) kot v Sloveniji.

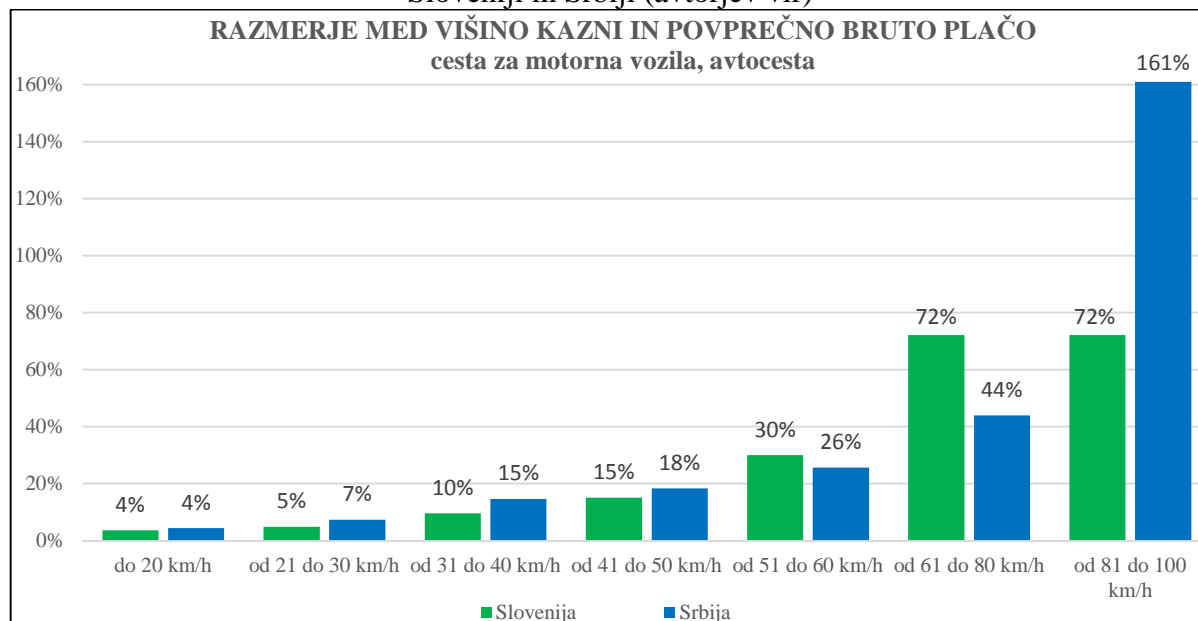
Slika 2: Prikaz realnih višin prometnih kazni izven naselja v Sloveniji in Srbiji (avtorjev vir)



Ker so denarne kazni za prikazane intervale prekoračitve hitrosti na cestah za motorna vozila in avtocestah v Sloveniji in Srbiji popolnoma enake, sem jih v naslednjem grafu (slika 3) združil. Tukaj lahko vidimo spremembo trenda razmerij denarnih (realnih) kazni med Slovenijo in Srbijo. Če so bila prej (v naselju in izven naselja) razmerja pri manjših prekoračitvah hitrosti na določenih intervalih popolnoma enaka oz. so bile denarne kazni realno višje v Sloveniji, se na cestah za motorna vozila oz. avtocestah zadeva obrne. Tako so pri manjših prekoračitvah

hitrosti (do 50 km/h) denarne kazni v Srbiji realno višje tudi za 50 % (15 % : 10 %). Pri prekoračitvah hitrosti od 51 do 80 km/h so denarne kazni v Sloveniji zopet realno višje, pri največjih prekoračitvah hitrosti (od 81 do 100 km/h) pa so le-te v Srbiji ponovno bistveno višje kot v Sloveniji.

Slika 3: Prikaz realnih višin prometnih kazni na cesti za motorna vozila oz. avtocesti v Sloveniji in Srbiji (avtorjev vir)

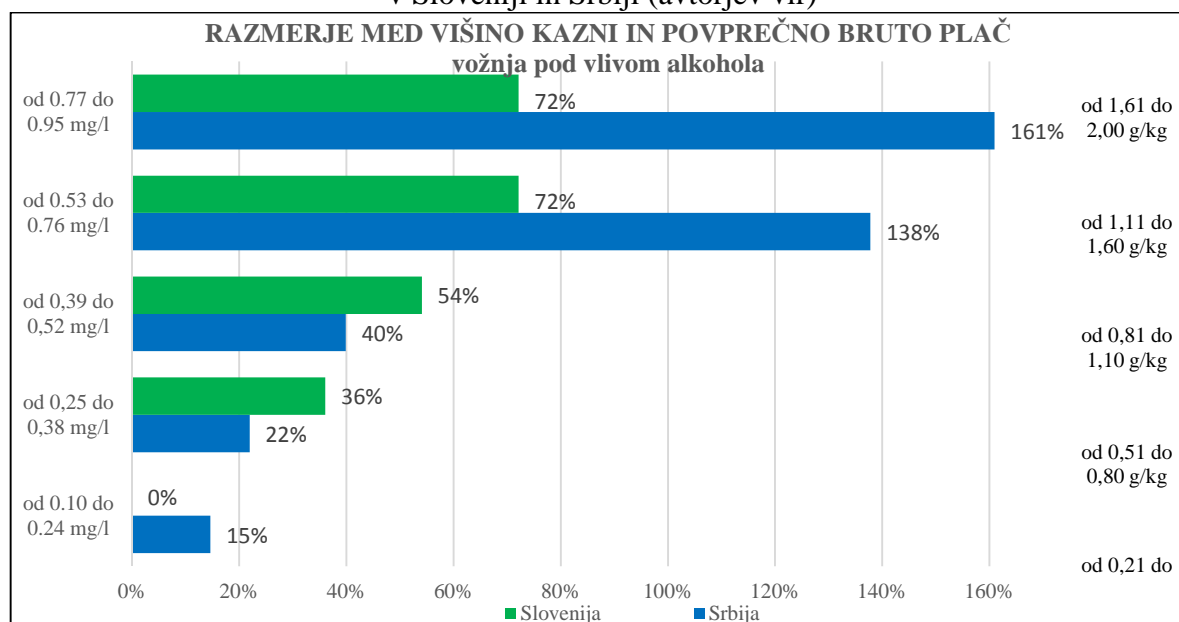


Iz prikazanih rezultatov analize lahko ugotovimo, da so denarne kazni za prekoračitve hitrosti, tako v naselju kot tudi izven naselja realno višje (tudi do cca. 3-krat) v Sloveniji. Po drugi strani so denarne kazni za prekoračitve hitrosti (do 50 km/h) na cestah za motorna vozila in avtocestah realno višje (tudi do 50 %) v Srbiji. Kot nekakšna rdeča nit pa velja ugotovitev, da so denarne kazni na vseh analiziranih vrstah cest pri ekstremnih prekoračitvah hitrosti v Srbiji realno veliko višje (tudi do cca. 2,5-krat) kot v Sloveniji.

