

MILITARY TOURIST INSTITUTIONS WITHIN THE TOURIST OFFERS OF SERBIA

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Abstract: *Above certain comparative and competitive advantages and resources of extremely good quality, the Military Tourist Institutions in the Republic of Serbia have not been completely incorporated in the tourist offers of Serbia. The Military Tourist Institutions have a significant capacity regarding both room and board services and non-accommodation services at their disposal what makes an important factor relevant to any adequate positioning in both domestic and foreign tourist market. This study presents the current stage as well as the capacity of these military institutions and it is made with the purpose to influence their development and the development of their current locations which could hopefully result in their better positioning on both Serbian and world tourist stage.*

Keywords: *positioning, military institutions, tourism, tourist offers.*

INTRODUCTION

Since their establishment the Military Institutions have had a significant role regarding their defined activities within the Ministry of Defense and in the areas of their location. After the end of II World War and after equipping the army with new technology, arms and instruments, and due to the economic growth of the whole socialistic society, the social care for people employed by the Yugoslavian Army (JA), which would be Yugoslavian People's Army (JNA) afterwards, was conducted. Certain number of facilities was taken over from the Kingdom of Yugoslavia right after the war. These facilities were given to the Army management. Short after that there was a need for the construction of new tourist facilities and other capacities (restaurants, camps, spas, sports centers...) primarily for the purposes of improving social responsibility towards the Army employees and their families. Very popular locations providing all the guests with necessary rest and recreation were chosen. Over

the years many changes have happened both in the Army and the state which has influenced the changes in the very Military Institutions. Nowadays there are six Military Institutions within the Ministry of Defense. These Military Institutions operate by the principles of income generating and distribution of income. The Military Institutions within the Directorate for Living Standard Services, Department of General Logistics of Material Resources Sector of the Ministry of Defense, which have important tourist-catering capacities in all tourist clusters of Serbia and which as such can be a significant factor in the areas of their location, are going to be the subject of this study. Due to their capacities, the way they treat their guests and their environmental care, these Military Institutions have contributed a lot to the affirmation and development of tourism and they have enriched the tourist offers in Serbia. The study presents the capacities of these Military Institutions of Serbia which have not been fully acknowledged both by the management running them and local self-government despite excellent facilities at exceptional locations.

POSITIONING OF MILITARY INSTITUTIONS

As one of its priorities and the foundation of any future actions, the strategy of tourism development of the Republic of Serbia for the period from 2016 to 2025 includes determination of further development goals in accordance to real competitive position of Serbia in the tourism market, and in accordance to future trends and potentials in the field of tourism.

Product positioning in the tourism market represents the efforts of tourist firms to position their product in the tourism trade considering the requests of their clients- guests-tourists, and any actions undertaken by their competitors or any other local factors (Milisavljević et al., 2004). Every product or a brand takes a special position in consumers' mind in comparison to some other competitors and their products. Any product position comes as a result of judgments or opinions considered as important by consumers. Satisfaction of consumers' needs is the main precondition for any further cooperation between the consumer and the provider. In order to continue such cooperation one needs to meet consumers' expectations and keep them satisfied (Veljković, 2006).

For the purposes of easier positioning it is necessary to consider all the important elements of that process. Positioning as a process should connect any research on tourists' needs and requests, advantages and disadvantages of our competitive locations, as well as the strategic advantages of competence and resources of an organization (Milisavljević et al., 2004). Facility location itself is extremely important when positioning and firm business management is considered, which is the reason why this segment attracts special attention while choosing locations. Important factors regarding location selection are: the market and tourists' distantness, analyzing and recognizing the consumers, any competitors and their strengths, a facility (its size, purpose, categorization...), the capacity of products suppliers and services providers, the competence of local population, offers, the range of tourist attractions, the area and its organization, its accessibility (Čačić, 1998);

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It is certain than after the war had been finished Yugoslav People's Army (JNA) used certain experiences of the previous organization, The Army of The Kingdom of Yugoslavia, where they paid special attention to provision of services of personal character. Such services included different activities starting with catering organization, production of uniforms and, finally, development of military farms which distributed their products to the military restaurants, etc.

