STUDY ON JOINT POTENTIAL OF HEALTH AND WELLNESS TOURISM DEVELOPMENT IN THE CROSS-BORDER AREA (SARAJEVO MACRO REGION AND TOURISM REGION OF WESTERN SERBIA)
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Author: Horwath HTL, Belgrade
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INTRODUCTION

Tourism Organization of the Western Serbia has announced open call for development of the Study on current state and potentials of the health tourism development in the cross border area Sarajevo Macro Region in Bosnia and Herzegovina (Ilidza, Fojnica, Olovo) and Zlatibor District in the Republic of Serbia (Uzice, Cajetina, Bajina Basta, Ivanjica, Arilje, Pozega, Kosjeric, Nova Varos, Prijepolje i Sjenica).

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CHAPTER 1

Global Trends in Health Tourism

STUDY ON JOINT POTENTIAL OF HEALTH AND WELLNESS TOURISM DEVELOPMENT IN THE CROSS-BORDER AREA (SARAJEVO MACRO REGION AND TOURISM REGION OF WESTERN SERBIA)
1 GLOBAL TRENDS

1.1 BASIC TERMINOLOGY REVIEW

At the beginning of this study, we believe we should introduce the review of basic terminology since there are different conceptual understandings and linguistic interpretations of the terms health and wellness tourism in different geographic markets of health and wellness tourism. Different countries as well as different organizations and associations use different terms in accordance with historical development of this type of tourism and adopted traditional practices. Namely, local practices and methods of health and wellness tourism have historically developed in accordance with local tradition and culture on the basis of the available local natural resources.

In Europe, the concept of health and wellness tourism has historically been based on the use of the following natural resources and medical factors for relaxation and rehabilitation: thermal waters and thalassotherapy in Western Europe, therapeutic mineral and thermal waters in Central and Eastern Europe, outdoor activities and recreation in Northern Europe, and Mediterranean climate and thalassotherapy in Southern Europe. In accordance with the historical development of health and wellness tourism and the applied traditional practices, the Republic of Serbia and the Federation of Bosnia and Herzegovina belong to the cluster of Central and Eastern Europe where the term health tourism is associated with the use of curative thermal and mineral springs primarily for rehabilitation. Therefore, in Serbia and the Federation of Bosnia and Herzegovina the use of the term “banja” has remained a part of historical heritage in tourism terminology. It is used for areas with natural therapeutic factors (thermal and mineral water, gas and therapeutic mud – peloid, whose medicinal properties have been scientifically researched and proven) and which have organized health practice, adequate accommodation capacities and other services. So, we can say that within the subject cross-border area, health tourism is understood as “banja” tourism associated with travel for rehabilitation/medical treatments for solving health problems/improving health conditions.

However, even though they are widely used, the terms spa and wellness tourism products have not yet been defined and adopted in the domestic tourism terminology. In the international tourism market, the wellness activities imply a wide range of activities aimed at creating harmony in the physical, mental and spiritual sense, and they are mostly associated with changes in the way of life and life habits. The term spa tourism in the tourism terminology of Central and Eastern Europe implies the use of thermo-mineral springs in spa medical centers (medical spa) which actually refers to “banja”, while the term spa centre in the Great Britain and U.S. markets may be interpreted as regular beauty salons. The International Spa Association (ISPA) has made a significant contribution to the categorization defining spas as “places devoted to overall well-being through a variety of professional services that encourage the renewal of mind, body and spirit”. The International Spa Association has categorized spas in the following way:
<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Club Spa</strong></td>
<td>Spa centers whose primary purpose is fitness activities, but they also offer a variety of professionally administered spa services on a day-use basis.</td>
</tr>
<tr>
<td><strong>Day Spa</strong></td>
<td>Spa centers offering a variety of professionally administered spa services on a day-use basis. They are mainly located in separate facilities and are not located within a hotel or resort. Most frequently they offer a wide range of facial and body treatments.</td>
</tr>
<tr>
<td><strong>Destination Spa</strong></td>
<td>Spa centers whose purpose is not just a spa services offer but also providing clients with an entire range of services for developing healthy life habits – for a complete lifestyle change. They provide comprehensive programs that include spa services, fitness activities, educational courses, healthful cuisine and special interests programming.</td>
</tr>
<tr>
<td><strong>Medical Spa</strong></td>
<td>Spa centers with the primary purpose of providing health and wellness services with competent health care professionals employed. The focus is on the medical component and on providing medical treatments. They offer treatments/therapies for the clients with health problems.</td>
</tr>
<tr>
<td><strong>Mineral Spring Spa</strong></td>
<td>Spa centers offering thermal, mineral and other sources of water used in hydrotherapy treatments.</td>
</tr>
<tr>
<td><strong>Resort/Hotel Spa</strong></td>
<td>Spa centers located within a hotel or resort providing professional spa services, fitness activities and other wellness activities.</td>
</tr>
</tbody>
</table>
For the purpose of this study, we will use the following scope of health tourism (including wellness tourism) and classification of health and wellness products:

**SPECTRUM OF HEALTH TOURISM**

<table>
<thead>
<tr>
<th>Wellness</th>
<th>Medical</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holistic tourism</td>
<td>Medical Wellness</td>
</tr>
<tr>
<td>Leisure and Recreation</td>
<td>Medical (therapeutic)</td>
</tr>
<tr>
<td>Medical (surgical)</td>
<td></td>
</tr>
<tr>
<td>Spiritual</td>
<td>Beauty treatments</td>
</tr>
<tr>
<td>Therapeutic Recreation</td>
<td>Illness related Rehabilitation</td>
</tr>
<tr>
<td>Medical</td>
<td>Cosmetic surgery</td>
</tr>
<tr>
<td>Yoga and Meditation</td>
<td>Sports and fitness</td>
</tr>
<tr>
<td>Lifestyle related Rehabilitation</td>
<td>Healing and Recuperation</td>
</tr>
<tr>
<td>Medical</td>
<td>Dentistry</td>
</tr>
<tr>
<td>New Age</td>
<td>Pampering</td>
</tr>
<tr>
<td>Occupational wellness</td>
<td>Surgical procedures</td>
</tr>
<tr>
<td>Thalassotherapy</td>
<td></td>
</tr>
<tr>
<td>Nutrition and detox programs</td>
<td></td>
</tr>
</tbody>
</table>

**TYPES OF HEALTH TOURISM FACILITIES**

- Retreats
- Spa Centers
- Hospitals and Clinics
- Ashram
- Hotels and Resorts
- Festivals
- Leisure Centers
- Cruisers

Source: Spectrum of Health Tourism, Melanie Smith & Laszlo Puczko
So, health tourism is divided into two main subcategories: wellness tourism and medical tourism. Wellness tourism is related to healthy guests who travel in order to get treatments that help them maintain their physical, psychological and spiritual health status. Medical tourism encompasses rehabilitation related to curing a certain illness as well as more complex medical procedures such as surgeries performed in order to cure an illness and as cosmetic interventions. The term medical wellness is used in Germany, Hungary and Slovenia and it is used for guests who are not ill and who travel in order to improve their health condition through wellness activities but with supervision of medical specialists.

In the global market, health tourism is mostly associated with the spa industry using water-based treatments. European spa centers have developed mainly by using thermal and mineral springs and other natural factors for the purpose of health improvement, most of all, the physical health condition. Many spa centers have a long tradition in the European market dating back to Roman times such as Baden Baden in Germany, Vichy in France, Spa in Belgium, Bath in Great Britain, etc. Traditional, inherited forms of health tourism (hydrotherapy, thalassotherapy, climate therapy, etc.) are characteristic for the spa centers in the European market. According to the European Spa Association the following natural factors are considered curative: healing water springs for therapeutic use, gases with healing properties, spa centers and health resorts on the sea coasts, peloids, “healing” climate and kneipp therapy.

However, over the last 20 years, spa centers in the European market have gone through concept restructuring and market repositioning and in accordance with the contemporary trends in the market they are more and more turning away from the traditional primary health and medical focus towards the leisure and relaxation activities.
1.2 GLOBAL MARKET TRENDS

Given the fact that the spa industry is one of the most developed segments of health tourism, and the most relevant for this study, we will proceed by presenting the review of main trends in the global spa industry market.

The International Spa Association (ISPA) is actively researching the global spa industry and it has provided the following key trends in the spa industry:

- About 200 million active spa-goers globally including the data from 11 countries recognized as the countries with the developed spa industry;

<table>
<thead>
<tr>
<th>Country</th>
<th>Active spa-goers in % of the overall population</th>
<th>Number of active spa-goers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>21%</td>
<td>4,5</td>
</tr>
<tr>
<td>Austria</td>
<td>42%</td>
<td>3,5</td>
</tr>
<tr>
<td>Canada</td>
<td>23%</td>
<td>7,7</td>
</tr>
<tr>
<td>France</td>
<td>10%</td>
<td>6,2</td>
</tr>
<tr>
<td>Germany</td>
<td>30%</td>
<td>24,6</td>
</tr>
<tr>
<td>Italy</td>
<td>39%</td>
<td>23,3</td>
</tr>
<tr>
<td>Japan</td>
<td>19%</td>
<td>24,3</td>
</tr>
<tr>
<td>Singapore</td>
<td>68%</td>
<td>3,3</td>
</tr>
<tr>
<td>Spain</td>
<td>37%</td>
<td>16,9</td>
</tr>
<tr>
<td>Great Britain</td>
<td>25%</td>
<td>15,3</td>
</tr>
<tr>
<td>USA</td>
<td>23%</td>
<td>70</td>
</tr>
</tbody>
</table>

Source: ISPA, 2008 Global Consumer Study

- European, countries with the highest number of active spa-goers (percent of total population) are: Austria (42%), Italy (39%), Spain (37%), Germany (30%) and Great Britain (25%);
- Active spa-goers are mainly women (70 %+);
- Women as active spa-goers are mainly in high management positions;
- Increase in the number of men visiting spas in the recent years;
- The families with children market segment. so-called “baby boomers” is a dominant market segment in the global spa industry – 60% of spa goers fall into the 30-49 age group;
- Decrease in older spa-goers has been identified in the past few years;
- Increase of young (younger than 30) spa-goers has been identified;
- The most popular treatments for women are massages and beauty treatments and the most popular treatments for men are saunas, steam rooms, fitness facilities and massages;
Main motives for visiting spa centers are: stress relieving, desire for a short-term indulgence, improving health conditions, leisure and relaxation, and complete relaxation (pampering);

As for the most popular services and treatments in the global spa industry and the main motives for visiting spa centers, the similar research results were given by Coyle Hospitality Group (the research conducted in 2011):

**The most popular services and treatments**

![Chart showing the most popular services and treatments in the global spa industry.]

**Motives to go to a spa centre**

![Chart showing the motives to go to a spa centre.]

Source: Coyle Hospitality Group (Research "Priorities of Today's Spa Consumers")

The most popular services and treatments among active spa-goers in the global market are: massages, beauty treatments (body), meditation and activities leading to the mind, spirit and body harmony, beauty treatments (facials), exercise programs, hydrotherapies, etc;

The main motives of spa-goers for visiting spa centers in the global market are: relaxation/stress management, cosmetic treatments (hair, nails management), desire to improve appearance, skin care, etc.
## 1.3 KEY SUCCESS FACTORS

| Availability of resources for health tourism product development  (air, water, road infrastructure) |
| Quality and Quantity of accommodation and hospitality services |
| Specialized capacities and services for health treatments |
| Level of safety and hygiene of facilities and equipment |
| Renovated, improved and/or buy equipment and services in the last 5 years |
| Specialized and internationally recognized health specialist (doctors, nutritionist) and healing treatments offer. |
| Diversity of health tourism offer (transport + accommodation, hospitality services, treatments) |
| Quantity and quality of content, equipment and health tourism services. |
| Booking system for health tourism product. |
| Offer and level of complementary health services(yoga courses, relax, recuperation etc) |
| Existence of complementary tourism offer (animation, vents, night life...) |
| Quantity and quality of tourist information for health tourism product (catalogues, guides...) |
| Level of demand for health tourism product |
| Level of awareness and knowledge of potential clients on health tourism product. |
| Human capital with relevant knowledge, skills and professional approach. |
| Image of country regarding health tourism product. |
CHAPTER 2
Situation Analysis

STUDY ON JOINT POTENTIAL OF HEALTH AND WELLNESS TOURISM DEVELOPMENT IN THE CROSS-BORDER AREA (SARAJEVO MACRO REGION AND TOURISM REGION OF WESTERN SERBIA)
2 SITUATION ANALYSES

2.1 MARKET ANALYSIS OF SERBIAN SPAS

2.1.1 Spa Tourism Demand in Serbia

- According to total number of overnights and arrivals, spas ("banja") represent the leading tourism destination in the Republic of Serbia. Spas ("banja") accounted for 31% of the total overnights in Serbia in 2012, which represents a decrease in comparison with the previous year (34.7% in 2011).