Poglejmo sedaj, kako je z denarnimi kaznimi za vožnjo pod vplivom alkohola. Tudi tukaj sem določene intervale alkoholiziranosti, podobno kot pri intervalih prekoračitve hitrosti, zaradi potrebe po poenotenju nekoliko priredil. Kot sem že omenil (točka 2), merijo v Sloveniji stopnjo alkoholiziranosti v miligramih alkohola v litru izdihanega zraka, medtem ko v Srbiji v gramih (promilih) alkohola v kilogramu krvi. Ker so denarne kazni v izbranih intervalih ne glede na način merjenja stopnje alkoholiziranosti popolnoma enake, sem v grafu (slika 4) le-te združil.

Vidimo, da ima v prvem intervalu stopnje alkoholiziranosti od 0,10 do 0,24 mg/l (od 0,21 do 0,50 g/kg) denarno kazen samo Srbija, saj ima Slovenija višjo še dovoljeno omejitev stopnje alkoholiziranosti (do 0,24 mg/l oz. do 0,50 g/kg). Zato pa so denarne kazni v naslednjih intervalih alkoholiziranosti, od 0,25 do 0,52 mg/l (0,51 do 1,10 g/kg), v Sloveniji relativno višje tudi do 35 % (54 % : 40 %). Zadeva se drastično spremeni pri ekstremnih povišanih stopnje alkoholiziranosti. Ker je v Sloveniji denarna kazen za prekoračitev stopnje alkoholiziranosti nad 0,52 mg/l (1,10 g/kg) enotna in znaša 1.200 EUR, v Srbiji pa se nad stopnjo 0,57 mg/l (1,20 g/kg) denarne kazni bistveno povišajo, so zato le-te realno v Srbiji veliko višje kot v Sloveniji.

Slika 4: Prikaz realnih višin prometnih kazni za vožnjo pod vplivom alkohola v Sloveniji in Srbiji (avtorjev vir)



Podobno kot v primerih ekstremnih prekoračitev hitrosti so tudi v primerih ekstremne alkoholiziranosti denarne kazni v Srbiji realno tudi do cca. 2,5-krat višje kot v Sloveniji.

4 ZAKLJUČEK

V prispevku sem izvedel analizo višine prometnih prekrškov, ki so posledica prevelike hitrosti oz. vožnje pod vplivom alkohola v Sloveniji in Srbiji. Zanimalo me je, v kateri državi so denarne kazni za te prekrške realno višje. Pri tem se je izkazalo, da so v večini primerov denarne kazni za prehitro vožnjo v naselju in izven naselja realno višje v Sloveniji. Pod drugi strani pa so kazni za prehitro vožnjo na cestah za motorna vozila in avtocestah v večini primerov realno višje v Srbiji. To je nekoliko nenavadno, saj je znano, da so avtoceste varnejše kot preostale vrste cest [3], kjer se tudi pripeti največ prometnih nesreč s smrtnim izidom.

Zelo podobna situacija vlada tudi pri denarnih kaznih za prekrške, povezane z vožnjo pod vplivom alkohola. Če odmislimo dejstvo, da ima Srbija nižjo dovoljeno stopnjo alkoholiziranosti, so pri manjših prekoračitvah denarne kazni v Sloveniji relativno precej višje kot v Srbiji. Šele pri ekstremnih prekoračitvah dovoljene stopnje alkoholiziranosti so denarne kazni realno zopet precej višje v Srbiji.

Morda lahko tudi v teh dejstvih iščemo nekatere od glavnih razlogov²⁰⁵, da je imela Slovenija v letu 2017 50 smrtnih žrtev na milijon prebivalcev [1], kar jo je uvrščalo v povprečje EU²⁰⁶, medtem ko je imela Srbija v letu 2016²⁰⁷ 86 smrtnih žrtev na milijon prebivalcev [15] – pomeni, da je v Srbiji na milijon prebivalcev cca. 72 % več smrtnih žrtev kot v Sloveniji. Ta primerjava tudi nekako potrjuje trditev Evropske komisije iz uvodnega dela mojega prispevka, ki ugotavlja, da imajo države z višjim življenjskim standardom (načeloma) relativno manjše število smrtnih žrtev kot države z nižjim življenjskim standardom.

²⁰⁵ Osebno mnenje avtorja prispevka.

²⁰⁶ Povprečje v EU je v letu 2017 znašalo 49 smrtnih žrtev na milijon prebivalcev [1].

²⁰⁷ Avtor ni uspel pridobiti novejših podatkov.

Kot sem že omenil na začetku izvedbe raziskave, sem pri kaznih za prometne prekrške prehitre vožnje in vožnje pod vplivom alkohola upošteval samo denarne kazni, ne pa tudi dodatnih kazenskih točk, odvzem voznškega izpita in kazen zapor. Ker vse te kazni še dodatno vplivajo (neposredno oz. posredno) na višino denarnih kazni določenih prometnih prekrškov, je tukaj še dovolj možnosti za natančnejše analize in primerjave le-teh.

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<https://data.oecd.org/transport/road-accidents.htm>

**POJEDINI OBLICI BEZBJEDNOSNIH PRIJETNJI TURIZMU SA
POSEBNIM OSVRTOM NA PRIJETNJE OBJEKTIMA SMJEŠTAJA**

**CERTAIN FORMS OF SECURITY THREATS TO TOURISM WITH
SPECIAL ATTENTION TO ACCOMMODATION FACILITIES**

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Apstrakt: Ovaj rad je posvećen jednom broju oblika bezbjednosnih prijetnji turizmu i objektima u ugostiteljstvu. Bezbjednosne prijetnje kao što su organizovani kriminalitet, terorizam, krađa ili nasilne promjene vlasti (puč) utiču na bezbjednosnu situaciju pa time i na opredjeljenje turista (posjetilaca) u izboru države odnosno turističke destinacije gdje će putovati. Sa druge strane, svi akteri u zemlji domaćina odnosno u svim ugostiteljskim i turističkim objektima moraju biti svjesni značaja bezbjednosti i posvetiti joj odgovarajuću pažnju. U odnosu na ovo, u radu autori postavljaju osnovno pitanje koje se identifikuje iz problema istraživanja: koliko je turizam značajan kao privredna djelatnost, koje bezbjednosne prijetnje ugrožavaju turizam, kakav bezbjednosni ambijent stvarati, kao i koje metode i sredstva koriste izvršioци krivičnih djela. Cilj rada je da se prikažu razorni efekti bezbjednosnih prijetnji koje djeluju prema turizmu odnosno objektima smještaja. Pored navedenog, cilj je i da se na osnovu događaja prikaže uzročno-posljedična veza koju turizam i objekti smještaja imaju sa bezbjednošću. Na kraju, kakav je sistem sprječavanja – primjeren opasnostima i potrebama suprotstavljanja, ako bezbjednost ne bude integralni dio turizma u ekonomskim, funkcionalnim i organizacijskim segmentima.