If we take a look at the historical and organizational development of Military Institutions since the end of II World War, we can divide this period into four sections:

- 1945-1968 during this period the state didn't pay any special attention to the development of total tertiary sector and, thus, the same was in the Army.
- 1968-1991-this period represents the golden age regarding the development and the business management of Military Institutions. These are the years that are remembered as the years of progress, development and prosperity of the facilities. The biggest military rest and recreation centers along the Adriatic Sea coast were built then as well as hotels, restaurants and all the accompanying facilities and services that made these capacities unique in Yugoslavia at that time. In all regions of the country Military Institutions¹ (MI) and Military Rest and Recreation Centers (MRRC)² were established. They ran their business following the budget principle.
- 1991-2006- this period is a very difficult period regarding the business of Military Institutions. At the beginning of the twenties, after great Yugoslavia and the Yugoslavian People's Army fell apart, functioning of the existing Military Institutions suffered a complete breakdown. All the employees' memories about previous successful business and prosperity are still vivid and fresh. Military Institutions, rest and recreation centers and their property came into position of the republics in whose territory they were located. At the beginning of the nineties some Military Institutions facilities were closed and they got a completely new purpose. The military Institutions that functioned on the territory of the state of Yugoslavia at that time (Serbia and Montenegro) were the following ones: 'Moraca' Military Institution (MI), 'Valdanos' MI, 'Boka' MI, 'Zabljak' MI, 'Dedinje' MI, 'Tara' MI, 'VrnjackaBanja' MI, 'Morovic' MI, 'Karadjordjevo' MI and 'Morava' MI. Because of the wars in the territory of the Balkans, and especially after the bombing of FRY (the Federal Republic of Yugoslavia), the status of Military Institutions was even more deteriorated and brought into an unenviable position. Further more during this period these military hotels and their other tourist capacities were starting to advertise their tourist offers and arrangements for ordinary citizens (civilians), for the first time they became opened to both civilian and foreign sector and they started their full market practice as well.
- Since 2006 up to now- The present Republic of Serbia has existed since 2006 as such. Due to the disintegration of the Union of Serbia and Montenegro, the Military In-

1 MI 'Partizan' in Ljubljana, MI 'Romanija' in Sarajevo, MI 'Zvijezda' in Zagreb, MI 'Dalmacija' in Split, MI 'Ribnica' in Titogradat that time, MI 'Nisava' in Nis, in Belgrade -MI 'Topcider', MI 'Dedinje', MI 'Avala' and MI 'Jedinstvo', and in Skoplje- MI 'Vardar'

2 Military Facility 'Kupari', MF 'Duilovo', MF 'Ostrvoveca', MF 'Fazana', MF 'Valdanos', MF 'Tara' and MF 'Breza'

stitutions were shared between the newly formed states depending on whose territories they were located. The Military Institutions that stayed on the territory of Serbia are: 'Morava' Military Institution (MI) with its head office in Nis, 'Vrnjacka-Banja' MI with its head office in VrnjackaBanja, 'Morovic' MI with its head office in Morovic, 'Tara' MI with its head office in BajinaBasta, 'Karadjordjevo' MI with its head office in Karadjordjevo and 'Dedinje' MI with its head office in Belgrade. Within this period these institutions have been constantly in the state of transition 'attempts', stagnation period and decline of profit along with the falling number of tourists and overnight accommodations.

Although it has been ten years since the last secession in the former Yugoslavia, the very positioning of these Military Institutions has not been given necessary attention. At the beginning of 2010 the number of Military Tourist Institutions was cut down from six to three in accordance to the decisions of the Ministry of Defense and the previous Directorate of Tourism and Production was given a new name- the Directorate for Living Standard Services. Nowadays there are three Military Institutions functioning within the Directorate for Living Standard Services : 'Dedinje' MI, 'Tara' MI and 'Morovic' MI. Besides all the turbulent happenings these Military Institutions have a wide range of quality resources today. However it is necessary to enrich the existing tourist services with new attractive sports recreational, relaxation, entertainment and cultural events in order to insure a better position of the Military Institutions in the tourist market. Developing the quality and diversity of tourist services would greatly enrich the tourist offers of Military Institutions which would result in a larger number of domestic and foreign guests, their longer stay, as well as the increase of consumption which is generally the aim of all tourist destinations. Military Institutions represent significant economy subjects in all regions. We do not need to emphasize the importance of Military Institutions for the regions such as Tara, Morovic and Karadjordjevo. They are both important for the tourist offers of these regions and for the perspective of the whole area due to the fact that they represent the base for economy development of these areas.