![Number of overnights according to the type of tourism destination (2012)]

- Domestic visitors accounted for 41% of total domestic visitor overnights in the Serbian spas ("banja"), which represents somewhat lower share in total number of domestic visitor overnights in spas ("banja") when compared with the previous year - 2011;
Number of domestic visitor overnights according to the type of tourism destination (2012)

- Total number of arrivals in the Serbian spas (“banja”) was 347 thousand in 2012, and total number of overnights in the Serbian spas (“banja”) was 2.036 million nights, which represents a decrease of the number of overnights of almost 12% in comparison with 2011;
- At the same time, total number of overnights in 2012 hit its lowest level of the last 5 years;

The structure of overnights and arrivals in the Serbian spas (“banja”) shows that domestic visitors represent a dominant market segment in comparison with foreign visitors – foreign visitors...
accounted for only 6.6% of total overnights in the Serbian spas and only 10.7% of total arrivals in the Serbian spas in 2012;

- The average length of stay in the Serbian spas (“banja”) was 5.86 days in 2012, which represents a decrease in comparison with 2011 when the average length of stay was 6.15 days;

- Seasonality of arrivals and overnights in the Serbian spas (“banja”) indicates that the highest number of overnights was realized in August while the lowest number of arrivals and overnights was realized in February;

- Seasonality of arrivals and overnights shows that the best season in the Serbian spas (“banja”) is during the summer months while the weakest performance is achieved in the winter months;

Source: Statistical Office of the Republic of Serbia

- Participation of individual spas in total number of overnights in the Serbian spas (“banja”) in 2012 is illustrated by the following review:

The Leading Spas (“banja”) in Serbia (Overnights – 2012)

1. Višnjička banja 25%
2. Niška banja 10%
3. Soko banja 15%
4. Banja Koviča 8%
5. Mataruška banja 3%
6. Aranđelovac 3%
7. Prolom banja 4%
8. Gornja Trepča 5%
9. Vrnjačka banja 2%

Other spas 26%
The Serbian spas (“banja”) leading in the number of overnights in 2012 are: Vrnjačka Banja (25% of total overnights in the spas), Soko Banja (15%), Niška Banja, (10%), Koviljača Banja (8%), Gornja Trepča (5%), Prolom Banja(4%), and other spas.

2.1.2 Spa tourism offer in Serbia

- Total number of beds in the Serbian spas (“banja”) was 37,515 in 2011;
- Serbian spas have the highest number of beds in comparison with other tourism destinations - 29% of total number of beds in the Serbian tourism destinations as it is presented in the following chart:

Bed Structure per Tourism Destination (2011)

2.2 MARKET ANALYSIS OF BOSNIA AND HERZEGOVINA’S SPAS

2.2.1 Spa tourism demand in Bosnia and Herzegovina

- According to total number of overnights and arrivals, spas (“banja”) represent the least visited tourism destinations in Bosnia and Herzegovina. Spas (“banja”) accounted for only 5% of the total overnights in the Federation of Bosnia and Herzegovina in 2012, which represents an increase in comparison with the previous year (3% in 2011). The highest number of overnights was realized in Sarajevo as the capital city, Neum as a coastal town being in the second place;
Domestic visitors accounted for 14% of total overnights of domestic visitors in spas (“banja”) of the Federation of Bosnia and Herzegovina in 2012, which represents a significant increase of total number of overnights of domestic visitors in spas in comparison with the previous year, 2011 (9%);
Total number of arrivals in spas ("banja") of the Federation of Bosnia and Herzegovina was 10 thousand in 2012, and total number of overnights in spas of Bosnia and Herzegovina was 48 thousand nights, which represents a significant increase of the number of overnights of 78% in comparison with 2011;

The structure of overnights and arrivals in spas ("banja") of the Federation of Bosnia and Herzegovina shows that domestic visitors represent a dominant market segment in comparison with foreign visitors – foreign visitors accounted for 10% of total overnights in spas of the Federation of Bosnia and Herzegovina and only 8.3% of total arrivals in spas in the Federation of Bosnia and Herzegovina in 2012;

The average length of stay in spas ("banja") of the Federation of Bosnia and Herzegovina was 4.8 days in 2012, which represents a significant increase in comparison with 2011 when the average length of stay was 2.9 days;

2.2.2 Spa tourism supply in Bosnia and Herzegovina

Total number of beds in spas ("banja") in Bosnia and Herzegovina was 3.455 in 15 registered spas ("banja") in 2013;
2.3 Market Analysis of Health Tourism Offer in Cross Border Area

2.3.1 Key health tourism offer representatives in Western Serbia Tourism Region

<table>
<thead>
<tr>
<th>INSTITUTION:</th>
<th>THE SPECIAL HOSPITAL FOR THYROID GLAND AND METABOLISM ZLATIBOR, ĆIGOTA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical centre „Ćigota“ is situated in the center of Zlatibor surrounded by pine forest at the ideal 1000 m height above sea level. 30 Kraljeve vode Street , 31315 Zlatibor, <a href="http://www.%C4%87igota.rs">www.ćigota.rs</a></td>
<td></td>
</tr>
<tr>
<td>The year of construction:</td>
<td>1971.</td>
</tr>
</tbody>
</table>

**Capacity to provide Health/Medical Services**

| Local natural resources: (thermal and mineral water, air, gas and therapeutic mud – peloid) | air |
| Key areas of specialization | Complete diagnostics and therapy of thyroid gland disorders, diagnostics and therapy of cardiovascular diseases, osteoporosis diagnostics, therapy of children and adults obesity, diagnostics and therapy of skeletal joint system. |
| Medical personnel: | 11 doctors (10 specialists and 1 on specialization, 14 physiotherapist, 6 laboratory technicians, 35 nurses. |
| Treatments / Therapies | Radioiodine therapy; electrotherapy and kinesitherapy |
| Facilities / equipment | Biochemical laboratory, 2 gamma cammeras, 4 ultrasounds, Ergo Test, Holter TA, Therapy service department |
| Average number of patients: (annually and daily) | 1655 patients on stationary treatments annually and 120 patients on ambulatory treatments, daily |

**Capacities and Facilities**

| Accommodation | 187/ 350 ; 1/1 31 ; 1/F41 ; 1/2 78 ; 1/3 8 ; 1/4 2 ; 1/5 2 ; 1/6 1 ; APP 1/2 4 ; APP 1/3 |
| Restoraunts | 2/ 150 / 300 |
| Bars | 2 / 90 / 60 |
| Wellness / spa offer | Swimming pool , 2 saunas, 3 hydro-massage bathtubs, 3 massage rooms, fitness studio. |
| Other facilities: | Hair dresser, shop, library |

**Key Performance Indicators (2012)**

| Average annual occupancy rate: | 52% |
| Generated revenue | 310 817 000,00 RSD |
| Revenue structure (room, food, beverage, wellness revenue) | Sopstveni prihodi celokupno bez budžetskih prihoda. |
| Seasonality: (high season months and low season months) | High season: July, August Low season: March, November, December |
| Market segmentation: 1. Medical/rehabilitation, leisure / wellness guests , business guests 2. Foreign and domestic tourism participation rate | 1. medical/rehabilitation 40% business 40 % Wellness / ĆIGOTA 20% 2. domestic 78 % foreign 22% |
Institute Ivanjica is located in southwestern Serbia, and is surrounded by the forest-covered slopes of the Golić, Javor, Mučanj, Murtenica and Čemernica mountains. It lies 486 m above sea-level. 78 Svetosavska Street, 32250 Ivanjica

<table>
<thead>
<tr>
<th>INSTITUTION</th>
<th>THE SPECIAL HOSPITAL FOR REHABILITATION, INSTITUTE IVANJICA</th>
</tr>
</thead>
<tbody>
<tr>
<td>The year of construction:</td>
<td>1978.</td>
</tr>
</tbody>
</table>

### CAPACITY TO PROVIDE HEALTH/MEDICAL SERVICES

- **Key areas of specialization**: Rehabilitation of malignant diseases of adults and children (medical, psychological and social), anemia of various origins, respiratory diseases (bronchitis, asthma and emphysema), conditions following hip, knee, spine surgery and conditions after injuries to bones and joints-muscular system.

- **Local natural resources**: (thermal and mineral water, air, gas and therapeutic mud – peloid) climate (Area is declared as a nature park and is under UNESCO protection as a biosphere reserve).

- **Medical personnel**: 9 doctors (8 specialists and 1 on specialization), 21 physiotherapists, 4 laboratory technicians, 11 nurses.

- **Treatments/Therapies**: Electrotherapy, phototherapy, kinesitherapy, ultrasound therapy, hydrotherapy and thermotherapy.

- **Facilities & equipment**: All equipment is in accordance with Republic of Serbia and EU standards.

### CAPACITIES AND FACILITIES

- **Accommodation**: 108 rooms and 4 apartments.

- **Restaurants**: 2 restaurants (250 and 80 seats).

- **Bars**: 1 bar, 50 seats (and 2 open terraces, 50 seats).

- **Wellness/spa offer**: Swimming pool, sauna, fitness studio, billiards.

- **Other facilities**: Open sport courts (basketball, volleyball, handball, mini pitch), running paths and library.

### KEY PERFORMANCE INDICATORS (2012)

- **Average annual occupancy rate**: 75%.
**Situation Analysis**

**Potential Locations for the Development of Health/Spa and Wellness Tourism:**

- **Pribojska Spa**
  
  Rehabilitation Center situated in Pribojska Banja is under remodeling, and there are significant investments in Wellness center.
  
  The address: Pribojska banja Street, Pribojska banja 31330

### General Characteristics

<table>
<thead>
<tr>
<th>Surface area:</th>
<th>RH Center - 1600m², Wellness Center Pribojska Banja - 4.697m²</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability (road network):</td>
<td>Pribojska Banja is located at a tri-junction of Serbia, Montenegro and the Republic of Srpska and bordered with the municipalities of: Čajetina, Nova Varoš, Prijepolje, Pljevlja, Čajniče and Rudo. Situated 4km away from the Belgrade-Bar railway, at the 10th kilometer of the E-75 Belgrade-Užice-Podgorica highway.</td>
</tr>
<tr>
<td>Existing infrastructure:</td>
<td>RH Center – 1,600 m², Wellness Center Pribojska Banja- 4,697 m²</td>
</tr>
<tr>
<td>Spatial plans and development documents (including local economic development strategy/tourism strategies, master plans etc.):</td>
<td>Development plan documents are being prepared.</td>
</tr>
<tr>
<td>Property (public/private):</td>
<td>Diocese of Milešovo.</td>
</tr>
</tbody>
</table>

### Existing Natural Resources:

- **Termomineralni izvori:** (sastav, temperatura, protok, itd.)
  - Special features that make this Banja so unique are – the temperature of an old spring water is 37.5°C, Ph 7.2. Water belongs to category of oligomineral, alkaline, homeotherm sulphur waters and has no taste or smell.

- **Healing-water springs** (composition, temperature, flow rate, etc.)
  - The temperature of an old spring water is 37.5°C, Ph 7.2. Water belongs to category of oligomineral, alkaline, homeotherm sulphur waters, without taste or smell. Temperature of the new spring water is 35.7°C, Ph 7.6 and water belongs to category of oligomineral, alkaline, homeotherm and hydrocarbonate waters.

- **Altitude and climate:** (the highest and the lowest average annual temperature, altitude, average annual precipitation, insolation, etc.)
  - Pribojska Banja climate ranges from moderate to subalpine. Slightly cool, pleasant summers with average temperature of 18.9°C, while average winter temperature is -0.6°C. Average rainfall 775mm, maximum precipitation in June was 84mm and minimum in March was 46mm.

- **Other natural local factors:** (mud, medical gas, herbs, etc.)
  - Besides thermal springs, Pribojska Banja has deciduous and coniferous forests and herbs, that is why it is called an air spa.
**INSTITUTION:** THE SPECIAL HOSPITAL FOR REHABILITATION, ZLATAR

Special Rehabilitation Hospital Zlatar Nova Varos, is located in magnificent environment of mountain Zlatar in the southwest of Serbia on 1235 m above sea level.