Ključne riječi: turizam, objekti smještaja, bezbjednost, prijetnje.

Abstract: This paper is devoted to specific number of security threats to tourism and catering facilities. Security threats such as organized crime, terrorism, theft or coup influence the security situation and thus the commitment of tourists (visitors) in the choice of the state or tourist destination where they will travel. On the other hand, all participants in the host country, or in all catering and tourist facilities, must be aware of the importance of security and give them proper attention. In relation to this, the authors ask the basic question that is identified from the research problem: how important is tourism as an economic activity, what security threats tourism, what security environment to create, and what methods and means are used by perpetrators of criminal offenses. The aim of this paper is to show the destructive effects of security threats that affect tourism or accommodation. In addition to the said above, the goal is also to show the cause and effect link that tourism and accommodation facilities have with security. What is the system of prevention like - suitable for the dangers and needs of opposing, if security is not an integral part of tourism in the economic, functional and organizational segments.

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Keywords: *tourism, accommodation facilities, security, threats.*

UVOD

Državne institucije na makro nivou treba da omoguće nesmetane uslove za obavljanje privredne djelatnosti – turizma, ali privredni subjekti kao i zaposleni u turizmu odnosno objektima smještaja moraju preduzimati aktivnosti i mjere preventivnog djelovanja za slučaj ispoljenog terorističkog ili drugog događaja - reaktivne mjere. Ovdje treba imati u vidu da se napadima na objekte smještaja napada turizam kao privredna djelatnost kao i privredna društva, što direktno slabi finansijske prihode ne samo jedne kompanije već i države. Iskustva govore da se bezbjednost u turizmu i objektima smještaja ne posmatra sistemski već od pojedinačnog iskustva bilo vlasnika ili rukovodioca. Ono što treba istaći jeste njihova glomaznost i prostorna rasprostranjenost, pa je nemoguće uspostaviti potpuni fizičko-tehnički nadzor i kontrolu objekata i prostora, što ih čini „lakom metom”. Dakle, preduslov uspješnog turističkog nastupa je sistemski proces i analiza bezbjednosti kao integralne komponente u cilju pozicioniranja položaja turističke destinacije, koji mora biti najpogodniji i najprofitabilniji.

TURIZAM I NJEGOV ZNAČAJ

Privredne djelatnosti se međusobno razlikuju prema vrsti i djelokrugu rada, obimu, opremi i rezultatima rada. Zajedničke karakteristike diferenciraju privredu u tri osnovna sektora: primarni (poljoprivreda, šumarstvo, rudarstvo), sekundarni (industrija, građevinarstvo, proizvodno zanatstvo) i tercijarni (uslužno zanatstvo, trgovina, saobraćaj, komunalne djelatnosti, osiguranje, banke, turizam, ugostiteljstvo) [2]. Ugostiteljski objekti su: hotel & resort, wild beauty resort, mali hotel, boutique hotel, hotel garni, apart hotel, condo-hotel, hostel, pansion i motel, turističko naselje, etno selo, odmaralište, kamp, restoran, konoba, caffè barovi, objekti brze hrane, itd.[13]. Razvijene turističke zemlje od turističke privrede ostvaruju visoke prihode od stranih turista i bilježe značajne procenete učešća ovih prihoda u društvenom proizvodu u okvirima nacionalne ekonomije. U brojnim turističkim odredištima upravo je turizam najvažnija privredna grana.

U turizmu postoje faktori koji motivišu turiste na kretanje i promjenu mjesta boravka. Turističku ponudu čine atraktivni, saobraćajni i prihvatni faktori. Elementi *atraktivnih faktora* su: more i obala, kanjoni, vulkani, klima, zelene površine... Pored ovih, sledeći elementi ovih faktora su: spomenici, crkve, zamkovi, stari gradovi (npr. Kotor), muzeji (npr. Luvr), teatri (npr. Boljšoj), opera, organizovanje naučnih skupova, filmski festivali (npr. Kan i Venecija), tradicionalne igre (npr. ceremonijal Bokeljške mornarice), zabavne i sportske manifestacije, sajmovi, izložbe... *Saobraćajni faktori* podrazumijevaju zastupljenost svih vidova saobraćaja od željezničkog, pomorskog, drumskog do vazdušnog. *Prihvatni faktor* i ponude utiču na sve već navedene faktore zbog arhitektonskih rješenja objekata ili nivoa usluge. Tako je omiljeno ljetovalište Brižit Bardo bilo Sen Trope, a Sveti Stefan Sofije Loren. Direktni prihvatni kapaciteti su objekti za smještaj, posebno hotelijerstvo. Smještajni objekti su osnovni turistički kapaciteti, a čine ih: hoteli, moteli, pansioni, turistička naselja, kampovi [8]... Ovi turistički kapaciteti, kao osnovni, ostvaruju veći dio finansijskih prihoda u turizmu.

Kako navodi Advance Release UNWTO (*World Tourism Organization*) Svetskog turističkog Barometra međunarodni dolasci turista u 2000. godine bili su 674 miliona, 2005. godine bili su 809 miliona, 2010. bili su 950 a 2015. bili su 1184 miliona. Kako trenutno stanje, na određeni način, ukazuje na pitanja bezbjednosti i sigurnosti, treba podsjetiti da razvoj turizma u velikoj

mjeri zavisi od kolektivne sposobnosti svih država da se promovišu sigurna i bezbjedna putovanja. U tom smislu, UNWTO poziva vlade da uključe turističke uprave u njihovo nacionalno bezbjednosno planiranje, strukture i procedure. Takođe, treba obezbijediti da se izloženost turističkog sektora raznim prijetnjama svede na minimum ali i da se poveća sposobnost turizma da podrži bezbjednost i sigurna putovanja [12].

Slično kao u svijetu, i u Crnoj Gori turizam predstavlja vodeću privrednu granu. Analize pokazuju pozitivan uticaj turizma na bruto društveni proizvod (BDP) u Crnoj Gori sa očekivanjem da će se povećati sa 730 miliona eura na 1.791,5 mil. eura do 2019. godine [6]. Prema Zakonu o turizmu [13] u Crnoj Gori pod turističkom djelatnošću podrazumijeva se pružanje usluga u nautičkom, seoskom, zdravstvenom, vjerskom, kongresnom, sportskom ili omladinskom turizmu, pružanje usluga na kupalištima, skijaškim terenima, u lovnom i ribolovnom turizmu, sportsko-rekreativnom, avanturističkom turizmu, ekoturizmu, kulturnom, sportskom, golf turizmu, lovnom, ribolovnom, vjerskom, kao i drugim oblicima turizma.