TOURIST CAPACITIES OF MILITARY INSTITUTIONS

The tourist-catering facilities of Military Institutions were built to meet market criteria with emphases on tourist demands. Special attention was paid to the selection, category and location of the facilities. Besides the facility location and how it is equipped, it is always necessary to take into consideration a wider context of requested and possible tourist-catering offers as well as the very room and board and half-board offers of the institutions.

Military Institution hotels are open-type hotels and they follow the principle of room and board and half-board services. They are categorized by the Law of Tourism and by the Regulations book of classification, minimal conditions and categorization of catering facilities with two and three stars. The following table 1 presents accommodation capacities of Military Institutions within the commercial offers.

Table 1: Number of beds within the commercial part of Military Institutions facilities the year of 2015

Military Institution Name	Number of Beds
'Tara' MI	826
'Dedinje' MI	121
'Morovic' MI	82
TOTAL	1029

Source: *Military Tourist Institutions in the Republic of Serbia*

The Military institution 'Tara' contains many hotels, additional facilities related to hotels and restaurants. Nowadays in accordance to its location this institutions offers its products within the cluster of 'Western Serbia'. The hotels of 'Tara' Military Institution are located on Tara Mountain and in the most familiar spa resort of VrnjackaBanja. The facilities on Tara Mountain had been built at the beginning of the seventies (1973) eight years before Tara was proclaimed to be a national park. The 'Omorika' Hotel and the 'Breza' Hotel within the range of military institutions facilities are the best representatives of the hotels of Military Institutions. They are three-star hotels and they have suites, over 250 comfortable rooms, 700 beds with furnished and equipped rooms. Nearby the 'Omorika' Hotel there is an additional accommodation facility which has around 50 beds. The two-star 'BeliBor' Hotel, which is four kilometers away from 'Omorika' Hotel, uses the services of 'Omorika' Hotel as well in its offers. Neraby the 'BeliBor' Hotel there is a national restaurant called 'Radilovac' which is only open from May to October. There is also the 'Radmilovac' car-camp, which was completely arranged with all the necessary electric power grid, water supply grid and sewage grid. This camp is located in beautiful forests of Tara, however, it has been uncared-for and it hasn't been working since the beginning of the nineties. During winter period guests can use ski-paths which are located at an altitude of 1000 meters and not far from the 'BeliBor' Hotel. Guests skiers can use two ski lifts. One ski lift is 150 meters long and it is designed for children and less experienced skiers while the other one is 450 meters long and it is designed for people who ski for the purposes of recreation. Tourist and visitors have an inn, two cocktail lounges, a disco club, a cinema room, a TV room with satellite channels, a billiards room, a table-tennis room, three basketball fields, various trips organized by the 'Omorika' Hotel and other activities at their disposal. Besides all the mentioned facilities, there is also an additional accommodation facility called 'Sombor' which has 30 beds in 20 rooms. This facility is located in the center of VrnjackaBanja, 50 meters from the 'Breza' Hotel and it hasn't been working for a long time. In Kraljevo there is also a single person military hotel called 'Kraljevo' which has 45 beds in 20 rooms. This hotel is also in a bed condition and not exploited at all.

With its all capacities the 'Morovic' Military Institution is within 'Vojvodina' cluster and it has been promoted with a slogan 'Water treasure, Pannonian adventure'. The slogan completely depicts the location and the capacity of this military institution. This tourist offer provides guests with accommodation in villas called 'Srna' and 'Kosuta' and in five bungalows in Morovic. All these facilities are located in a large forest complex which is situated in a hunting district. The capacity of 60 beds which the 'Morovic' Military Institution has at

its disposal does not satisfy the needs and demands of any potential guests. The other part of the 'Morovic' Military Institution accommodation capacities is located in the economy of Karadjordjevo. Here guests can use 20 beds in 8 rooms. In Nikinci there is the 'Fruskogorac' Hotel which disposes of 37 beds in 15 rooms and which hasn't been working for some time already.