The year of construction: 1977.

### CAPACITY TO PROVIDE HEALTH/MEDICAL SERVICES

| Key areas of specialization | Cardiovascular diseases, general rehabilitation: different forms of rheumatism, orthopedic diseases and traumatic conditions, anomalies in childhood, neurological diseases |
| Local natural resources: (thermal and mineral water, air, gas and therapeutic mud – peloid) | climat |
| Medical personnel: | 8 doctors (specialists), 1 physiotherapist, 5 nurses. |
| Treatments/Therapias | electrotherapy, kinesitherapy, laser therapy, magnetic therapy |
| Facilities & equipment | Cabinet for Kinesitherapy, Cabinet for laser therapy, Cabinet for magnetic therapy, Cabinet for cardiology, Laboratory for Functional Diagnostic |
| Average number of patients: (annually and daily) | 2,500 patients annually, average length of stay 10 days |

### CAPACITIES AND FACILITIES

| Accommodation | 350 beds |
| Restauraunts | 1 restaurant, 300 seats |
| Bars | 2 bars, 300 seats |
| Wellness/spa offer | swimming pool, sauna, fitness studio |
| Other facilities: | Congress centre, billiard, night club, open sport courts, mini ski lift |

### KEY PERFORMANCE INDICATORS (2012)

| Average annual occupancy rate: | 58% |
| Seasonality: (high season months and low season months) | High season: Jun, July, August, September, December, January; Low season: October, February |
| Market segmentation: 1. Medical/rehabilitation, leisure/wellness guests, business guests 2. Foreign and domestic tourists participation rate | medical/rehabilitation 70%; other 30%; domestic 80%; foreign 20% |
2.3.2 Key health tourism offer representatives in Sarajevo Macro Region

INSTITUTION: ILIDŽA SPA

Spa Hotel Terme **** is directly connected with the Ilidža spa and it is a member of spa and rehabilitation hotel company Ilidža Hotels, established in 1892, which consist of Hotel Hercegovina deluxe ****, Hotel Hungaria deluxe ****, Auto - Camp Oaza **** i restaurant Labud in national park Vrelo Bosne, located by the spring of the Bosnia River. All hotels are situated in Ilidža, in 40 ha area of the beautiful spa park with fountain. Spa Hotel Terme is 7 km away from the Sarajevo, 2 km from the international airport of Sarajevo, about 20 km from the Olympic mountains Igman and Bjelašnica and 3 km from Vrelo Bosne, one of Sarajevo’s most popular picnic spots.

The year of construction: 1972.

CAPACITY TO PROVIDE HEALTH/MEDICAL SERVICES

Key areas of specialization: All types of rheumatic disorders; Diseases, injuries and post-operative conditions of the locomotor system; Neurological, skin, gynecological and metabolic disorders and diseases.

Local natural healing resources: Sulphur thermo-mineral water, therapeutic mud, climate.

Medical personnel: 3 doctors (2 specialists of physical medicine and rehabilitation), 20 physiotherapists, 3 medical technicians, 1 laboratory technician, 3 receptionists.

Treatments/therapies: All classical and modern physiotherapy procedures, hydrotherapy and balneotherapy with sulphur thermo-mineral water.

Sadržaji i oprema: Reception, thermo, electro and magno therapies, kinesiotherapy, fitness, hydrotherapy, mechanotherapy (machines and tubs), sauna, swimming pools.

Average number of patients: About 36,000 patients annually and 80 patients daily.

CAPACITIES AND FACILITIES

Accommodation: Spa Hotel Terme: 220 rooms (91 double bed rooms, 85 with French bed, 18 single bed rooms and 6 apartments. Besides that, within the complex are two 4-stars deluxe hotels Hercegovina with 26 and Crystal with 28 rooms and hotel-apartment complex Oaza with 13 facilties and 52 rooms.

Restaurants: 3 restaurants with 400 seats.

Bars: 3 with 300 seats.

Wellness/spa offer: The construction of new facilities is in progress: sauna and fitness center. 2 swimming pools, fitness center, trim room, 2 saunas and massager rooms are available to patients/guests.

KEY PERFORMANCE INDICATORS (2012)

Average annual occupancy rate: 40%

Revenue structure: (room, food, beverage, wellness revenues) 95% generated revenues i 5% budget transfers.

Seasonality: (high season months and low season months) High season months: June, July and August; Low season months: January, February and March.

Market segmentation: 1. Medical/rehabilitation, leisure/ wellness guests, business guests 2. Foreign and domestic tourists participation rate 1. Medical/rehabilitation guests 30%, business guests 7% and leisure/wellness guest 3% 2. Foreign tourists 65% and domestic tourists 35%.
### FACILITY:
**PUBLIC HEALTH INSTITUTION, SPA-RECREATIONAL CENTRE AQUATERM OLOVO**

AQUATERM Olovo is located in city of Olovo, 56 km from Sarajevo in central part of Bosnia and Herzegovina.

| The year of construction: | 1972 / 1982 |

### CAPACITY TO PROVIDE HEALTH/MEDICAL SERVICES

| Key areas of specialization | Diseases of the joints, bones, and muscles, nervous system, gynecological diseases, diseases of the skin, blood vessel diseases, the effects of inflammatory processes in the abdominal cavity, chronic intoxication, diseases of the cardiovascular system |
| Local natural resources: | Thermal water 35.2° C |
| (thermal and mineral water, air, gas and therapeutic mud – peloid) |
| Medical personnel: | 2 doctors, 11 physiotherapist |
| Treatments/Therapies | hydrotherapy, electrotherapy, kinesitherapy, sonodynamic therapy, magnetotherapy |
| Facilities / equipment | Equipment for physical medicine and treatments |
| Average number of patients: | 3000 patients on stationary treatments, annually and 85 patients on ambulatory treatments |
| (annually and daily) |

### CAPACITIES AND FACILITIES

| Accommodation | 57 rooms (47/2; 10/3); 3 apartments |
| Restorants | 1; 330 seats |

### KEY PERFORMANCE INDICATORS (2012)

| Average annual occupancy rate: | 65% |
| Generated revenue | 1,750,000 KM |
| Seasonality: (high season months and low season months) | High season: Jun/September |
| Low season: December, February |
| Market segmentation: 1. Medical/rehabilitation, leisure/wellness guests, business guests | medical/rehabilitation 99%; others 1% |
| 2. Foreign and domestic tourist participation rate | domestic guests 100% |
On the right bank of river Dragača and on the slopes of Malkoč hill is located complex of the MRC "Fojnica" which consists of two institutions, New Hospital and Reumal.

The year of construction: Facilities of the New Hospital in 1967 and Reumal institution in 1981

Capacity to provide health/medical services

Key area of specialization: Inflammatory and degenerative rheumatism (articular, extra-articular and systemic rheumatic diseases), post-traumatic and post-operative conditions of the locomotor apparatus (traumatology, orthopedic, neurosurgery, reconstructive-plastic surgery), diseases and injuries of the central and peripheral nervous system, muscle diseases (hereditary and acquired), postural deformities (hereditary and acquired), children with cerebral palsy (Bobato concept), conditions after the acute myocardial infarction, conditions after cardiac procedures and coronary interventions and other chronic cardiovascular diseases in accordance with doctor’s diagnosis.

Local natural healing factors: (thermal and mineral water, air, mud, gas and therapeutic mud - peloid)
Thermal water, climate.

Medical personnel:
Full-time employees: 3 medical doctors, 10 specialist doctors, 5 specialized physiotherapists, 1 physiotherapist, 1 specialized nurse, 80 physiotherapy technicians, 25 medical technicians, 2 laboratory technicians, 1 RTG technician. External associates: 1 specialist in internal medicine, 4 internist-cardiologists, 1 orthopedic specialist, 1 microbiologist, 1 epidemiologist, 1 urologist, 1 specialist in medical biochemistry, 1 radiologist.

Treatments/therapies: Electrotherapy (magnotherapy, DDS, tens, interferent current, ultrazvuk,...); Hydrotherapy (pearl tubs, underwater massage, Haubard,...); Kinesitherapy, Thermotherapy, active physical therapies.

Facilities and equipment: Facilities: two indoor swimming pools, two trim rooms; Equipment: DDS device, ultrasound, tens, magnotherapy device, an ultrasound with interferent currents, interference current vacuum device, shortwave diathermy machine, laser, solux lamps, parafango kit, devices for electrostimulation of nerves.

Average number of patients: In 2012, there were 14,148 domestic and 2,209 foreign guests in the Centre, about 386 per day.

Capacities and facilities

Accommodation: In two institutions, Reumal and New Hospital: 1/1 rooms - 68; 1/2 rooms - 183; 1/3 rooms - 8; suits 1/5 - 5; apartments 1/3 - 11; apartments 1/2 - 2. Total of 520 beds.

Restaurants: Restaurant Reumal - 450 seats, restaurant New Hospital - 120 seats, restaurant Kamin 60 + 65 seats in the garden, restaurant Stara Banja 70 + 100 seats in the garden, A la carte - 90 seats and 50 seats in aperitif bar.

Wellness/spa offer: Two indoor swimming pools, two trim rooms, wellness center.

Key performance indicators (2012):
Average annual occupancy rate: 73%
Generated revenue: KM 9,386,616.29
Revenue structure: Generated revenues: KM 9,386,616.29
Seasonality: High season: from April to November, Low season: January, February, March and December
Market segmentation:
1. Medical/rehabilitation, leisure/wellness guests, business guests
2. Foreign and domestic tourists participation rate
1. Medical/rehabilitation 133,072 overnight stays - 95.70%, Business guests 946 overnight stays - 0.70% and leisure/wellness guests 5,068 overnight stays - 3.60%.
2. Domestic tourists 14,140 overnight stays - 86.50% and foreign tourists 2,209 overnight stays.
## 2.3.3 Analysis of joint health tourism offer in cross border area

### INSTITUTION

<table>
<thead>
<tr>
<th>Institution</th>
<th>Local natural healing resources</th>
<th>Key areas of specialization</th>
<th>Treatments/Therapies</th>
<th>Medical personnel:</th>
<th>Number of rooms</th>
<th>Number of bars and restaurants</th>
<th>Wellness/Spa facilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>THE SPECIAL HOSPITAL FOR THYROID, METABOLISM ZLATIBOR, ČIGOTA</td>
<td>climat</td>
<td>Nuclear medicine endocrinology physical medicine cardiology</td>
<td>Radiodine therapy, electrotherapy and kinesitherapy</td>
<td>11 doctors, 14 physiotherapists, 6 laboratory technicians</td>
<td>187</td>
<td>2 restaurants, 2 bars</td>
<td>Swimming pool, 2 saunas, 3 hydro-massage bathubs, 3 massage rooms, fitness studio</td>
</tr>
<tr>
<td>THE SPECIAL HOSPITAL FOR REHABILITATION, INSTITUTE IVANJICA</td>
<td>climat</td>
<td>Rehabilitation of malignant diseases of adults and children (medical, psychological and social), anemia of various origins, respiratory diseases (bronchitis, asthma and emphysema), conditions following hip, knee, spine surgery and conditions after injuries to bones and joint-muscular system</td>
<td>Electrotherapy, phototherapy, kinesitherapy, ultrasound therapy, hydrotherapy</td>
<td>9 doctors, 21 physiotherapists, 11 nurses, 4 laboratory technicians</td>
<td>108</td>
<td>2 restaurants, 1 bar</td>
<td>Swimming pool, sauna, fitness studio, billiards</td>
</tr>
<tr>
<td>ILUŽA SPA</td>
<td>Sulphur thermo-mineral water, therapeutic mud, climate.</td>
<td>All types of rheumatic disorders; Diseases, injuries and post-operative conditions of the locomotor system; Neurological, skin, gynaecological and metabolic disorders and diseases</td>
<td>All classical and modern physical therapy procedures, hydrotherapy and balneotherapy with sulphur thermo-mineral water</td>
<td>3 doctors (2 specialists of medical medicine and rehabilitation), 20 physiotherapists, 3 medical technicians, 1 laboratory technician, 3 receptionists</td>
<td>220</td>
<td>3 restaurants, 3 bars</td>
<td>Una and fitness center, 2 swimming pools, fitness center, trim rooms, 2 saunas and massage rooms are available to patients/guests.</td>
</tr>
<tr>
<td>PUBLIC HEALTH INSTITUTION, SPA-RECREATIONAL CENTRE AQUATERM OLOVNO</td>
<td>thermal water 35,2° C</td>
<td>Diseases of the joints, bones, and muscles, nervous system, gynaecological diseases, diseases of the skin, blood vessel diseases, the effects of inflammatory processes in the abdominal cavity, chronic intoxication, diseases of the cardiovascular system</td>
<td>Hydrotherapy, electrotherapy, kinesitherapy, sonodynamic therapy, magnetotherapy</td>
<td>2 doctors, 11 physiotherapists</td>
<td>60 rooms</td>
<td>1 restaurant</td>
<td>Swimming pool with thermo-mineral water</td>
</tr>
<tr>
<td>CENTER OF MEDICAL REHABILITATION FONIĆA</td>
<td></td>
<td>Inflammatory and degenerative rheumatism, post-traumatic and post-operative conditions of the locomotor apparatus, diseases and injuries of the central and peripheral nervous system, muscle diseases, postural deformities, children with cerebral palsy (Bobath concept), conditions after the acute myocardial infarction, conditions after cardiac procedures and coronary interventions and other chronic cardiovascular diseases</td>
<td>Electrotherapy (magnetotherapy, DSO, tens, interferent current, ultrasound...), Hydrotherapy (pearl tubs, underwater massage, Houbard...), Kinesitherapy, Thermotherapy, active physical therapies.</td>
<td>13 doctors, 5 specialized physiotherapists, 1 physiotherapist, 80 physiotherapy technicians, 25 medical technicians, 2 laboratory technicians, 1 RTG technician.</td>
<td>277 rooms</td>
<td>6 restaurants</td>
<td>Two indoor swimming pools, two trim rooms, wellness center</td>
</tr>
<tr>
<td>THE SPECIAL HOSPITAL FOR REHABILITATION, ZLATAR</td>
<td>Climat</td>
<td>Cardiovascular diseases, general rehabilitation, different forms of rheumatism, orthopedic diseases and traumatic conditions, anomalies in childhood, neurological diseases</td>
<td>Electrotherapy, kinesitherapy, laser therapy, magnetic therapy</td>
<td>7 doctors, 5 physiotherapists</td>
<td>150</td>
<td>2 bars, 1 restaurant</td>
<td>Swimming pool, sauna, fitness studio</td>
</tr>
</tbody>
</table>