Istraživanje Nacionalne turističke organizacije Crne Gore, ukazuje da najveći broj gostiju tokom ljeta dolazi u Crnu Goru zbog plivanja i kupanja. Slijedi odlazak u restorane (73%), kupovina (66%), pješačenje (52,5%), posjećivanje lokalnih manifestacija, priredbi i koncerata (51,4%) i razgledanje znamenitosti/posjećivanje muzeja/galerija/izložbi (50,5%) [7]. U posebnom poglavlju pomenutog istraživanja ispitivalo se zadovoljstvo turista ukupnim boravkom kroz 25 elemenata turističke ponude destinacije, a ispitanici su mogli dati ocjene: od 1 (vrlo loše) do 5 (odlično) ili ne znam. Kada je u pitanju element ponude - lična sigurnost, rezultati ispitanika su sledeći: odličan 41.5%, vrlo dobar 27.8 %, dobar 17.8%, loš 2.5%, vrlo loš 1.1%, ne znam 9.2%. U odnosu na istraživanje 69,4 % turista je zadovoljno ličnom sigurnošću u Crnoj Gori [7]. Iz navedenog istraživanja može se ocijeniti da Crna Gora kada je u pitanju lična sigurnost i bezbjednost predstavlja sigurnu turističku destinaciju.

BEZBJEDNOST U TURIZMU I OBJEKTIMA SMJEŠTAJA

Bez obzira na sve pozitivne faktore koji privlače kretanje turista i boravak u raznim smještajnim objektima jednu od odlučujućih uloga u donošenju odluke turiste o putovanju ima političko-bezbjednosna situacija u nekoj turističkoj zemlji odnosno destinaciji gdje se namjerava boraviti. Dakle, bezbjednosne prijetnje, kao što su nemiri, požari ili terorizam imaju presudan uticaj na razvoj turizma. Ali prije nego nastavimo izložićemo izabrane definicije bezbjednosti i prijetnji bezbjednosti sa kojom se susrećemo u ovom radu.

Bezbjednost, autor Slobodan Miletić definiše kao – „pravno uređivanim i obezbjeđivanim društvenim odnosima uspostavljeno, održavano i unapređivano stanje u državi koje omogućava efektivnu zaštićenost države i građana koji u njoj žive od svih (spoljašnjih i unutrašnjih) protivpravnih akata (aktivnosti) kojima se ugrožava ustavni poredak, suverenost, nezavisnost i teritorijalna cjelokupnost države, rad državnih organa, obavljanje privrednih i društvenih djelatnosti i ostvarivanje sloboda, prava i dužnosti čovjeka i građanina”[5].

Bezbjednost se ugrožava raznim oblicima, koji se prema prof. Stajiću, u odnosu odakle dolaze, dijele na spoljne i unutrašnje. Terorizam je spoljni i unutrašnji oblik dok isti autor u unutrašnje oblike ugrožavanja, između ostalih oblika, svrstava i požare i kriminalitet [11]. Prijetnje bezbjednosti su, prema Saši Mijalkoviću: „konkretne pojave čije je nastupanje najmanje neizvjesno, a štetni efekti nesporni. (...) Najopasnije su (...) terorizam i organizovani kriminal”[4].

Iz izloženih definicija navedenih autora primjećujemo da bezbjednosne prijetnje kao terorizam i kriminalitet ugrožavaju privredne djelatnosti i prava i slobode pojedinca. Kao što smo već pomenuli, turizam ne čine samo hoteli i more, već i restorani, kafe barovi, objekti brze hrane, muzeji, zamkovi, vjerski objekti, zabavne manifestacije, fontane... Dostupnost svih turističkih kapaciteta u prvom redu zavisi od osjećaja lične bezbjednosti pojedinca (posjetioca) na toj turističkoj destinaciji. Ukoliko se ne obezbijedi ukupna bezbjednost (tzv. stabilna bezbjednosna situacija), turistička destinacija koja ima vrhunske objekte smještaja i različitu drugu turističku ponudu, neće ostvariti svoj cilj, a to je da bude posjećena. Iz kretanja posjetilaca nastaju svi ostali benefiti na toj destinaciji. Ukoliko nema posjetilaca svi turistički kapaciteti će biti prazni i nemaju svrhu. Dakle, na ovaj način se bezbjednost manifestuje u turizmu.

„Objekti smještaja u prvom redu hoteli su mjesta gdje se okupljaju ljudi iz poslovnog svijeta, investitori, političari, mjesta gdje se organizuju: samiti, kongresi, konferencije, festivali, simpozijumi, forumi, seminari. Objekti smještaja ali generalno i turistički sadržaji spadaju u tzv. „meke mete” terorista jer imaju javni prostor, javne pristupne saobraćajnice, ukratko – profitno su orijentisani i kao takvi svima dostupni”[10].

Ta dostupnost zahtijeva i određeni nivo zaštite što znači da svaki objekat smještaja treba imati uspostavljenu službu bezbjednosti (fizičko-tehnička zaštita), sistem saradnje i obavještavanja sa zainteresovanim organima. Naravno, od državnih organa se očekuje opšta bezbjednost, ali na nivou objekata smještaja – bezbjednost je u stvari višedimenzionalna. Pored navedene službe bezbjednosti, postoje segmenti koji se odnose na bezbjednost hrane, protiv-požarnu zaštitu, zaštitu na radu, zaštitu i spasavanje, IT zaštitu, upravljanje sistemom „pametnih zgrada”, održavanje tehničkih sistema i sredstava koji svaki na svoj način djeluju protiv bezbjednosnih prijetnji.

BEZBJEDNOSNE PRIJETNJE TURIZMU I OBJEKTIMA SMJEŠTAJA

Kako smo vidjeli, bezbjednosne prijetnje su pojave sa štetnim efektima, realizuju se raznim metodima, a neposredni izvršioци krivičnih djela su teroristi ili „klasični kriminalci”. Jedan od metoda realizacije prijetnji je upotreba eksplozivnih naprava koje su uglavnom improvizovanog tipa.

Istorijski posmatrano, između 75 i 80% svih terorističkih napada su podmetanje *bombi* [1]. Eksploziv je lako nabaviti i relativno lako napraviti u kućnoj izradi. Pripremljene eksplozivne naprave se postavljaju na mjesta gdje se želi izazvati razaranje kao što su automobili, kafići, turistički objekti...

Izdvojićemo neke od značajnijih bombaških napada [1]:

- 26. februara 1993. godine kamion bomba je eksplodirao u podrumu Svjetskog trgovinskog centra u Njujorku kada je poginulo šest osoba, a preko 100 je povrijeđeno,
- 12. oktobra 2002. godine na Baliju u Indoneziji, teroristička organizacija Džama Islamia povezana sa Al-Kaidom izvela je bombaški napad, pomoću ručne i kamiona bombe, na jedan noćni klub pri tom ubivši 190 ljudi uglavnom iz Australije. Osama bin Laden je na jednoj traci dobijenoj marta 2003. godine rekao: „Australija je ignorisala naša upozorenja i probudila se na zvuk eksplozije na Baliju”,
- 11. marta 2004. godine u Madridu se dogodio jedan od najokrutnijih napada gdje je upotrebom deset bombi u međugradskom željezničkom sistemu ubijena 191 osoba i ranjeno oko 1.900.