Due to its location the 'Dedinje' Military Institution belongs to 'Belgrade' cluster and it has impressing accommodation capacities as well as a range of offered services and activities which have been completely devastated, even partially ruined and left over to the influence of time and the negligence of the system. Apart from its commercial 'Bristol' Hotel which has only 120 beds, 'Dedinje' Military Institution has no other capacities that can be found in any commercial offer. This is an opportunity to remind ourselves of the golden days of the 'Dedinje' Military Institution when the 'Bristol' Hotel offered 400 beds in modernly equipped rooms in which world famous guests were staying. The most famous guest was the richest man of his time- Rockefeller himself. The 'Bristol' Hotel was built in 1912 and it served as a building for an insurance company and credit company of Belgrade cooperative. The project for its construction was made by architect Nikola Nestorovic. Nowadays the building is a cultural monument under protection of the Institute for Protection of Cultural Monuments of the city of Belgrade. Along with some other architectural wonders of Belgrade, the building represented a symbol of the birth of a modern city at that time. Within its commercial offers the 'Bristol' Hotel offers 'Rockefeller' suite(Rockefeller stayed in this suite during his visit to Belgrade)which is furnished with classic furniture dating from the first half of 20th century along with crystal chandeliers. There is another suite called golden suit in this hotel. This suite has gilded mirrors and furniture, Persian carpets and blue velvet curtains. Due to its interior, the hotel, besides its neglected appearance, seems like a place where time has stopped and a place where one can go back in time. Therefore the hotel is sometimes used by the movie industry nowadays. The entire interior of the hotel is decorated in order to resemble the period of the thirties in the twentieth century. This can be a significant tourist attraction in a modern city. It is important to indicate that there are some other capacities of the 'Dedinje' Military Institution which have not been acknowledged and properly positioned by the management and which represent the treasure of the capital city because of its locations and its capacities. Besides the 'Bristol' Hotel, there is a sports recreation center called 'Surcin' in Belgrade. 'Surcin' used to be a place for Yugoslavian sports representatives' preparations (football, handball, etc). Today it is one of the most neglected places in the city. If you make a tour around the center 'Surcin' you will be able to see its size and to assume the possibilities the center had. The whole area used to be fenced, it had wide streets, reception, a shop, impressive restaurants with many halls, a lake where one could go swimming, decorated and equipped bungalows and other sports related services. Today it is just a faded picture of the former grand center. The 'Surcin' facility has 162 beds in 22 bungalows (12 duplex houses). Above that, the 'Dedinje' Military Institution has a large number of single-person hotels under its authority. These hotels are in a very bad condition and they are closed and devastated, although they represent a great potential as they are situated on significant city locations. The hotels 'Galeb', 'Zvezdara' and 'Deligrad' have been working at barely half capacity and mostly in the cases of providing accommodation for military personnel from former republics. On the other hand, the additional accommodation facility 'Zvezdara' located in HadziMustafina Street in the center of Belgrade and the 'Dorcol' Hotel

in Cara Urosa Street have been closed since 2011/2012. All the analyses of the business management of the 'Dedinje' Military Institution have not given any credit to the 'Bristol' Hotel and they have not presented necessary data regarding the occupancy rate of the hotel and the work of the commercial part of the hotel. That way the management has not been able to recognize the treasure it has for some time and it has not been aware of the capacities of the mentioned facility. Within its commercial offers, the 'Dedinje' Military Institution has a certain number of representative restaurants thought out Serbia: Serbian Armed Forces Central House, Guards' House in Topcider, Serbian Armed Forces Club in Zemun, 'Knezev lad' restaurant, the restaurants in the houses of the Serbian Armed Forces in Pancevo, Nis, Vranje, Novi Sad and other facilities. All those mentioned facility are open-type facilities and they provide services to all types of guests.

Table 2 presents the total number of beds which are under the management of all military institutions and which could be a significant factor in tourist business in their regions and their exact locations only if there would be some reorganization and some investing. These capacities of the previously mentioned facilities have not been noticed and therefore the whole tourist market of Serbia has been impoverished.

Table 2: Total number of beds in Military Institutions facilities

Military Institution Name	Number of beds
'Tara' Military Institution	857
'Dedinje' Military Institution	1942
'Morovic' Military Institution	119
TOTAL	2918

Source: Military Tourist Institutions in the Republic of Serbia

The importance that is given to the development and improvement of military tourism in the region has been observed in the Czech Republic. The Czech Republic is a country that is the most similar one to Serbia by its size, population number and by the number of military members. However, apart from these similarities, along with the fact that both countries are continental, there are hardly any more similarities between them. Since 1993 and after the separation of Slovakia, the Czech Republic has become one of the most developed countries of the European Union today. The Czech Republic has become a country in which special attention is paid to tourism. Prague has become one of the inevitable tourist destinations and Czech spas are world famous. The Ministry of Defense of the Czech Republic established a Section for Rest and Recreation called 'Volareza' which includes 15 exceptionally equipped facilities (7 hotels- with 1032 beds; 6 spa centers and bathing resorts- with 682 beds; 1 vacation home center- with 160 beds and a children's camp). The 'Volareza' Agency was established in 1959 and it got today's legal form in 1993. The hotels are situated in all the large and main tourist cities and places of the Czech Republic, through out the country: Prague, KarloveVari, Ovcarna, Czech bathing centers and other places. In addition to this, the 'Volareza' Section is a member of the Liaison Committee of Social Military Organizations (CLIMS) of NATO. With this alliance the 'Volareza' has offered its capacities to all the members of CLIMS and in this way through the reciprocal exchange with the members it fills its vacancies at privileged prices which are valid for the military members of the Armed Forces

of the Czech Republic as well (in comparison to commercial prices, the prices have been decreased for about 15%).