**Note:** Inventory List of wellness offer and the List of thermo mineral springs in cross border area are in Annex 1

The analysis of key medical centres/institutions in the cross border region indicates:
CAPACITIES FOR PROVIDING MEDICAL SERVICES:

- **Key local natural healing factors** in targeted region are climate and thermo mineral water. In existing health centres/institutions thermo mineral springs are basically used for hydro treatments/therapies;

- **Key therapy areas in existing medical centres/institutions are in the fields**:
  - Physical medicine: (diseases and conditions after injuries to bone and joint-muscular system, rheumatic diseases, acute and chronic diseases of the locomotors system, sports injuries, etc)
  - Cardiology (cardiovascular diseases, conditions after an acute cardiac infarction and coronary surgery);
  - Neurology (diseases and injuries of the nervous system, children with cerebral palsy)
  - Endocrinology (metabolic diseases)

- **Key offer of wellness services in existing medical centres/institution covers**:
  - Weight- loss programmes
  - Anti stress programme
  - Anti stress programme;

Existing wellness programmes are mainly in medical wellness domain. Weight loss programme and Anti stress programme consists of different types of activities with medical supervision.

- Related to the Spectrum of Health Tourism on Global Market(from Chapter 1) following products (blue framed) are detected in targeted cross border area but the level of their development compared with international standard is different
KEY PERFORMANCE INDICATORS:

- Average annual occupancy rate in analyzed medical centres/institutions in targeted cross border area is between 40% and 75%;
- Average daily number of patients in analyzed medical centres/institutions in targeted cross border area is between 80 – 386 patients, and annual average number of patients is between 1,655 and 36,000;
- Seasonality (months with best/worst performances) is different among centres/institutions but generally better performances are during the summer season (June, July, August, September) and low season is in winter period (December, January, February, March);
- Market segmentation regarding tourists origin - In analyzed medical centres/institutions in targeted cross border area domestic tourist prevail (78% - 100%), with exception of Ilidza Spa where 65% of guests are foreigners.
- Market segmentation regarding tourist motivation - In analyzed medical centres/institutions medical tourist segment prevails. Wellness segment is relatively small (1% - 3%), with the exception of Special hospitals for diseases of the thyroid gland and metabolism Zlatibor, where wellness guests have 20% of the total overnight stays.
- The share of business guests is also relatively small (up 7%), except for the Special hospital Zlatibor, where business guests are entitled to as much as 40% of the total overnight stays

PERSONNEL STRUCTURE:

- In the terms of service delivery, there is significant space for improvement, both at senior management level and at the level of middle management and executive positions themselves. It is necessary to change the whole approach and orientation of the current system to the client oriented system.
- In the terms of the personnel structure advantage is the fact that professional medical personnel is always present and is an integral part of the offer. Taking into account the level of development of the health care system and the formal system of education of the medical staff, the current situation is an excellent starting point for further tourism content development (developing new products and improving the quality of services in the field of medical tourism, in order to deliver a unique experience).
- At the level of strategic management in the hospitals/institutions there is no permanent monitoring of trends and tendencies in the contemporary medical tourism market in order to define a vision for products development, product structure and its positioning in the market;
- Personnel at the level of middle management (F & B managers, spa managers, room division managers, etc.) is the key driver of offer responsible for the quality of services delivered and outcomes of individual departments. In this context, the problem of finding qualified staff responsible for the management of individual departments is most visible and presents the greatest challenge to a successful business. Bearing in mind that the formal education system does not provide this kind of staff, setting up adequate vocational training and professional development is key for market success (education and training system). Therefore, training in the field of the operating personnel, especially in the sphere of spa and wellness services, should be a high priority to solving;
- At the level of the service delivery, there is considerable space for improvement in the field of the "service culture" in the way of service delivery in relation to the demands of the modern guest (in accordance with standard operating procedures), which is on one hand a consequence of the shortcomings of the formal education system, and on the other hand, the lack of a
mechanism to strengthen the internal capacity. It is necessary to establish a system for continuously improving the technical skills and service delivery;

- In relation to the service quality standards, is the lack of examples of comparative practice (benchmark) that would serve as a framework for the restructuring and repositioning of existing supply - i.e. recognized international standards of quality in medical tourism should reach the further development deals.
2.4 ADDITIONAL TOURISM OFFER

2.4.1 Additional tourism offer in Western Serbia Tourism Region

The additional tourism offer elements of the region of Western Serbia are identified through the existing natural attractions, cultural heritage and local products in territory of the municipalities of Užice, Čajetina, Bajina Bašta, Ivanjica, Arilje, Požega, Kosjerić, Nova Varoš, Prijeplje and Sjenica.

The additional tourism offer elements, viewed through the prism of health tourism, can, to a certain extent, amend the offer available to tourists and make it more diverse and thus increase the overall effects of tourism and boost a feeling of satisfaction ie. positive experience for tourists. However, we must be cautious on expectations that additional offer, directly and to a great extent, affects the increase in demand of health tourism products and it should be seen as an addition or complementary offer to the main offer of health tourism products and services. In this context, the following additional tourism offer elements of the Western Serbia region were detected:

<table>
<thead>
<tr>
<th>Additional tourism offer</th>
<th>NATURE</th>
<th>CULTURE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Nature reserves / Protected natural areas</strong></td>
<td>National park Tara, UNESCO’s biosphere reserve Golija, canyon of the river Mileševka, Nature park Mokra Gora, Special nature reserve Uvac, natural monuments: Bjeluška potajnica (intermittent carst spring), Potpeče cave, Stopića cave, waterfalls of Sopotnica i Klokočevac, Nature reserves Jelova Gora and canyon of the Djetinja river</td>
<td>Spasojević’s tower in Brnjica, Turkish Han in Kosjerić, Jusufagić’s house in Prijeplje, Envera Musanbegović’s house in Prijeplje, Hadžipetrović house, Andra Stanić’s house and Jokanović house in Užice, Borisavjević house in Priboj, Mojković’s han in Kremina, Kajmakamija in Nova Varoš. Ethno parks: Teržić avlija (Teržić’s yard), Drvengrad (Kustendorf, Mećavnik), the Old Village of Sirogojno Medieval towns: Stari grad (Old town) in Užice, Solotuša town, Zlostup and Paramun near Kosjerić, Kovin, Mileševac, Severin, Klek, Oštrik and Sokolac.</td>
</tr>
</tbody>
</table>
When it comes to local products, they are identified as the local culinary specialties, which substantially complement to the overall tourism offer and make the destination memorable because they create a positive impression on tourists. Healthy food, as a brand of Western Serbia, which is offered to tourists in destination, can significantly raise the diversity and quality of the overall tourist offer of the region.

### 2.4.2 Additional tourism offer in Sarajevo Macro Region

The additional tourism offer elements of the Sarajevo macroregion are identified through the existing natural attractions, cultural heritage and local products in the territory of Central Bosnia, Ženica-Doboj and Sarajevo Canton.

The additional tourism offer elements, viewed through the prism of health tourism, can, to a certain extent, amend the offer available to tourists and make it more diverse and thus increase the overall effects of tourism and boost a feeling of satisfaction i.e. positive experience for tourists. However, we must be cautious on expectations that additional offer, directly and to a great extent, affects the increase in demand of health tourism products and it should be seen as an addition or complementary offer to the main offer of health tourism products and services.

In this context, the following additional tourism offer elements of the Sarajevo macroregion were detected:

- “City break” in Sarajevo, one of the largest demographic, cultural, administrative, business and political centers of the Federation of B&H, i.e. a country of Bosnia and Herzegovina;
- Mountain tourism, especially destinations related to Winter Olympic Games, like Bijelašnica and Jahorina;
- Natural resources (an overview of the protected natural areas is given in the table below);
- Cultural and historical heritage (an overview is given in the table below).

When it comes to local products, they are identified as the local culinary specialties like čevapi (Bosnian kebabs), burek (pie) and cheese, and some other noteworthy local dishes like native cakes.
and deserts which substantially complement to the overall tourist offer and make the destination memorable because they create a positive impression on tourists. Local wines and healthy food, which is offered to tourists in destination, can significantly raise the diversity and quality of the overall tourist offer of the Sarajevo macroregion and the whole Bosnia and Herzegovina.