Jedna od poznatijih svjetskih turističkih destinacija je Tajland koja je posjećena od turista sa svih strana svijeta. Kao takva destinacija često je meta terorista. Tako su se 11.08.2016. godine u mjestu Hua Hin dogodile dvije eksplozije. Već narednog dana 12.08.2016. godine dogodili su se teroristički napadi sa više eksplozija u ljetovalištima Surat Taniju, Puketu, Trangu. U Istanbulu se 09.12.2016. godine dogodila eksplozija blizu ulaza stadiona fudbalskog kluba Beşiktaş dva sata poslije okončanja utakmice, a meta napada je bio policijski autobus sa policajcima. Imajući u vidu da se preduzimaju mjere bezbjednosti prije, u toku i nakon završetka fudbalske utakmice jasno je da se u okolini stadiona očekivao veći broj policajaca, navijača i drugih subjekata.

Metodom *otmica* odvođe se lica putem sile ili prijetnje pri čemu je ugrožena sigurnost tog ili tih lica. *Uzimanje talaca* je provjereni metod terorista gdje se vlada ili neka organizacija primorava na neke ustupke i uslove koji se postavljaju. Taoci zatočeni u nekom objektu ili saobraćajnom sredstvu predstavljaju sredstvo trgovine sa državom.

Otimanje i skretanje vazduhoplova i drugih saobraćajnih sredstava je posebno interesantan metod djelovanja terorista. Tako su 1976. godine palestinski teroristi u Grčkoj oteli avion Er Fransa sa 246 putnika i 12 članova posade i potom odletjeli u Entebe, Uganda. Taoci su oslobođeni akcijom izraelskih komandosa 4. jula 1976. godine. Kada su druga saobraćajna sredstva u pitanju do sada najznačajniji primjer otmice broda dogodio se 1985. godine kada su četvorica Palestinaca otela italijanski brod „Akile Lauro” u Sredozemnom moru i ubili jednu osobu.

Međutim, i ostali objekti turističke ponude su mete terorista sa specifičnom upotrebom saobraćajnih sredstava. U francuskom gradu Nici 14.07.2016. godine posjetioci i građani gledali su vatromet povodom organizovanja manifestacije proslave nacionalnog praznika 14. jula. Jedna osoba je vozeći kamion težak 19 tona uletjela u okupljenu masu i gazila ljude u dužini od oko dva kilometra prije nego ga je policija ubila. U događaju su poginula 84 lica, a stotinjak je povrijeđeno.

Konkretnije, *oružanim napadima* učinioci ovih krivičnih djela dejstvuju na organe državne vlasti, u prvom redu vojsku i policiju, izvođenjem zasjeda, prepada, napadima na patrole i na izdvojene policijske punktove. Naravno, djeluju i na druge objekte kao što su stanovništvo, objekti smještaja (hoteli), javni objekti i objekti saobraćaja i sl. Pod oružanim napadima ovdje podrazumijevamo upotrebu vatrenog oružja sa ciljem ubijanja i onesposobljavanja ljudi. Oružani napadi se izvode pomoću ručnog automatskog i poluautomatskog oružja, artiljerijsko-raketnog oružja, a može se koristiti i hladno oružje.

U napadu u nacionalnom muzeju Bardo 18.03.2015. godine u glavnom gradu Tunisa poginule su 23 osobe od kojih su većinom bili turisti iz Evrope. Teroristički napad vatrenim oružjem dogodio se u ruskoj republici Dagestan na Kavkazu dana 30.12.2015. godine u trenutku kada je dvadesetak turista bila na terasi tvrđave Naryn-Kala. Na Korzici je 1990. i 1991. godine napadnut turistički kompleks od strane korzikanskih terorista koji su kao metu protiv vlade i opasnost za svoju kulturu prepoznali turizam, ali i zbog toga jer je ovaj kompleks strana investicija iz Italije za koju se sumnjalo da potiče od mafijaških fondova [3].

Dakle, terorizmom je ugrožena turistička privreda pa problem turističke bezbjednosti otežava činjenica da su turistički objekti postali mete napada terorista i ekstremista. Tako su novembra 2002. godine bombaši samoubice dovezli vozilo ispred turističkog centra u Mombasi u Keniji, izraelskog vlasništva, aktivirali eksploziv prilikom čega je ubijeno 12 ljudi, a 24. avgusta 2004.

godine oko ponoći žena bombaš samoubica je na domaćem avio letu iz Moskve detonirala eksplozivnu napravu što je izazvalo pogibiju 44 osobe. [1] Bombaš samoubica se 4. jula 2016. godine raznio u blizini Poslanikove džamije, u kojoj je sahranjen Prorok Muhamed, u Medini u Saudijskoj Arabiji. U njemačkom mjestu u Anzbahu u Bavarskoj, bombaš samoubica je 24.07.2016. godine je aktivirao bombu ispred restorana nedaleko od mjesta gdje se održavao muzički festival na otvorenom.

Pored do sada navedenih prijetnji izložit ćemo i druge prijetnje turizmu i objektima smještaja koje zbog pričinjene štete i svoje razornosti, privlače posebnu pažnju javnosti i turista. Pod drugim bezbjednosnim prijetnjama podrazumijevamo: požare, postavljanje eksplozivnih naprava i upućivanje lažnih dojava o njihovom postavljanju, krađe i jednu interesantnu prijetnju – puč koji nije česta pojava ali ima ne samo uticaj na ukupnu bezbjednost u nekoj turističkoj destinaciji već direktno utiče na ličnu bezbjednot turista u objektima smještaja kada je taj objekat meta napada pučista.

Požari u turističkim destinacijama tokom ljetnjih mjeseci su česti na otvorenom prostoru ali su posebno su opasni požari u objektima smještaja. U tabeli koja slijedi dati su primjeri požara u hotelima.

Tabela: *Požari u hotelima*

| <i>Datum</i> | | <i>Hotel</i> | <i>Lokacija</i> |
|--------------|--------------|---|---------------------------------|
| 1980. | 21. novembra | MGM Grand Casino (sada Balli's Las-Vegas) | Las Vegas, SAD |
| 2014. | 27. decembar | Hotel Belveder | zimski centar Zakopane, Poljska |
| 2014 | 09. februara | Ishraq al-Madinah Hotel | Medina, Saudijska Arabija |
| 2015. | 13. jul | Hilton Towers | Meka, Saudijska Arabija |
| | 31. decembar | Hotel Address Dawntown Dubai | Dubai |
| 2016. | 19. januar | Paris Ritz | Pariz, Francuska |
| 2018. | 20. januar | Jurostars David | Prag, Češka |

Prijetnja turizmu su i svakako postavljanje bombi i lažne dojave o podmetanju eksplozivnih naprava. Tako, zaposlene hotela „Molitor” u Parizu je 13.11.2015. godine pozvala nepoznata osoba i saopštila da je u hotelu postavljena bomba. Zbog dojave hotel je evakuisan. U hotelu je bila smještena njemačka fudbalska selekcija koja je imala prijateljsku utakmicu sa reprezentacijom Francuske. I u našem regionu dogodio se slučaj kada je policija 30.10.2015. godine u mjestu Janja blizu Bijeljine u Republici Srpskoj spriječila teroristički napad na hotel „Dalas”. Pregledom i pretresom ovog hotela pronađena je veća količina pripremljenih opasnih materija uključujući i eksplozivne materije, pripremljene s ciljem uništenja ovog objekta.