Today the CLIMS Agency includes 12 countries (Germany, Belgium, Spain, France, Italy, Hungary, Poland, Portugal, the Czech Republic, Bulgaria, Romania and Greece). Lieutenant colonel Eduard Shtehlik is the director of the 'Volareza'. At the beginning of ten year he has announced the construction of new facilities and institutes for rehabilitation. The 'Volareza' offers its services primarily to present and former military members and the employees of the Ministry of Defense regarding traveling, family vacations or summer camps.

GEOGRAPHICAL-TRAFFIC POSITION OF MILITARY INSTITUTIONS

Advantageous geographical-traffic position and the accessibility of tourist military institutions, along with their locations, popular conditions (natural advantages, cultural and historical inheritance, etc.) and receptive conditions (regarding the stay at a certain destination- accommodation facilities, shops, sports facilities, facilities for entertainment, etc.), all together, make important factors that predetermine any favorable development of tourism in these locations and areas. The main transport route Corridor 10, which goes from Austria, through Slovenia and Croatia, Belgrade and Nis, continuing farther to Skopje and Thessalonica, and which is connected to a few other road transport routes (Budapest, Subotica, Novi Sad, Belgrade; Nis, Pirot, Sofia; Ibarska Highway towards the Adriatic Sea), is the main road network in Serbia. The Military Institutions are located along this network. 52 municipalities in Serbia are located along this road network, which in total makes 26% of the whole area of Serbia (Group of authors; 'Serbia and Contemporary Processes in Europe and the Council', Tara, 2005). The tourist map of the Corridor 10 mentions Morovic as a destination which should be definitely visited, as well as some other destinations nearby Karadjordjevo and Vrnjacka Banja.

Another thing that is of great interest to tourism development in Serbia is the railway route Subotica-Belgrade-Nis, Pirot, along with a part of international railway network. However, because of extremely bad railway infrastructure, tourists avoid this way of transportation despite its favorable prices.

The Corridor 7 navigation route (588 km) down the Danube is very important to tourism development. It is also very important to the areas that are the skeleton of the corridor: Posavina, Pomoravlje i Podunavlje. The Military Institutions in this corridor have their own significant capacities (Karadjordjevo, Belgrade) and, therefore, it is highly possible to develop nautical tourism, fishing tourism, and other tourist activities that have not been recognized at these destinations by the local tourist organizations and the Military Institutions.

The main characteristic of the hotels of Military Institutions is the fact that they are located by the busy traffic routes. The approach to the National Park 'Tara' and the hotels of 'Tara' Military Institutions is satisfactory to some extent and there are more approaches to the facilities: Bajina Basta-Perucac-Mitrovac (27 km), Bajina Basta-Kaludjerske Bare (16 km), Kremna-Kaludjerske Bare (9 km). Tara Mountain is located on the traffic corridor Belgrade-Uzice-Podgorica-Budva. Tara is 180 km away from Belgrade, 40 km away from Uzice, and 16 km away from Bajina Basta. On the other hand the bus transportation to Tara is poorly developed. There are direct bus lines but only to Belgrade and Novi Sad. In other cases tourists have to change buses in Bajina Basta or Uzice. The local road network and the roads that

separate from the Corridor towards the 'Tara' Military Institution are in a very bad condition (Vidric, 1987). The 'Breza' Hotel in VrnjackaBanja is extremely well connected to the local roads network and the primary roads. This way the hotel is very approachable to any guest. The location of VrnjackaBanja also contributes to this. VrnjackaBanja is placed in the central part of Serbia and the approach to the biggest Serbian health resort is good. It is possible to come to the health resort from three different directions: highway Belgrade-Nis (exit to Cicevac)-Krusevac-Trstenik-VrnjackaBanja; Uzice-Cacak-Kraljevo-VrnjackaBanja and a regional road Prokuplje-Brus-VrnjackaBanja. The bus transportation from and to VrnjackaBanja is well organized and there are direct bus lines towards larger towns in Serbia.