### Additional tourism offer

<table>
<thead>
<tr>
<th>NATURE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Rivers and lakes</td>
<td>Lakes: Prokoško, Blidinje, Šatorsko, Boračko, Blatačko, Ždrimačka, Krenice, Paučko</td>
</tr>
<tr>
<td></td>
<td>Springs: Dobre, Crni izvor, Žuče, Miništa, Klokoča, Stavnje, Duman, Sturbe, Krušnice, Bregave, Tihaljine</td>
</tr>
<tr>
<td></td>
<td>Springheads: Vritošice, Bunice, Bune and Lištice</td>
</tr>
<tr>
<td>Nature reserves / Protected natural areas</td>
<td>Rainforests: Žuča-Ribnička and Plješevica</td>
</tr>
<tr>
<td></td>
<td>Forest area Masna Luka at Čvrsnica mountain</td>
</tr>
<tr>
<td>Gorges / Canyons</td>
<td>Gorges of Ujča, Čude and Miljacka</td>
</tr>
<tr>
<td></td>
<td>Canyons of the Neretva, Rakitnica, Vrbas and the Buna river spring and the Vritošica river spring</td>
</tr>
<tr>
<td>Other</td>
<td>Mediterraneum at Klek (dolomite area)</td>
</tr>
<tr>
<td></td>
<td>Peatland at Zvijezda (Djilda) near Vareš</td>
</tr>
<tr>
<td></td>
<td>Dolomite area of Vrtaljica near Konjic</td>
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<td></td>
<td>Hutovo blato (Hutovo mud) near Čapljina</td>
</tr>
<tr>
<td></td>
<td>Localities: Bajšakovac, Kručica, Tisovac and Bistričak</td>
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<tr>
<td></td>
<td>Kazani near Trnovo</td>
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<td></td>
<td>Hajdučka vrata at Čvrsnica</td>
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<tr>
<td></td>
<td>Sedimentary area around Kravice waterfall, Jajce waterfall and area in Martin-Brod</td>
</tr>
<tr>
<td></td>
<td>Waterfalls: Kravice, Kočuša, Šištice, Skakavac, two waterfalls at Plačkovac, Blihe, Bregava, Bučine, Srednji Buk, Očevje, Kožice, Veliki Slap, Štrobački Buk</td>
</tr>
<tr>
<td>CULTURE</td>
<td></td>
</tr>
<tr>
<td>Religious buildings</td>
<td>The Franciscan Monastery St. Catherine with valuable museum collection - Thracian horseman, the library offers rare manuscripts, art collection.</td>
</tr>
<tr>
<td></td>
<td>Decangular bastion, angular towers, cistern, small chapel</td>
</tr>
<tr>
<td></td>
<td>The Franciscan Monasteries, the Franciscan church of St. Mary</td>
</tr>
<tr>
<td></td>
<td>Necropolis with sarcophagi and tombstones, temple in Harmani</td>
</tr>
<tr>
<td></td>
<td>Vezirsko turbeta (Viziers turbe), Ali-beg’s mosque, Clock tower, Sulejmanija – Šarena džamija (Multi-colored mosque), Hadži Ali-beg’s mosque, Clock tower – the endowment of Mehmed-paša Kukavica</td>
</tr>
<tr>
<td></td>
<td>Baš-džamija (the mosque)</td>
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<tr>
<td></td>
<td>The first mosque from 1462.</td>
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<tr>
<td></td>
<td>An Orthodox church and school from 1539</td>
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<tr>
<td></td>
<td>Beg’s mosque</td>
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<tr>
<td></td>
<td>The Catholic Cathedral</td>
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<td></td>
<td>Church of the Holy Mother of God and St. Ilija</td>
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<tr>
<td></td>
<td>Seimen’s mosque and Sultan-Ahmed’s mosque and Madrasah in Zenica</td>
</tr>
<tr>
<td></td>
<td>The Basilica in Breza, the oldest Roman church between 11th and 12th centuries and Gothic church from 14th century in Visoko.</td>
</tr>
</tbody>
</table>
**Other cultural and historical heritage**

- Kraljeva Sutjeska with the Franciscan monastery and St. Ivan Baptist church in Kakanj
- An orthodox metropolitan church
- Roman settlement in the area of Jajce
- Spelej (cave-temple) in honour of the God Mithra and catacombs - underground two-story burial places with several tombs
- The monument of Esma Sultan - mosque
- Musafirhana building next to the Travnik Gate and several monuments dedicated to World War II and the creation of socialist Yugoslavia
- Prehistoric city in Podastinje and ancient settlement in Višnjica with late Roman basilica, baptistery and stone reliefs
- Alihodža – prehistoric building
- Palačište – the Roman villa and numerous archaeological sites like Veliki Mošunj, Mali Mošunj and Čipuljić
- Several buildings dates from the Turkish period; stone bridge, clock-tower
- Archaeological sites Debelo brdo, Soukbunar and Zlatište
- Romanesque capitals on column
- Turkish bath Hamam, the first stone bridge on Miljacka, caravanserai, Clock tower, bulwarks, city gates and towers Širokac, Ploča and Višegradska gate; The National Museum of Bosnia and Herzegovina
- The Museum of city of Sarajevo, the Museum of the Old Orthodox Church in Sarajevo with the collection of icons, illuminated manuscripts, liturgical objects, Thermal spa complex, several housing units, villas, hypocausts baths adorned with rich patterned mosaics, Apolon Taden temple.
- City Museum of Zenica
- Arnautovići – prehistorical site
- Biskupići – founder’s plate – charter of Kulin ban
- Bobovac medieval town (Vareš)
- Archaeological localities in Kakanj
- Steći (stečak) – medieval tombstone necropolis

**Villages / Cities**

- Sarajevo - "City break"

**EVENTS**

- SFF - Sarajevo Film Festival
- Sarajevo Winter
- Kids Festival
- Sarajevo Jazz Festival
- BIMF – International Music Festival
- Nights of Baščaršija
- Sarajevo Ballet Festival
- The Melodies of Mostar
- MESS – International Theatre Festival
- International Folklore Festival
- Mostar Blues Festival
- Theatre Festival

Source: Strategy for Development of Tourism in the Federation of Bosnia and Herzegovina for the period 2008-201
All the available data taken from the Strategy for Development of Tourism in the Federation of Bosnia and Herzegovina and the available tourism presentations are given in tables, and refer to the Federation’s territory, the Cantons of Sarajevo, Central Bosnia and Zenica-Doboj. In our opinion, the additional offer elements, when it comes to different sites that are not in the vicinity of the destination or accommodation facilities within the spa centers, whether in terms of cultural and historical heritage, natural resources or city areas, should be defined only within a reasonable space-time distance, which, according to commonly standards of international practices, does not exceed 90 minutes away by bus or at a distance of 100km.

In defining the additional tourism offer, it should be borne in mind that all these sites does not have neither the same market position, nor equivalent level of general attractiveness.

In this regard, we propose that within the future marketing activities ie. development of the Strategic and operational marketing plan, all existing localities must be classified in accordance with their general tourism attractiveness into categories „A“, „B“ or „C“, where category „A“ implies a very high level of attractiveness, and category „C“ represents relatively low level of attractiveness.

When it comes to local products, primarily gastronomic products of the region, as part of the additional tourism offer, considering the specific characteristics of the health tourism, it should be kept in mind the products complementarity to defined core products ie. objectives of health tourism programme and therefore to be a part of the additional offer only if there is a sufficient level of complementarity.

Respecting this, we suggest that in cooperation with the health care providers, complementarity of the products must be determined during the process of defining the future health tourism products and expected marketing activities, ie. development of the Strategic and operational marketing plan.

### 2.5 REVIEW OF COMPETITION

In order to analyze the position of competition in the right way, first we need to identify the relevant market and analyze tourism products that market participants offer to that market. Generally, the relevant market is defined as market in which one or more goods compete. Therefore, the relevant market defines whether two or more products can be considered substitute goods.

According to the definition accepted by the European Commission2, the relevant market combines the relevant geographic market and the relevant product market:

1. A relevant geographic market comprises the geographic area in which the participants are involved in supply of products or services and in which the conditions of competition are sufficiently homogeneous.
2. A relevant product market comprises all those products and/or services which are regarded interchangeable or substitutable by the consumer by reason of the products’ characteristics, their prices and their intended use.

So, in order to conduct an accurate competitive analysis, we need to determine the relevant geographic market and the relevant product market in relation to the existing and potential geographic demand sources and specific tourism products of the tourism industry health segment in the subject cross-border area (Sarajevo macro region and tourism region of Western Serbia).
In order to conduct the competitive analysis in this report, and bearing in mind a great number of individual products and their interrelation but also the fact that only in a group can they create a sufficiently recognizable supply which can lead to demand, we will form three groups of the largest share of products characteristic for the health tourism in accordance with the motives creating the demand for them.

1) Medical tourism whose main characteristic is a direct medical intervention received by service users, where the intervention itself is the primary motive of travel or of purchasing the package of services that go with the intervention. This category includes both basic services in dentistry, cosmetic surgery, ophthalmology and significantly more sophisticated medical procedures such as open heart surgeries, transplantation of bone marrow, organs or even experimental treatments.

2) Rehabilitation or therapeutic tourism, which is closely related to medical tourism and can form a complementary package of tourism services with it in the sense of postoperative recovery, beneficial effects in the treatment of certain illnesses or conditions along with the modern medical treatments and interventions.

3) Wellness tourism whose main characteristic is prevention or maintaining health through stress reduction, reducing negative consequences of inappropriate dietary patterns and some other factors that affect our health and normal functioning of the human body in the contemporary world.

Bearing this grouping in mind, we will analyze the conditions of supply, i.e. we will provide the quality assessment of the current infrastructure and resource base as the basis for assessing attractiveness, i.e. determining the geographic coverage in the tourism market.

On the basis of the available information, we can conclude that the development of health tourism in Bosnia and Herzegovina and in Serbia is still at early stages in terms of the foreign market and it is completely functional at the national level due to the existing healthcare system that limits the private sector access.

Medical Tourism

In medical tourism, services that have been partially recognized as internationally competitive, especially in the regional context, are the ones in the areas of diagnostics, dentistry and ophthalmology, and plastic surgery has recently been developing its offer, too, at least within the Serbian market. Even though there is a relatively long list of both medical specialists and state institutions with a long tradition, more sophisticated medical interventions have not yet been commercialized in the foreign market, partly for the reason of the systematically disorganized space for action and consequently a small number of private practices which perform more complex interventions. At the same time the state institutions do not have a clear motivation system for participation in other markets, and their financial situation is not adequate in terms of access to the most modern equipment, machines and medical material needed for providing competitive services. Also, the state has a very passive approach towards the possibility of these services to enter the international market, which reflects most in the fact that there are no strategies and plans oriented to the internationalization of health care. Bearing all this in mind, we can conclude that apart from the simplest procedures in the areas of diagnostics, dentistry and partly ophthalmology and plastic surgery, there is currently no adequate offer that could be competitive in the world or European market. When it comes to the regional market, there is a certain level of competitiveness of a part of
these services since there are different levels of the quality and price of these services in the
countries of this region. There are also some specific factors that must be taken into account, such as
the fact that citizens of The Republic Srpska have rights to medical treatment in Serbia covered by
the basic health insurance, or very restrictive laws in the Republic of Croatia on in vitro fertilization.
In those segments, it is possible to have a more significant market penetration growth in the region
by using competitive advantages and the above-mentioned distortions.

The existing national health insurance system limits the growth of this market to a great extent since
none of the countries has enabled coverage i.e. refund for medical expenses in other countries of
choice of medical service users, apart from the case of providing emergency medical treatment,
which is followed by a relatively complicated administrative procedure prescribed by interstate
agreements regulating this area.

**Rehabilitation and Therapeutic Tourism**

Taking all this into account, we can conclude that rehabilitation or therapeutic tourism shares the
same fate of having a lack of plans and strategies, unresolved systemic-legal and ownership
relationships, new investments, etc. with medical tourism since it is closely related to medical
tourism and they form a complementary package of tourism services.

The basic limiting factor, when it comes to commercialization of this type of tourism services within
the region, is the fact that the national health care systems cover the health care expenses only for
certain services providers and within the national borders. So, there is no competition in the segment
financed by the health care system. However, in the segment financed by private sources, there is
competition and it is possible to increase market share either by being based on the existing market
position or by creating a new one counting on the real resource base. The other limiting factor is
condition of facilities and the levels of service which are mainly not in accordance with international
standards since there is a lack of systematic solutions and unfinished process of privatization as well
as relatively unsatisfying human capacities. However, a few examples such as the Ilidža Spa (“banja”)
in Sarajevo, show that it is possible for this segment to enter the world market and that the
geographic distance does not represent a significant obstacle.

**Wellness tourism**

Wellness tourism is the most commercial segment of all the observed tourism services and being as
such, it is most affected by competition. These facilities, which are usually the key ones in the
popular tourism destinations in the countries of Central and Eastern Europe, encompass a wide
range of products, services and attractions since they “communicate” to various target markets.
Most of the facilities with the international quality standards are located next to the newly opened
hotels. The location of these facilities clearly indicates that the quality development is mainly realized
in the tourism hotels located an hour drive away from the main administrative centers representing
the key market demand. However, the biggest inconsistency in this domain is seen with regard to
scope and quality of services as well as to comprehending what the wellness tourism products are in
comparison to the international market.

Due to geographical closeness of Serbia, Bosnia and Herzegovina, Montenegro and Croatia, these
markets represent the backbone of demand in the Sarajevo Macro Region and Tourism Region of
Western Serbia. Also, due to relative closeness, similarities of culture and language as well as inherited values of the local brands, other markets of the former Yugoslavia represent a relevant source of demand. Generally, under the present circumstances, Sarajevo Macro Region has a transportation infrastructure (Sarajevo International Airport) and regional road network well enough developed to enter the international market. At the same time, road links between Sarajevo Macro Region and the Region of Western Serbia represent a limiting factor for developing a unique offer to the markets outside the region. The region of Western Serbia is characterized by a significant transport and time distance from the international airports and main administrative centers so that the observed region can hardly count on a significant foreign tourist arrival outside the region. It will be significantly changed once the Belgrade-South Adriatic Highway is finished.