Da ni Crna Gora nije izuzetak u odnosu na ova dešavanja pokazuje primjer od 07.08.2005. godine kada je nepoznato lice u večernjim časovima nazvalo redakciju dnevnika „Vijesti” u Podgorici i tom prilikom saopštilo da je podmetnuta bomba u hotelu „Splendid” u Bečićima i da će tokom noći doći do eksplozije. Najava o podmetanju eksplozivne naprave uznemirila je posjetioce hotela „Podgorica” u Podgorici kada je recepcija ovog hotela dana 30.10.2015. godine primila dojavu da je u hotelu postavljena eksplozivna naprava. Izvršena je evakuacija gostiju, a protivdiverzionim pregledom policija je utvrdila da je dojava bila lažna. Slično ovom primjeru, turističkoj agenciji u poznatom ljetovalištu Sveti Stefan u blizini Budve javljeno je 09.09.2016.godine da je postavljena eksplozivna naprava. Policija je blokirala jedan dio turističkog mjesta u čijoj blizini se nalazi hotel „Aman” i na osnovu protivdiverzionog pregleda

utvrđeno je da se radi o lažnoj dojavi. Oba primjera o lažnim dojavama uznemirila su posjetioce Podgorice i Svetog Stefana.

Ozbiljniji slučajevi vezani za hotel „Splendid” dogodili su se 2005. godine kada su izvršena tri napada aktiviranjem eksplozivnih naprava. Naime, na hotelski kompleks u izgradnji „Splendid“ - Bečići, dogodili su se napadi dana 09.06. i dana 21.06. u ranim jutranjim časovima. Treći napad dogodio se dana 11/12.07.2005. godine eksplozijom eksplozivne naprave što je kvalifikovano kao diverzija. Da su bombe uobičajeno sredstvo napada pokazuje slučaj u Kolašinu kada je dana 17. 04. 2014. godine hotel „Bjanka” bio meta napada. Eksplozijom bombe pričinjena je materijalna šteta u spa centru hotela ali na sreću bez ljudskih žrtava. Prijetnja prepoznatljiva u turizmu je krađa kao krivično djelo protiv imovine. Nekoliko primjera u hotelu „Maestral” u blizini Budve to pokazuje. Tako je, dana 24.03.2013.godine italijanski državljani prijavio je mu je iz sefa u hotelu „Maestral”, nestalo 25.000 €, skupi muški satovi i zlatni nakit.

Interesantan je primjer od 18.09.2014. godine kada je u hotelu „Maestral” izvršena teška krađa na štetu guvernerke Narodne banke Republike Srbije. Naime, oko 05.00 h jedno lice se preko žardinjera popelo do balkona sobe u kojoj se nalazila guvernerka, ušlo u sobu, i otuđilo njene stvari. Policija je 26.09.2016. godine lišila slobode jednu osobu koja je pokušala na sličan način da izvrši krivično djelo u hotelu „Avala” u Budvi. Toga dana oko 02.00 h obezbjeđenje hotela „Avala” je primijetilo ovo lice kako se penje na balkone. Kasnije se ispostavilo da se radi o istom licu u ova dva slučaja i zbog specifičnosti načina izvršenja krađa na visokim spratovima ovaj slučaj je nazvan „Spajdermen”. Nešto kasnije, 23.10.2016. godine opet u hotelu „Maestral” je otkriveno da je iz sefa kazina ukradeno oko 50.000 € ali je ovom prilikom oštećen hotel „Maestral” jer je novac bio prihod od dnevnog pazara.

Na kraju, ali ne manje značajna prijetnja je puč koja nije česta ali po sadržaju i metodima djelovanja je veoma opasna jer je realizuju veoma obučeni pojedinci sa velikim resursima. Puč kao nelegalan vid osvajanja i zadržavanja vlasti „je posebno militantna forma državnog udara koji izvode isključivo nacionalne oružane snage”, a po njegovom uspješnom izvođenju vrhovnu vlast obavljaju vojna lica [9]. U novije vrijeme, puč je pokušao u ljetovalištu Marmaris u Turskoj 16.07.2016. godine, planiranim napadom na predsjednika Redžepa Tajipa Erdogana koji se nalazio na odmoru u hotelu „Grand Yazici Marmaris”. Jedna vojna jedinica, podržana helikopterima, imala je zadatak da uhapsi ili ubije predsjednika Erdogana ali je on neposredno prije napada evakuisan. Tom prilikom, došlo je do upotrebe vatrenog oružja ali niko od posjetilaca hotela nije povrijeđen.

ZAKLJUČAK

Turizam doprinosi razvoju privrede pa tako i ukupnim finansijskim prihodima. Prema UNWTO međunarodni dolasci turista rastu pa je turizam jedan od najvećih privrednih pokretača u svijetu. Međutim, bezbjednosne prijetnje kao što su terorizam ozbiljno ugrožavaju objekte za smještaj turista, samim tim i turističku privredu, a izbor objekata ugrožavanja zavisi od namjera i ciljeva nosioca ugrožavanja. To pokazuju brojni primjeri napada na hotele, restorane, vjerske objekte, muzeje, tvrđave... Dakle, različiti oblici bezbjednosnih prijetnji nanose turizmu i objektima smještaja ozbiljne posledice kako u ljudskim žrtvama tako i u ekonomsko-finansijskom smislu, padom globalne turističke proizvodnje. Najzad, turistička bezbjednost sve više uznemirava turiste, političare i turističku privredu. Ta uznemirenost, više nego ikada, objašnjava sve veću zainteresovanost naučno-obrazovnog sistema, globalnog i nedržavnog sektora za probleme bezbjednosti turističke privrede. Ukratko, potencijalna šteta turističke nebezbjednosti je

ogromna. Generalno, države kroz mjere antiterorizma i kontraterorizama na svojoj i izvan svoje teritorije moraju primjenjivati ofanzivne mjere u cilju odvratanja, sprječavanja i suzbijanja savremenog terorizma.