The 'Morovic' Military Institution is located along the Belgrade-Zagreb highway and it is well connected when road transportation is in question. Morovic town is 15 km away from Sid, which is its municipal center, 50 km away from SremskaMitrovica and only 5 km away from the highway from where it is only possible to approach the Military Institution. There are bus lines that go from Belgrade and Novi Sad to Sid. However, when the guests arrive in Sid they need to take a local bus or a taxi. The 'Karadjordjevo' Economy is located in Morovic as well, in the south-east part of Backa, in BackaPalanka Municipality; more precisely it is 10 km away from BackaPalanka to the north-west, a little bit more than 80 km away from Belgrade and 50 km from Novi Sad. It is possible to come to this mystical and historical place from Novi Sad- BackaPalanka direction, from Belgrade down the highway to Ilok and BackaPalanka and by using a regional route Sombor-Odzaci-BackaPalanka. Bus transportation is poorly developed. There are direct bus lines from Belgrade to BackaPalanka and from Novi Sad to BackaPalanka. To go anywhere farther the guests have to rely on the local bus lines.

Most of the accommodation and catering capacities of the 'Dedinje' Military Institution is located in Belgrade which is the largest tourist center with the largest number of visits and overnight accommodations and which has, from the geographical and transport point of view, the most suitable location for tourism business. All these advantages regarding a successful tourism and catering practice have not been noticed by the management of the 'Dedinje' Military Institution. The 'Bristol' Hotel, which works poorly, is located close to the main railway station. The other accommodation facilities are empty and partially occupied.

All the Military Institutions in the territory of Serbia are poorly connected when air traffic is considered. The exception is the 'Dedinje' Military Institution. They have been planning to transform the 'Ponikve' military airport to a civilian airport for many years. That would definitely enrich the tourist offer and the connection to the tourist military facilities in the central part of Serbia, along with the existing road transport connections. The 'Ponikve' Airport is about 12 km away from the 'Omorika' Hotel, however, the separation of a part of the 'Ladjevci' Airport for commercial flights has not enriched and enhanced the tourist offer of Central Serbia. For now all the Military Institutions rely on the international airports in Surcin and Nis. Therefore most of the foreign guests use this way of organized transportation and in order to continue they use bus transportation to the 'Omorika' Hotel, the 'Breza' Hotel and the 'Morovic' Military Institution. The guests of these military institutions that use their own transportation face problems such as bad road signalization and notifications about the military institutions at all approaches, as well as bad road infrastructure and road notifications regarding cultural and historical sights, popular locations, churches, monasteries and similar places.

STRUCTURE OF USERS OF MILITARY INSTITUTIONS

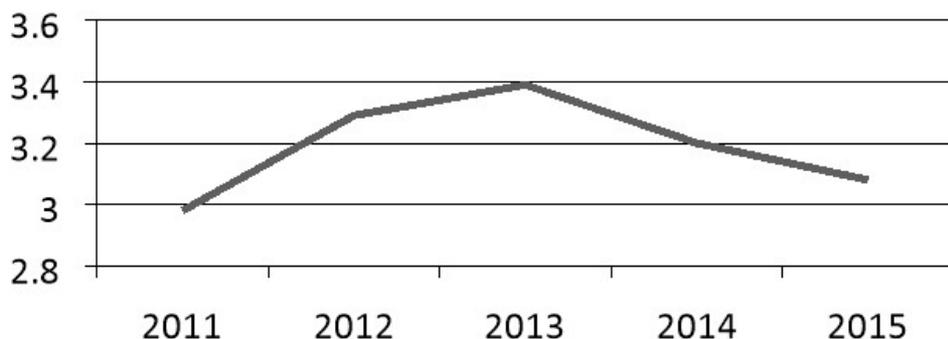
The Military Institutions Hotels are all open-type hotels and they provide room and board and half-board services. The facilities are open 365 days in a year and they are categorized by the Law of Tourism and the Regulations book of classification, minimal conditions and categorization of catering facilities. Although they were built over 30 years ago, these facilities-hotels of military institutions have a promising perspective due to their locations. However, they have not been modernized with any new popular tourist services and demands in accordance to the tendencies of the world tourism market. The facilities were built primarily for military members and their families and for the purposes of improving their quality of life. Before breakup of the Socialistic Federal Republic of Yugoslavia military members and their families made around 90 % of the total number of users and any chance for other people to stay at such facilities was considered a privilege. Because of the events that happened during the nineties and some disputable transitional changes in the tourism in Serbia, and for the purposes of staying in business, the Military institutions have changed their business practice and due to this the secondary guests have become the primary ones. For the purposes of observation of the general condition of the Military Institutions, a statistic data analysis is going to be presented in the continuation of this study. In accordance to previously given criteria, this analysis is going to deal with data dating from the period since the previously mentioned three Military Institutions were formed. The purpose of this analysis is to point out certain movements regarding occupancy and a relative participation of certain category of users.