Generally, the subject territory of the Sarajevo Macro Region and Tourism Region of Western Serbia can hardly be competitive with the currently achieved level of competitiveness in the health tourism products development bearing in mind already developed and profiled tourism destinations in the wider region (Hungary, Austria, Slovenia, Slovakia, Romania, etc.).

Bearing all this in mind, we believe that the region can minimize the influence of the existing and potential competition only through a powerful marketing concept and positioning and a focused marketing plan and only then can it present itself to the market through unique and complementary products of medical, rehabilitation-therapeutic and wellness tourism.

We would like to emphasize that even though there is insufficient development of the supply quality in this segment, meaning that the majority of the existing facilities mostly offer low to medium quality and limited services, although there are the resource basis and market demand, there are still huge possibilities for investments and a fast penetration of the local and even regional markets.

Most countries in Europe have natural potentials for the health tourism development but their success depends on their capability and capacity to respond to the market demands and develop internationally competitive health tourism products.

Here is a review of several countries:

- **According to the German Spa Association** there are about 350 spa centers (including medical spa centre) in the German market. The German Spa Association recognizes the following categories: mineral and thermal springs, medicinal mud spa resorts, climate health resorts, seaside spas and resorts, Kneipp spa centers and health resorts, Felke and Schroth therapy resorts, spa resorts with radon therapy. There is also spa centers classification according to indications (fields of treatment and rehabilitation) and the spa centers location. German spa centers develop their supply based on two key components: local natural remedies and traditional remedial treatments. The German Spa Association has developed the quality seal Die Kur for spa centers with the highest quality standards in providing services. The German health care system, although confronting a decreasing trend, makes it possible for the insured persons to use the services of the medical spa centers;

- **Czech spa centers** belong to the traditional European spa centers based on the use of mineral and thermal water and medicinal mud. They offer therapies for the following indications: digestive system diseases, neurological disorders, respiratory system disorders, urinary tract infections, skin disorders, mental disorders, gynecological diseases, etc. The Czech Healing Spa Association brings together 43 members, a great majority of which are health spas, and the most famous ones are the spa centers with a long tradition such as Marianske Lazne (Marienbad),
Karlovy Vary (Carlsbad), Frantiskovy Lazne, etc. The first spa centre which got the EUROPESPA med certificate was the spa centre from Czech Republic. In order for a spa to get the medical spa centre status, it needs to be authorised by the Czech Ministry of Health in compliance with regulatory procedures;

- Slovak spa centers also belong to the traditional European spa centers with the resources similar to the Czech ones – mineral and thermal water and medicinal mud. Association of Slovak Spas brings together 26 members. They offer therapies for the following indications: oncologic diseases, circulatory system diseases, digestive system diseases, endocrine glands diseases, nervous system diseases, kidney diseases, mental disorders, skin diseases, etc.;
- There are also Hungary, Slovenia, Austria, Switzerland, Italy, France with a long tradition in health tourism. Most countries on the Balkan Peninsula have natural remedial potentials (thermal springs, favorable climate, caves, etc.). For instance, Romania has about 3,000 registered thermal springs and Bulgaria has about 800 thermal springs;
- Bearing in mind a relatively dynamic development of the health tourism products in the regional market, we can expect the growing competitive pressure from the neighboring countries in the following period.
CHAPTER 3

Regulatory Framework

STUDY ON JOINT POTENTIAL OF HEALTH AND WELLNESS TOURISM DEVELOPMENT IN THE CROSS-BORDER AREA (SARAJEVO MACRO REGION AND TOURISM REGION OF WESTERN SERBIA)
3 REGULATORY FRAMEWORKS

3.1 REGULATORY FRAMEWORK IN SERBIA

3.1.1 Strategic Framework in Serbia

The Tourism Strategy of the Republic of Serbia for period 2006 – 2015 recognizes health tourism (wellness/spa) as one of the priority products with the potential for international commercialization, unambiguously emphasizing the necessity of respecting the game rules and development standards on the international scene. The main characteristics of the spa/wellness products are the following:

- Spa/ wellness market is becoming a life style that will be based on a long-term approach to treatment and various therapies;
- The main clients of the spa/wellness products are individual guests and couples without children;
- Medically based programs (health treatments) represent the future of the spa/wellness products;
- The main distribution channels are internet, specialized agencies and tour operators;

The Strategy defines the difference between health and wellness tourism clearly indicating that health tourism is oriented to clients with different health problems who travel for therapies/treatments that will help them improve their current situation. Even though it is recognised that health tourism represents a significant category in the Serbian tourism, it is also clearly indicated that it is still oriented almost exclusively to the domestic demand. Additionally, it is recognized that the accent is on the health service quality while the quality of accommodation, hospitality and entertainment services is not so much emphasized and it currently does not satisfy the international demand criteria. On the basis of conducted evaluation of key success factors it can be stated that the current level of competitiveness achieved by Serbia in the health tourism domain is not particularly good. In that sense, repositioning of the present spa/health resorts (special hospitals) products through significant investments in production infrastructure and suprastructure has been suggested in order to attract interest of the international demand for the Serbian health tourism product.

The Strategy introduces the following Health Tourism (Spa&Wellness) product segments – health tourism product structure:

- Destination Spa – along with the classic professional spa services, the offer within this product segment includes practically all the fitness and wellness components which are offered in the total destination offer. Clients also have the opportunity to choose services that boost their immunity and improve their health. Along with the classic hotel accommodation, there is also a high demand for the private accommodation capacities;
- Medical Spa – represents a category with, according to some predictions, the best growth potentials in the next dozen years mostly because of a higher demand for the holistic medical treatments and therapies. The service is based on all known health and wellness components in the environment integrating classic and special treatments and therapies. In other words, this
health tourism product segment requires certain improvements, additions and adjustments of the Serbian spas present offer;

- **Mineral Springs Spa** – as a typical product in the European spa/wellness sector, this product segment is based on offering natural, mineral and thermal springs, i.e. offering various hydrotherapy treatments. This product segment requires relatively smaller scope of investments and has a potential for relatively fast international positioning when compared to the Serbian spa (“banja”) product;

- **Resort / Hotel Spa** – this product is the result of a large-scale international demand but also of the hotel companies and/or individual hotel owners’ efforts to increase their own profitability.

The **Medical Spa** and **Mineral Spring Spa** segments have high priority in the cluster of Southwestern Serbia where the Tourism Region of Western Serbia belongs, while **Destination Spa** and **Resort/Hotel Spa** have medium priority.

The Strategy also assessed the competitive products deficiencies and their influence/priority for solving. The highest priority is assigned to solving the following deficiencies:

- Inadequate accommodation capacities of quality improper for the health tourism development;
- Lack of alternative accommodation capacities and quality classification system;
- Lack of strategic guidelines and investments for accommodation capacities development and health tourism activities;
- Tourism demand is based on the domestic market and there is lack of management and promotion of the health tourism products;
- Low level of the hospitality sector supply and of the additional services for health tourism product;
- Bad infrastructure of the spa services and activities, outdated medical equipment, etc.;
- Bad road access and badly maintained roads represent a big problem for development of the health tourism products, especially in the rural parts of Serbia;
- Low quality level of public bus, train and taxi transport.

The potential for this product development lies in the fact that Serbia has a product that can satisfy the growing international demand for specialised health treatments. That is why adopting a competitive strategy based on differentiation and with a low cost offer has been suggested. A strong base of expertise in various areas of health rehabilitation has been clearly recognized and commercialization through inclusion in the state and private health insurances in the European countries was suggested.

The Model “Serbia – Health for Europe” was proposed as a state project of the Ministries in charge of tourism and health business. Given the unfinished process of privatization, it is necessary to adopt a unique model of restructuring and privatization of spas (“banja”). The destination value chain management followed by forming the public-private partnership was identified as the next step. In the context of formulating the action plan, the following components were proposed:

- Creation of a detailed plan to restructure all the individual spas according to the existing market, organizational, ownership and other aspects;
- Creation of a unique integral model of the Serbian spas privatization;
- Agreement of the key state authorities and institutions on the management model of restructuring and privatization of the spas;
- Redefinition of the Law on Spa centers and its regulations and support in infrastructure renewal;
- Creation of business plans and investment-privatization prospects for the Serbian spas cluster;
- A unique coordination in drafting the urban and regulation plans in the Serbian spas destinations;
- Establishment of a 'competitiveness club', or reshaping the role of the present Serbian Spa Association;
- Development of the Plan and program for improving the customer service quality (shifting the perception from seeing the customer as a patient to seeing the customer as a guest);
- Creating the system of quality and brand standards associated with the health tourism product and activities according to the product segments (Destination Spa, Medical Spa, Mineral Spring Spa and Resort/Hotel Spa);
- Program of specialization and quality improvement in the area of hospitality offer (hospitality offer matching the high quality and healthy life concept);
- Design and promotion of complementary products;
- Organization of spatial management (controlling illegal construction and spatial protection);
- Programs for sustainable use of cultural and natural resources for the health tourism product.

3.1.2 Legislative Framework in Serbia

- This Law regulates: the conditions and planning of tourism development; Tourism Organizations for tourism promotion; travel agencies; hospitality activities; nautical activities; hunting tourism activities; tourism services; fees and penalties in tourism; Tourism Register; other issues of significance for development and promotion of tourism.
- It does not contain special provisions regulating health tourism

Law on Spas (Official Gazette of Republic of Serbia no. 80/92 and 67/93 – State Law)
- This Law regulates functioning and development of spa centres, using natural-curative factor;
- In accordance with Article 1, spa is the region where there is one or more natural curative factors that are used and which meets the requirements in terms of organization and equipment needed for their use in accordance with the provisions of this Law;
- It is considered that all the requirements in terms of organization and equipment of the area are met as stated under paragraph 1 of Article 1 of this Law if the spa has:
  1) Organized health services;
  2) Facilities and equipment for the use of the natural curative factor;
  3) Accommodation facilities for visitors;
  4) Adequate utility infrastructure and other facilities (water supply, sewer system, road network, telecommunications, electric utilities, green open spaces and other recreational facilities).
- Health care institutions and other legal entities and natural persons engaged in health care activities by using the natural curative factor in the spa for the purpose of prevention, treatment and rehabilitation use the natural curative factor under the conditions stipulated by the regulations on performing health care activities;
- Permission to use the natural curative factor in the spa (thermal and mineral waters, gas and medicinal mud) is given to the legal entity or natural person by the municipality where the spa is located with the consent of the Republic of Serbia Government.

Law on Water (Official Gazette of Republic of Serbia no. 30/2010)
• The right to use the natural curative factor in the spa is given to a foreign person in accordance with the Law regulating the concession;
• This Law regulates the legal status of water, integrated water management, management of water facilities and watershed land, resources and the way of funding the water sector, supervision of this Law implementation;
• The right to the special use of water, thermal and mineral waters as well, is acquired by obtaining the water right permit in accordance with the Law, and if the special use of water is complying with concessions, and in accordance with the agreement regulating the concession.

Law on Public Private Partnership and Concessions (Official Gazette of Republic of Serbia no. 88/2011)
• This Law regulates: conditions and manner of drafting, proposing and approving the public-private partnership projects; the entities in charge of and authorised for the proposal and implementation of the public-private partnership projects; rights and obligations of the public and private partners; the form and content of the public-private partnership contracts with or without the elements of concession and legal protection in public contract award procedures; conditions and manner of the concession approval, the subject of concession, the entities in charge of and authorised for the concession approval procedure, the termination of concession; protection of rights of parties participating in the public contracts award procedures; establishment, status and competence of the Public-Private Partnership Commission, and other issues of significance for public-private partnership, with or without the elements of concession, or for concession.

Regulation on the conditions that must be met by the health institution for providing hospitality services to a third party (Official Gazette of Republic of Serbia no. 18/2012 and 54/2013)
• This Regulation prescribes technical, economic, market and other conditions to be met by the health institution that provides accommodation and food services to third parties;
• The health institution organizing the stay and providing the prevention, treatment and rehabilitation services can provide accommodation services and prepare and serve food and beverages to third parties with the approval of the Minister of Tourism;
• The health institution is obliged to fulfill the conditions prescribed by the Law governing tourism in order to provide hospitality services in the hospitality facility;
• The hospitality facility that operates within the health institution is classified to a particular category of a hospitality facility for accommodation.