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EVALUATION OF TECHNICAL EFFICIENCY OF THE INSURANCE MARKET IN VISEGRAD GROUP COUNTRIES

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Abstract: *The aim of the paper is to estimate the technical efficiency of Visegrad Group Countries using the Data Envelopment Analysis. We employed the Data Envelopment Analysis model, namely non-oriented Slack-Based Measure model with variable return to scale to measure the efficiency of insurance market in Visegrad countries within the period 2009-2016. The insurance market in Visegrad countries has changed during the last two decades. Stable and efficient insurance industry is important to efficient economy. Therefore, the analysis of efficiency of insurance companies is important topic. We found that the average efficiency of insurance market in Visegrad countries was around 65-80%. There were differences in individual insurance companies and individual insurance market. The most efficient was the insurance industry in Hungary and Poland and the least efficient in Slovakia. The development of efficiency was almost stable, the efficiency decrease in 2012 and 2014. The reason of inefficiency was decrease in premium written and net income and the high level of costs.*

Keywords: *Insurance sector; Visegrad Group countries; Technical efficiency; DEA.*

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THE COMPARATIVE ADVANTAGE OF EU28 TRADE THROUGH THE LAFAY INDEX PERSPECTIVE

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Abstract: *EU28 is the one of the biggest trading blocks in the world having bilateral or multilateral relations through its international agreements, selling its products and services worldwide. Because of this perspective, it is rational to investigate if the EU28 has a comparative advantage or a comparative disadvantage with the rest of the world through its trade relations. The current paper wishes to examine and analyze the imports and export activities of the main trading block with 106 countries, leading to comparative advantages or disadvantages through the Lafay Index perspective. All those countries are classified based on geographical orientation in 8 groups. The statistical data for all of the countries is gathered from Eurostat based on the Standard International Trade Classification SITC9 and focuses on the main imports and exports of goods between the main trade block and the eight geographical regions. The data is processed through the Lafay Index methodology and interpreted. The conclusions that are going to be drawn from the statistical analysis are going to be formulated at the end hand-in-hand with certain proposals.*

Keywords: *EU28, comparative advantage, Lafay Index*

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DOES THE PERSONAL NATURE OF INDUSTRIAL BUYERS MATTER? KEY FINDINGS OF AN INVESTIGATION IN TECHNOLOGY-ORIENTED FIRMS

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Abstract: *Globalization and rapidly changing manufacturing processes are constantly challenging procurement departments in industrial firms in technology-oriented environments. As the complexity of the purchased goods and services in technology-firms is high the procurement departments play a key role when the overall operational efficiency and effectiveness has to be improved. Hence, the field of activity of each individual buyer in procurement departments range from e. g. building sustainable buyer-supplier relationships to awarding contracts to low-cost suppliers. Especially for technology-oriented industrial firms with an above-average real net output ratio which are acting in global markets the competitiveness depends strongly on their ability to source raw material, technological goods as well as industrial services in order to build and establish the best value-adding supply chains. Thus, the success is determined by the individual performance of professional buyers within the organizational buying process who are typically integrated in buying centers of procurement departments of industrial firms. Recent literature indicates that the individual performance of industrial buyers in technology-oriented settings is beside technical and methodical knowledge strongly influenced by their personal nature. For this reason many personality researchers focus their interests on the structure and concepts of a “professional nature”. Scholars agree on the fact that there are different factors specifying the nature of a person that may serve as meaningful determinates for classifying characteristics of personalities in professional environments. Consequently, more and more human resource managers and executives in today’s industrial firms rely on employee personality analysis to support the employee selection process and to optimize the resource allocation of the internal workforce. In front of this background and in the context of the procurement function of technology firms this contribution aims at reporting the key findings of personality characteristics of industrial buyers. Based on an adapted model built from existing scales and conceptual works of the “Big Five Inventory” a survey study was performed. The sample was drawn from the member data base of the “Austrian Federation of Materials Management, Purchasing and Logistics” on a cross industry basis. Data analysis was done by means of confirmatory factor analysis. The presented result – which is a small portion of a larg research project at Graz University of Technology – indicate that a dominant key characteristic of the professional nature of industrial buyers in technology-oriented environments is “conscientiousness”. This piece of research may contribute to management literature in the field of human resources management by indicating that paying particular attention to “conscientiousness” could help to hire the “right nature” of buyers in industrial firms. The findings may also be useful in practice to design individual education and training programmes for buyers in corporate purchasing departments.*

Keywords: *Human Resource Management, Industrial Buyers, Technology-oriented Firms.*

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FINANCIAL ASPECT AND ANALYSIS OF DYNAMICS OF PHYSICAL VOLUME AND PRICES

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Abstract: *The company's management strategy seeks to ensure long-term earning capacity as well as stable financial position, expressed by adequate liquidity and solvency. The basic task of the price policy as one of the key leverage management results is to determine the appropriate level of prices for each product individually, which in combination with other factors, the physical volume of production, or realization, the product range and costs, will bring the most favorable outcome in the period for which the business politics and within it the policy of prices is constituted. It is very important to know the dynamics of physical volume, as well as other factors and intensities, which influence some of them to create this policy in order to define price policy.*

Key words : *finance, production volume, prices, costs, business policy*

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OPPORTUNITIES AND LIMITATIONS OF IAS/IFRS FOR SMES

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Abstract: *Lately, Internationalization has been involving not only large enterprises but also small and medium sized businesses, which are numerous in Italy and in Europe. With the increasing recourse to international trade, it has become necessary to use a financial and economic communication based on a series of accounting regulations that could be generally accepted and understandable to a vast audience of stakeholders. The implementation of international accounting principles for small and medium sized enterprises definitely represents an accounting revolution, and the achievement of an important goal. Because of the new competitive atmosphere, enterprises, even small ones, cannot remain confined to domestic markets anymore, but they must aim to their own internationalization, which has become a must not only in order to acquire new market shares, but also to defend those already acquired. The IAS/IFRS standards and particularly those meant for SMEs make income statement and results reached by national companies comparable to those of the companies that operate in the global market and offer a more transparent type of information. The IFRS standards for SMEs derive from full IFRS standards with some simplifications, with the objective to promote the harmonization of accounts. The aim of this work is to highlight the numerous opportunities offered to SMEs during the homologation process, such as the possibility to access credit or investment capitals, since they are recognized an advantage at international level. However, we will dwell on the limitations posed by IFRS, such as the application related difficulties caused by the different purposes, recipients and evaluation criteria contained in the national set of rules (particularly in Italy).*

Keywords: *IAS/IFRS, small and medium enterprise, framework, opportunities and limitations.*

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PRIVATE FIRM VALUATION: MAXIMIZING THE ACCURACY OF SYNTHETIC MULTIPLES BY SELECTING THE OPTIMAL PEER POOL

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Abstract: *In valuing private firms using transaction multiples, peer transactions must be identified to generate the synthetic multiple forecast for the firm being valued. Among others, questions arise concerning the definition of the pool of which the peer transactions must be selected from. Generally, based on a regional categorization, the peer pool could be either defined in a broad way consisting of all countries taken into consideration or it could be defined narrowly consisting of countries with certain comparable transaction-related impact factors. Finding the “best” peer pool follows the basic assumption that the selection of the “best” peers leads to a higher accuracy of the synthetic multiple and lowers the valuation error of the forecast.*

Until date, to my best knowledge, minor related research only exists concerning public firm valuation. As it is widely accepted that the market for private firms differs from the public stock market and therefore valuation procedures applicable to the public stock market cannot be used directly and unchanged in valuing private firms, in line with redefining stock market peer selection rules, also the rules on peer pooling have to be adapted.