Table 3: Number of provided room and board accommodations and number of users

Or. No.	MI Facilities	2011.		2012.		2013.		2014.		2015.	
		No. of users	No. of room and board accommodation	No. of users	No. of room and board accommodation	No. of users	No. of room and board accommodation	No. of users	No. of room and board accommodation	No. of users	No. of room and board accommodation
1	'Tara'	44.934	138.325	40.473	139.604	36.951	133.966	34.857	118.856	39.745	126.195
2	'Breza'	18.354	52.311	16.405	49.664	15.536	45.583	14.817	41.321	14.734	43.829
3	'Morović'	1.232	2.095	1.000	1.684	782	1.347	707	1.159	956	1.248
4	TOTAL	64.520	192.731	57.878	190.952	53.269	180.896	50.381	161.336	55.435	171.272
5	%of days of staying	2,98		3,29		3,39		3,20		3,08	

Source: Authors

In the period between 2011 and 2015, which is presented in the table, there is a decrease in the number of services users and in the number of provided room and board services. These negative tendencies were partially stopped in 2015 regarding the number of users and the number of provided room and board services. However, the number of days the guests stay at these facilities, which is a very important indicator, is still being decreased (*craph 1*).



Graph 1: Average number of days of guests' stay at military institutions facilities

The reasons to such trend are to be found in poor positioning of the Military Institutions in Serbia and abroad, and partially, in a poor material status of the citizens of Serbia because of which the citizens set aside less money for vacations, recreation and entertainment in comparison to some other needs. The data in table 3 should be considered in the context of table 4. Table 4 shows the number of realized half-board services during the period from 2011 to 2015 and it classifies the data by the structure of users (members of the Ministry of Defense (MD) and Serbian Armed Forces (AFS) members, citizens of the Republic of Serbia and foreign guests).

Table 4: Number of half-board accommodations classified by the structure of users

OrNo	Users structure	2011.	2012.	2013.	2014.	2015.	Structure in %				
							2011	2012	2013	2014	2015
1.	Members of MD and AFS	25.219	24.065	21.180	20.330	20.265	13	13	12	12	12
2.	RS citizens	152.470	149.518	143.569	128.765	141.097	79	78	79	80	82
3.	Foreign guests	15.042	17.369	16.147	12.241	9.910	8	9	9	8	6
4.	TOTAL	192.731	190.952	180.896	161.336	171.272	100	100	100	100	100

Source: Authors

In the period analyzed in the table, we can see constant decrease of realized room and board accommodations by the members of the Ministry of Defense and the Armed Forces of Serbia. This information is particularly concerning if we know the fact that this category pays 20 % lower prices in comparison to the process for other citizens and foreigners. Such decrease in the number of military users has been certainly influenced by the material status of the military members and, partially by the indifference of the Military Institutions management to pay necessary attention to this category of guests. If we take a look at the whole period, we can see the decrease of room and board accommodations in the category of the RS citizens and foreigners as well. The decrease of room and board accommodations used

by the citizens was partially stopped in 2015 but not completely, if we take into consideration the whole period and the fact that the RS Government made a decision about giving 5000 RSD worth vouchers for vacations in Serbia. The vouchers are provided to the RS citizens by the Ministry of Trade, Tourism and Telecommunications. A constant decrease of the number of foreign guests in the Military Institutions facilities is an especially concerning fact. Those guests who provide foreign exchange earnings to the Republic of Serbia have not recognized the Military Institutions facilities and their surroundings as places that should be visited.

Table 5: Average occupancy rate of Military Institution

Or No	MI	Number of standard beds	Possible capacities	2011.		2012.		2013.		2014.		2015.	
				Half-board	%								
1		1029	375585	192731	51	190952	50	180896	48	161336	43	171272	45
Average occupancy rate				47,4									

Source: Authors

The average annual occupancy of the capacities of the MI facilities has been constantly falling. Due to that the average annual occupancy for the period from 2011 to 2015 is only 47.4 %. The accommodations were occupied only during 170 days, which means that more than a half of the offered accommodation of the MI facilities was empty.