3.2 REGULATORY FRAMEWORK IN BOSNIA AND HERZEGOVINA

3.2.1 Strategic Framework in Bosnia and Herzegovina

Strategy for Development of Tourism in the Federation of Bosnia and Herzegovina for the period 2008 - 2018 in the context of analyzing the natural resources basis for the tourism development emphasizes the fact that the Federation of Bosnia and Herzegovina has a great number of thermal and mineral springs with the potential of touristification. The Ilidža spa is mentioned as the warmest thermal spring and thermal springs in Fojnica, Olovo, Tuzla, Gradačac are also mentioned.

As for the choice of the development model, the Strategy uses the combination of development scenarios with restructuring and repositioning on the one hand, and the accelerated growth on the other hand which is clearly reflected on the chosen portfolio/matrix of the tourism products. In that
context, Health Tourism/Wellness/SPA is emphasized as a product with high attractiveness and competitiveness, and consequently with a high development potential bearing in mind the quality requirements for development of various types of of selective tourism. The following places are mentioned as adequate for development of this type of tourism: Ilidža, Fojnica, Kiselja, Teslić, Tuzla, Gradačac, Višegrad, Srebrenica, Dvorovi, Mlječanica, Laktaši, Slatina, Gata, Sanska Ilidža, Olovo, etc.

In further deliberation, the Strategy provides guidelines for development of the canton tourism. Health tourism/spas are specifically mentioned in the following proposed product portfolios in the cantons:

- The Tuzla canton – high attractiveness and competitiveness of the products are assessed here. Tuzla region is famous for its spas with natural mineral and thermal waters which cure inflammation, rheumatic, neurovascular, neurological and gynecological diseases as well as post-traumatic stress disorders with the possibility of rehabilitation. They are: Slana Banja in Tuzla, Ilidža Banja in Gradačac, Dvorovi Banja in Bijeljina and Guber Banja in Srebrenica. Health medical tourism is emphasized as a multiple destination product;
- The Zenica-Doboj Canton – the need is recognized for big investments in the context of the use of resources/base for development of the health tourism in the area of Olovo municipality, even though there is already a health and recreation centre using the thermal springs. At the same time the Health – Spa (SPA) centre Olovo is recognized as one of three key projects for this canton/i.e. one of the key investment projects recognized by the Strategy in whole;
- The Central Bosnian canton – high attractiveness and competitiveness of the Health – Medical Tourism product is assessed here. Fojnica – spa – health (SPA) centre is recognized as one of the key projects in the canton/i.e. one of the key investment projects recognized by the Strategy in whole.

3.2.2 Legislative Framework of Bosnia and Herzegovina

Law on Tourism (Official Gazette of FBiH no. 32/2009)

- This Law regulates performance of the tourism industry, types of services, conditions and manner of conducting the business, entities engaged in this activity and requirements for performing tourism activities;
- The Minister will prescribe the minimum requirements that must be met in order to be engaged in health tourism activities.

Law on Water exists at the federal level but there are also Laws at the canton level – Law on Water of the Sarajevo Canton (Official Gazette of Sarajevo Canton no.: 18/10) and Law on Water of the Zenica – Doboj Canton(Official Gazette of the Zenica - Doboj Canton no.17/2007). Key elements of these provisions are summed in the following text:

- This Law regulates the manner of water resources management within the territory of Bosnia and Herzegovina;
- Water resources management is under the jurisdiction of Bosnia and Herzegovina, Federation, canton, city and municipality in the manner determined by this Law;
- For any use of water that exceeds the scope of general use, water needed for tourism industry being included, a water approval or water right permit issued on the basis of water research work in accordance with the Law is needed;
- The Water Area Agency is in charge of issuing water permits for:
1. Water abstraction in quantities larger than 10 liters per second (the Canton is in charge of quantities up to 10 litres per second)

2. Performing tourism activities and

3. Other in accordance with Article 139 of the Law

- Authorities in charge of granting concessions for the use of water and public water resources is obliged to, before starting the procedure for granting concession, obtain the prior water approval from the competent authority in accordance with the provisions of this Law;

Law on Concessions BiH (Official Gazette of BiH, no. 32/2002) and Law on Changes of Concessions BiH (Official Gazette of BiH – no. 56/04)

- This Law regulates the modalities and conditions concerning the granting of Concessions in Bosnia and Herzegovina, the competence for granting of Concessions, institutional structure, competence and other issues pertaining to the work of Bosnia and Herzegovina Concession Commission;
- The Council of Ministers of Bosnia and Herzegovina makes a decision about the type and subject of the Concession as well as about the scope of the Concession granted and confirmed by the Parliamentary Assembly of Bosnia and Herzegovina;
- Concession is granted through the tender procedure in accordance with the Law.

Based on the Law on Concessions BiH, Laws on Concessions at the level of cantons passed: Law on Concessions of the Sarajevo Canton (Official Gazette of the Sarajevo Canton, no.: 15/13), Law on Concession of the Zenica – Doboj Canton (Official Gazette of the Zenica - Doboj Canton, no.: 5/2003) and Law on Concessions of the Central Bosnia Canton:

- Law on Concessions at the level of cantons defines concept and subject of Concession, granting procedure and other issues associated with granting the Concessions at the level of cantons, medicinal and thermal and mineral waters being among others;
- Decision on granting the Concession for a certain water resource is taken by the Canton Assembly on the recommendation of the Canton Government;
- Concession is granted through the tender procedure in accordance with the Law.

3.3 CONCLUSIONS ON THE EXISTING REGULATIONS

As we have already seen, regulatory framework for the health tourism development in the Republic of Serbia and the Federation of Bosnia and Herzegovina is defined by the legal regulation in the countries, the acquired sector strategies as well as enforced reforms. The framework should be considered through two components:

1. Privatisation and/or reorganisation of the state special hospitals / rehabilitation centres (or similar state-owned institutions) as current services holders and the backbone of the health tourism in Serbia and Bosnia and Herzegovina;

2. The existence of legal norms intended for the use of thermal springs and the natural curative factor that are not in use in order to improve the economic development.
Lack of the appropriate strategic approach to the use of a certainly great potential of touristification of the health tourism sector/spas and climate treatment centres is maybe best illustrated with an example of the recent events regarding the privatisation of these institutions in the Republic of Serbia.

The Government of the Republic of Serbia agreed in 2008 to start the privatisation procedures for 13 special hospitals, two of them being located in the target area (Zlatar and Zlatibor). However, establishing an adequate privatisation model is complicated since there is the series of unresolved ownership, legal and status issues, most of all with the Pension and Disability Insurance Fund of the Republic of Serbia (PIO Fund) which has been investing its funding means in the hospitals for decades. By the end of 2005, the PIO Fund Management Board decided to register, classify and protect the Fund’s property which includes 29 rehabilitation centres in the Serbian spas. As the PIO Fund claimed, 400 million Euro had been invested just in building the rehabilitation centres. In the last few years, the Fund has initiated passing the Law on the PIO Fund assets and more than 20 judicial proceedings have been started to determine ownership rights over the rehabilitation centres, i.e. special hospitals in the Serbian spas. The Municipal Courts in Lebane, Vrnjačka Banja, Raška and Kraljevo introduced temporary measures to prevent the sale, disposition and alienation of these centres until the judicial proceedings started by the PIO Fund are completed. The additional 16 rehabilitation centres undergo judicial proceedings since there is evidence they were built using the PIO Fund funding means, too. At the time of writing this study, the Rehabilitation Centre Zlatar has been returned to the PIO Fund. The decision is legally binding and it is yet to be seen how the problem with the Centre is going to be resolved.

One of the biggest issues that additionally slowed down both the spa capacities privatisation process and starting the use of the new thermal and mineral springs/climate treating potential is insufficiently clear legal framework which regulates the use of the natural curative factor (spa thermal waters and medicinal mud). Granting permission for the use and the way of using the natural curative factor is regulated by a set of the sector laws. Provisions regulating managing spas, the curative factor exploitation and paying fees in the spas (for mineral waters and medicinal mud) are very heterogenous and mutually uncoordinated and several Ministries and State Agencies are in charge of their carrying out. The sector is regulated by the following: Law on Spas, Law on Water, Law on Mining, Law on Health Protection, Law on Tourism, Law on Local Self-Government, Law on Local Government Finance, Law on Environmental Protection, Law on Public Private Partnership and Concessions, Regulation on the conditions that must be met by a health institution for the provision of catering services to third parties, Regulation on the fees for the use of water resources and for the material removed from the water course, and other normative acts of lower rank.

Even though the reform of the overall legal framework is being undertaken and the legislation is being adjusted to the EU legislation, the part concerning health tourism has not yet been reformed.

The new Law on Tourism in Serbia has not brought any significant changes in the segment for the part concerning health tourism and its development is not treated separately as parts on hunting and nautical tourism are. On the other hand, the Law on Spas from 1992 is still in force and it is limiting in many ways. First of all, the way of granting permissions for the use of the natural curative factor, i.e. thermal and mineral waters provided by the Law is contrary to the current Law on Water and Law on Public Private Partnership and Concessions of the Republic of Serbia. Even though the jurisdiction of
the municipality to take care of and provide optimum conditions for preservation, use and improvement of the areas with the natural curative properties is in accordance with the Law on Local Self-Government, Article 20, Paragraph 22, and the Law on Local Government Finance, Article 36 determines that shared revenue of the Local Self-Government units imply fees for the use of mineral resources, water, natural curative factor and other fees compliant with the Law, it is the Law on Spas which defines that the amount of the fee for the use of the natural curative factor is to be determined by the National Assembly which, from the moment the Law was passed more than 20 years ago has never determined the amount of the fee. And there is no other possibility for the amount of the fee to be determined.

As for the Federation of Bosnia and Herzegovina, the legal framework has been improved during the last couple of years, according to the project "Technical Assistance to Support Tourism Industry in Bosnia and Herzegovina" (EuropeAid/ 128357/ C/ SER/ BA) conclusions; however it has been recommended for the whole system to be made more coherent especially in the segment referring to relationships between the central institutions and cantons / municipalities and attention should be paid to the consumer protection. So it is necessary to reduce the number of public institutions responsible for tourism development and to establish mechanism to build tight cooperation between the Ministry responsible for tourism and municipalities. As for marketing and promotion, the division of work between the Ministry at the Federation level and foreign representatives must be clear and transparent since the clear perception of Bosnia and Herzegovina as a destination and its future tourism products must be created.

It is clear that the tourism regulation does not encompass all the relevant issues nor does it represent separate documents but is part of the wider legal framework. So it is important to develop clear "rules of the game" and to provide procedures to fully implement provisions of the regulatory framework especially when it comes to related issues of statistics, consumer protection, environment protection, traffic, public private partnership and concessions, cultural heritage, workforce, etc. The responsibility of the authorised institutions is to be facilitators of enforcement of the regulation in favour of the tourism development and, in this particular case, to provide elaboration of the procedures for the use of the natural potential for the purpose of health tourism development. In that context, the internal legal framework must predict the principle of the cross-border cooperation in order to create a possibility of common planning and cooperation in the domain of providing the tourism services based on common resource basis in the given area – between the neighbouring geographical regions belonging to different countries or at the thematic level connecting the regions through certain common elements.

Consumer protection is of exceptional significance for creating a healthy ambience that will provide safety and security of guests who will arrive. Therefore, the existing regulation needs to include adequate standards guaranteeing the level and quality of the experience to the future tourists but also to provide fair and competitive conditions for the business development.

Bearing in mind inconsistency of the legal framework and the complicated procedures, especially when it comes to the spa potential development, it is a must to understand examples of good practice in the countries with a higher level of the spa potential development and to apply certain short-term and medium-term solutions. The summary of the spa potential development framework in Slovenia and Bulgaria will be presented in the following text.
Representing interests of the service providers in the health tourism domain

Service providers in the health tourism domain in Serbia have long ago recognised the need to articulate their interests through certain associations which include all the stakeholders interested in development of this field. Bearing in mind a long standing unfavourable perception of the tourism sector and its development potential, it is easy to understand the fact that the spa tourism has long been marginalised by the development policy creators. In the last 6-7 years there has been a growing interest in active tourism development policy in Serbia, so the activities of the Spas and Resorts Association has become significant.

The Spas and Resorts Association is the most representative body of Serbian spas development. The organisation was formed in 1970. It has 77 members from 39 spa centres and resorts. The Association members are municipalities, institutes, special hospitals, hospitality and tourism enterprises, scientific institutions and other members whose activities are connected with spa tourism. The Association is financed by paying the membership fees, sponsorships and after the projects are completed. It is a member of the European Spa Association, ESPA, and one of the Balkan Spa Summit organisers.