This paper investigates the procedure to optimally define the peer pool in valuing European private firms. The time period taken into consideration is January 1, 2007 as to December 31, 2016. The transaction data and the related firm data is extracted from ZEPHYR database and ORBIS database. First, I investigate which regionally defined peer pool the peers of firms in different countries should optimally be selected from and if the use of a more accurate peer pool significantly increases the accuracy of the synthetic multiple forecast. Second, I investigate if a closer definition of the peer pool (according to the country GDP, the country specific GDP per capita as well as simply the size of the market measured by the number of transactions recorded) significantly increases the accuracy of the synthetic multiple forecast. Finally, I investigate the existence of statistically significant differences between major industries.

All computations are based on the roll-out procedure to define the peer group, minimizing several accepted homogeneity measures (scaled prediction error, scaled absolute prediction error, scaled squared prediction error as well as the scaled natural logarithm prediction error) in combination with bias and error minimizing compression methods (arithmetic mean, harmonic mean, geometric mean, median as well as value-weighted mean). The statistical significance is measured using a nonparametric test procedure. To avoid distortions caused by the use of different multiples, all computations are based on the aggregated results of all major equity and entity multiples.

Keywords: *Peer Pooling, Peer Group, Business Valuation, Private Firm Valuation, Market Approach*

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RANKING OF MACEDONIAN BANKING SECTOR USING A SOFTWARE FOR MULTICRITERIA DECISION MAKING

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Abstract: *Regular monitoring of the banks' financial performances is necessary in order to prevent the occurrence of financial difficulties. Therefore, the intention of this paper is to provide a useful tool for monitoring and ranking Macedonian banking sector. Actually, in this paper banks on Macedonian financial market will be ranked, according to its financial performances using appropriate determinants. In order to achieve the above mentioned goal of paper, authors have decided to use Primary Estimation Tool (PriEST) as a software for multicriteria decision making, based on AHP (Analytic Hierarchy Process) method.*

Keywords: *banking sector, Macedonia, ranking, multicriteria decision making, software*

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LEADERSHIP AND MANAGEMENT OF INVESTMENT FUNDS OF MONTENEGRO AND OTHER COUNTRIES IN THE REGION IN TIMES OF THE INTEGRATION OF RESEARCH AND INNOVATION POLICY BEFORE THE IMPLEMENTATION OF NEW DIRECTIVES OF EUROPEAN UNION

Radovan Samardžić²²⁴

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Abstract: *The capital market in the Western Balkans region is in an evident crisis. For many years, there has been no significant shift in stock markets. Managements of investment funds are not able to significantly move and increase the capital, for which they were partly blamed for limiting legislation. Certainly, there is an inevitable new approach to increasing assets and adjusting for the implementation of new legal solutions on investment funds imposed by EU directives and recommendations.*

Laws on investment funds in the region were adopted 15 years ago, with some now harmonized (Croatia, Slovenia), and some are under preparation (Serbia, Montenegro, BiH).

As Montenegro has significantly embedded in the process of EU accession, it is necessary to harmonize national legislation with EU directives.

New solutions in the future work of EU investment funds are already being implemented or applied to EU member states.

In this paper, the focus will be on the management that manages investment funds and the challenges of new forms and methods of fundraising, innovative activities in new business conditions, the character and the way of innovative capabilities within the market development that has taken place in the country.

Keywords: *investment fund, investment units, net worth of the fund, mergers and acquisitions of funds, revision of the fund's financial reports, stock exchanges.*

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PENZIONI SISTEM U SRBIJI POD LUPOM NUŽNE REFORME – GDE SE DENUO DRUGI STUB PENZIONOG SISTEMA

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Apstrakt: Princip generacijske solidarnosti koji je zastupljen u javnom penzionom sistemu decenijama je neodrživ. Odnos broja penzionera i zaposlenih u Srbiji poslednjih godina gotovo je izjednačen, a prema najnovijim podacima Fonda PIO za 2017. taj odnos je 1:1,5, s obzirom da je u prošloj godini registrovano 1.720.435 korisnika penzije i 2.583.557 osiguranika. Stručnjaci iz ove oblasti su jedinstveni u stavu da za optimalno funkcionisanje penzijskog sistema odnos broja penzionera i zaposlenih treba da bude najmanje 1:3, zbog čega se u stručnoj javnosti početkom ne retko pokreće pitanje o održivosti penzijskog sistema u Srbiji. Socijalna kategorija penzija je jedna dimenzija, ali Srbiji od početka reformi 2005. god. kada je uveden 3. Stub penzionog osiguranja nedostaje ciljane ekonomske dimenzija penzionog osiguranja predviđena 2. Stubom. Živimo u ekonomskoj utopiji od iluzije da se nedostaci radikalnih reformi mogu nadoknaditi stalnim, sitnim kozmetičkim promenama zakonskih propisa. U modelu drugog stuba obaveznog penzijskog osiguranja sredstva pojedinaca nalaze se na individualnim računima zaposlenih. Drugi stub penzijskog osiguranja je dizajniran da čuva i akumulira novac zaposlenih u investicionim fondovima. Novac u fondovima se nalazi na ličnim računima zaposlenih sve do momenta odlaska u penziju. Osnivači fondova su banke ili osiguravajuća društva u privatnom ili državnom vlanistvu. Svaki zaposleni samostalno odlučuje u koji će fond investirati svoj novac. Fondovi mogu imati više investicionih opcija kao na primer one sa visokim, srednjim ili niskim rizikom investiranja. Autori će u radu govoriti o neminovnosti reforme penzionog sistema Srbije.

Ključne reči: penzioni sistem, reforma, Srbija

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MARKETING CONCEPT AND CUSTOMER SATISFACTION

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Abstract: *Satisfaction is a crucial element in the decision-making process of consumers, especially in repeated buying of products and services. It is a key in retaining existing and obtaining the potential customers. In marketing the satisfaction is connected with efforts to achieve consumer satisfaction with the purchase of products and services. From the consumer's degree of satisfaction depends repeated buying of product and service. In cases where consumers are not satisfied with the performed buying or product performance, they feel cheated and it is almost certain that they will use another product brands.*

Keywords: *marketing, marketing concept, customer satisfaction, brand*

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SPECIFIC FEATURES OF APPLICATION OF MARKETING IN NON-PROFIT ORGANIZATIONS

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Abstract: *Non-profit organizations have great significance for every society and it has become evident that they need a good marketing strategy in order to achieve their socially significant goals more successfully. In principle, the marketing strategies of profit and non-profit organizations do not differ, but their different goals, target groups and activities they carry out lead to a difference in the application of basic marketing tools. Therefore, the aim of this paper is to point out the specific features of the application of the marketing concept in non-profit organizations.*

Keywords: *marketing strategy, non-profit organizations, marketing tools*

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