The 'Tara' Military Institution contains the Military Tourist Agency (MTA) which has excellent location, in Resavska Street. The capacities of MTA have not been either recognized or noticed. This agency gives information about the capacities and services of the 'Tara' MI. However, it is not even possible to make reservations for the 'Tara' at MTA and one has to make direct contact to the hotel. Further more, the Military Tourist Agency does not provide any information about the capacities of the other Military Institutions. The sites of these Military Institutions are not usually updated and they do not give you all the necessary pieces of information about the Military Institutions (prices, accommodation capacities, offered services, any services apart from room and board accommodation, etc).

This could be compared to the site of the 'Volareza' Agency. Its site is well organized and updated and it provides all the necessary pieces of information on its facilities, tourist offers, location, accommodation capacities and other services provided by the hotels. The 'Volareza' has 1874 beds at its disposal. Its hotels are certified by the Czeck System of Services Quality and they are all two-star hotels or three-star hotels. It is possible to make reservations at all facilities over the internet and the military members are provided with special form and regressive prices on the internet as well. In order to make a reservation every user fills out a form- an accommodation contract which includes different conditions for military members (such as compulsory advance payment, cancellation of reservation, discount for children under 12, special prices of any services apart from room and board accommodation) in comparison to other clients. All the services of the 'Volareza', such as family vacations, traveling or summer camps, are primarily offered to present and former military personnel and people employed by the Ministry of Defense. The following exam-

ple shows how crucial the standard is for choosing certain accommodation. A professional member of the Czech Armed Forces, together with two family members, and with the allowed subvention of 15 %, needs to spend 75 € per day in a hotel or a spa. On the other hand, in the 'Omorika' Hotel, a three-member family of a military employee should pay 80 € per day for a half-board accommodation with discount of 20 %. With reference to this one can compare the living standards of military members in Serbia and in the Czech Republic and it is noticeable that a major of the Serbian Armed Forces has a salary of 520 €, while a major of the Czech Armed Forces has a salary of 1740 € which is 3.5 times more in comparison to his Serbian colleague.

CONCLUSION

Tourist products of the Military Institutions are not well rated, they are not sufficiently developed and they are not commercialized enough in the tourist market of Serbia. The largest part of the tourist infrastructure of present Military Institutions relies on what was inherited in the last century, even before the eighties, when these facilities were built for the purposes of home tourist market. Despite a difficult economic situation and more and more competitive private sector, this tendency of occupancy decrease and insufficient use of all the capacities should be stopped. The main tourist products of the Military Institutions are not determined and they are not based on all products characteristic for their locations. The 'Dedinje' Military Institution has great possibilities for production of almost all tourist products (city interests, business interests, special interests, health care interest –in cooperation with the Military Medical Academy, events, etc). These great possibilities have not been noticed at all. On the other hand the 'Morovic' MI has a great location and areas of wild nature and despite that fact it has not been recognized as a great location for providing services of hunting and fishing, tours over Frushka Gora, river cruising, country tourism wealthy tourists' tourism, etc. Although one can conclude that the tourism of the Military Institutions has been in a state of steadiness and doziness for the last 30 years, there are certain strategic advantages that still exist. Making a general observation of the Military Institutions as a recognizable brand of the Ministry of Defense of the Republic of Serbia, one can see that there are great chances for the development of all tourist products of Serbia. These chances can be exploited by introducing new products under conditions of implementation of new development strategy which can reinforce strengths and possibilities and minimize any threats and weaknesses of these tourist destinations. This all would include complete understanding and support by all the elements of the society that take part in decision making. In addition the occupancy decrease by all types of users and insufficient use of all the capacities lead to a conclusion that it is necessary to undertake repositioning of the present services and to build any future strategy on the strengths and capacities of the Military Institutions. This study does not question the justifiability of the Military Institutions within the SAF but it questions whether the military institutions use all the available resources and whether the management has recognized them (from anthropological, natural and geographical-traffic to infrastructural capacities). With proper enrichment of the existing and the introduction of new products, along with adequate positioning, market segmentation, coherence within one tourist offer supported by the tourist organizations, necessary marketing and trained personnel, the Military Institutions would not have to worry about their future.

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