BALKAN SPA SUMMIT is organised by spa associations of the following countries: Turkey, Bulgaria, Serbia and Greece (Turkish Association of Spa Thalasso and Health Resorts /TURKSPA/, National Association of Spa & Wellness Tourism /NAST/, Serbian Spa Association and Spa Managers Club of Greece /SMCG).

The Balkan Spa Summit is organised each year by a different Balkan country offering people the opportunity to present innovative ideas, exchange experiences, and build a network to engage stakeholders and business policy creators. Additionally, the idea of forming the Balkan Spa Association and Education Centre aimed at competitive development of the segment in the initiating countries and in other countries of the region is in its initial phase of realisation.

3.4 COMPARATIVE REVIEW OF PRACTICES IN RELATION TO SPA FACILITIES DEVELOPMENT (SLOVENIA AND BULGARIA)

Slovenia and Bulgaria are the countries from our immediate vicinity with long-term experience of active development of health tourism as a specific tourism product. The initiative in these countries was taken by the private sector and procedures for the spa facilities development have been simplified – the example encompasses the use of thermal and mineral springs. In the domain of service delivery to the final consumers, the adequate quality standards of the Spa centres in Europe are applied (see the next Chapter).

Slovenia

- Identification of the location suitable for the spa facilities development – resolved ownership issues and legal relations;
- Testing potentials of the thermal and mineral spring (abundance and consumption) and writing the feasibility study;
• Asking for the concession in accordance with the rules of the Law on Water and the adequate Regulation on concession for the use of underground water for pools and treatment centres1;  
• Realisation of the regulatory procedure for obtaining a building permit, as it is the case with all other types of hotel facilities.

Bulgaria

• Relevant regulation concerning the spa potential development in Bulgaria includes the Law on Water which defines jurisdiction over certain types of water. Mineral water is certainly state-owned but it depends on the type of spring whether it will be under the jurisdiction of the central Government or a municipality (as defined by the adequate official list provided by the Law);  
• Law on Concessions defines the procedure for obtaining a concession for different types of water. Municipalities are bound to assign thermal and mineral springs to development of the spa (health) tourism or to other commercial activities in accordance with the feasibility study;  
• Law on Tourism defines health / spa tourism as a special type of tourism without any separate provisions regulating the specific spa areas;  
• National, regional and municipal strategies for the tourism development define in great detail the potential and the ways of realisation / types of projects for the use of the spa potential.

3.5 EXAMPLES OF GOOD PRACTICE IN EU

3.5.1 Standardization of spa centers quality in Europe

U Evropi su udruženja spa centara iz različitih zemalja, razvila sledeće sisteme akreditacije za spa centre:  

• The German Spa Association has developed the seal of quality “Die Kur” which is given to the spa centers with the highest quality standards in their services delivery. The focus is on the unique remedies and remedial treatments and other significant spa centers features. The quality seal “Die Kur” is given for the level of quality and a method of conducting therapeutic sessions in each spa resort. Also, the quality seal is given for: quality of preventive health programs (“Prävention im Kurort”), quality for wellness services delivery (“Wellness im Kurort”), and for the quality of natural surroundings (“Park im Kurort”);  
• The Great Britain Spa Association has developed the international system of accreditation for spa centers “British International Spa Accreditation” determining the quality standards in the spa industry in order to establish confidence of the spa centre users. The accreditation system encompasses the set of criteria evaluated in the process of accreditation of the specific spa centre. The quality seal (so-called “Waves of Excellence”) is based on questionnaires directed at consumers using the spa centers including the questions regarding the services quality, atmosphere, satisfaction with therapies and treatments, value for money, human resources professionalism, the range of services available, etc.

1 http://www.arhiv.mop.gov.si/si/zakonodaja_in_dokumenti/veljavni_predpisi/zakon_o_vodah/index.html#c17365 - pod Kopališča in naravna zdravilišča
European Spa Association has developed international quality certificates **EUROPESPA med** for health resorts (healthcare institutions) offering medical treatment and prevention programs and **EUROPESPA wellness** for wellness hotels, hotel spas, thermal spas, and day spas.

### 3.5.2 European Spas Association and the EUROSPA Seal of Quality

The most significant institution representing the interests of spa centers in the area of Europe is ESPA - European Spas Association with the official seat in Brussels. The European Spas Association is an umbrella organization representing 20 members (mainly National Spa Associations) from 19 European countries. According to the European Spas Association, in Europe there are more than 1,200 spa and health resorts, which are medically respected health centers, and generate significant proportions of the gross domestic product of the EU member countries.

The European Spas Association has established the following aims:

- Monitoring and analysis of the condition of the spas and health resorts in the European Union member countries;
- Stimulation of exchange of experience, best practice and know-how;
- Production and development of programs for health and spa and wellness products and strategies for prevention and rehabilitation for all living within Europe;
- Establishment, promotion and improvement of the standards in all spas and health resorts within Europe;
- Stimulate and resource spa research;
- Define and harmonize training programs and courses and to determine a professional structure for the European spa industry;
- Establish a framework for collaborative marketing activities for ESPA member countries.

According to the assessment of the European Spas Association, there are 18,000 European facilities / institutions in the health and spa and wellness industry generating a turnover of 30 billion EUR.

The European Spas Association, in order to standardize the service quality in Europe, has developed international quality certificates **EUROPESPA med** for health resorts (healthcare institutions) offering medical treatment and prevention programs and **EUROPESPA wellness** for wellness hotels, hotel spas, thermal spas, and day spas. Thus, the standardization has been enabled especially in the domain of health tourism in Europe since each member country has its own standards of treatment and legal framework regulating conditions the health institution has to meet.

The set of criteria in the evaluation process for obtaining the **EUROPESPA med** certificate addresses the following areas:

1. **Management system and conformity:**
   - General requirements for spa resorts
   - General conformity with local regulations regarding environmental protection and natural local remedies
   - Suitable structure and organization
   - Quality and safety management
   - Quality and safety management (spa-specific aspects)
   - Analytical quality control
2. **Procurement of local remedies**
3. Therapies, treatments, pools, wellness

- Medical sector
- Management and maintenance of the treatment and rest areas
- Swimming pools and saunas

4. Accommodation

- Accommodation for guests and patients

5. Cuisine

- Catering operations

6. Activities

- Activities and recreation

7. General surroundings
CHAPTER 4

Tourism Portfolio of the Health Tourism Products

STUDY ON JOINT POTENTIAL OF HEALTH AND WELLNESS TOURISM DEVELOPMENT IN THE CROSS-BORDER AREA (SARAJEVO MACRO REGION AND TOURISM REGION OF WESTERN SERBIA)
4 TOURISM PORTFOLIO OF THE HEALTH TOURISM PRODUCTS

4.1 PRIORITY TOURISM PRODUCTS

4.1.1 Rehabilitation-therapeutic tourism

Rehabilitation and therapeutic tourism

The primary component of this product is the process of the non-invasive treatments and rehabilitation and provision of health and wellness treatments under the supervision of professional medical personnel. In Europe, this type of tourism primarily involves the use of medicinal thermal and mineral waters, while in the U.S. market hydrotherapy may not be included.

Medical spa centers are related to spa centers which primary role is providing the complete health care services that employ professional and specialized medical personnel. The offer must include comprehensive medical and wellness services in one area - classic spa services, conventional and complementary treatments and therapies primarily for clients with health problems.

Products segmentation

<table>
<thead>
<tr>
<th>Healing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rehabilitation</td>
</tr>
</tbody>
</table>

Tourism infrastructure

Rehabilitation centers, specialized hospitals, health resorts, thermal spas

Focus in product development

Considering the market trends in this segment, the development focus of this product should be restructuration of the product and reposition in the market. The requirement for that is the existence of the market environment for product development and solutions that are tailored to modern guest requirements. Most spas in western Serbia and Sarajevo Macro Region have not gone through the privatization process yet and many of them (Fojnica, Olovo) have not regulated ownership status.
On the basis of the existing thermal mineral springs with the healing properties and the significant number of the existing spas within the territory of Sarajevo Macro Region and Western Serbia, medical spa centers represent one of the biggest potentials in the health tourism of this region. One of the key advantages in development of this product is the existing medical staff in the centers, the level of their expertise, and the existing medical equipment. However, given the market trends within this segment, we believe that the present product in this tourism segment needs to be conceptually restructured and repositioned in the market. It is conditioned by the market environment for the product development and the solutions adjusted to the modern guest requirements. We need to mention the exception of the (treatment centre) Ilidža spa in Sarajevo Macro Region which is privatized and Arab market oriented, so it adjusts its offer to this segment.
4.1.2 Wellness Tourism

Wellness involves long-term behavior change which brings balanced state and well-being to the body, mind and soul. "Wellness Culture" is described as a megatrend of 21st century. Estimated market potential of the wellness industry in the USA is $200 billion, and wellness industry in Europe earned almost €100 billion in 2008.

Wellness tourism refers to healthy guests who come for treatments which will provide them with good physical, mental and spiritual health status.

Wellness centers also include medical (wellness) centers related to spa centers which primarily provide wellness services under the supervision of medical personnel.

### Products segmentation
- Wide range of programmes/activities for mind, spirit and body regeneration
- Relaxation/recreation
- Occupational wellness

### Tourism infrastructure
- Spa centers, spa i wellness hotels, resort hotels, destination spas, day spa centers

### Focus in product development

In this tourism segment, there are some major misunderstandings of the wellness concept and services that should be included in wellness tourism product. Wellness vacations include wide range of different programmes/activities: active vacation, ayurveda, detoxification, weight loss programmes, anti-stress programmes, holistic programmes, pampering, yoga, meditation, courses on development/improvement of different skills, education, hydrotherapy programmes, face and body beauty treatments, sport and fitness, nutrition programmes, etc.
4.1.3 Medical Tourism

Medical tourism involves travel outside of the country with the aim of performing the medical procedures which includes certain surgical procedures, both treatments of diseases and cosmetic procedures. The term “Medical tourist” means a patient who travel abroad in order to get some form of healthcare treatment and/or medical procedure.

According to the report of the „Tourism Research and Marketing Group”, in 2006, global medical tourism industry was estimated at 37 million trips for medical purposes, which generate revenue of 33 billion.

**Products segmentation**

<table>
<thead>
<tr>
<th>Surgical procedures (operations)</th>
<th>Tourism infrastructure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plastic surgery</td>
<td>Hospitals, clinics, polyclinics, specialized hospitals</td>
</tr>
<tr>
<td>Dentistry</td>
<td></td>
</tr>
</tbody>
</table>

**Focus in product development**

There is no necessary infrastructure in territories of western Serbia and Sarajevo Macro Region, but considering the global market trends, we believe that this segment of tourism should be included as one of the preferred group of products, especially in the long term. Market trends also refers to growth of the taxation of insurance companies in medical tourism. Factors that restrict the expansive growth are the need for constant healthcare and legal issues in determining the responsibilities for unprofessional treatment (**nursing**).

Within the European Union, travel to other EU member countries for health reasons is in the process of regulation since the “Directive on the Application of Patients’ Rights in Cross-Border Healthcare” in 2011 was adopted by the European Parliament. The goal of the Directive is to regulate the sector and
to provide information on patients’ rights to treatments and health care in other EU member countries.

The trends indicate that the health tourism market “medical tourism” is growing and is significantly influencing the health care and health insurance systems in Europe. Unfortunately, the statistics on movement of patients in the EU countries for health reasons is practically non-existent, but there are records showing that the interest in traveling to other EU countries for medical reasons is increasing. In order to support the health tourism development, many Governments give their support to this type of tourism by carrying out strategic political initiatives. The measures that the Polish Government has taken to position itself as the destination country for dental procedures and plastic surgery but for other health treatments as well are a good example (see: http://www.medical-tourism-poland.com). Support to the health tourism development in Poland is also given by the “Polish Medical Tourism Chamber of Commerce” and the “Polish Association of Medical Tourism” (see: http://www.pamt.org/). According to the Polish Chamber of Commerce, 120,000 visitors spent 162 million dollars on medical treatments which means over 1,000 EUR spending per patient. The main reasons for traveling to Poland are low-cost treatments and shorter waiting times for the surgery/procedure.

One of the main motives for traveling abroad for health care is the cost of treatment/intervention. The reasons to travel abroad for health care are also: long waiting lists for certain medical services and the ageing population trend.

The increasing trend of medical tourists from the financially strong markets such as the Arab countries and Russia where the cost of medical services is not the crucial factor in choice of the destination has been noticed recently.

Key success factors of this tourism segment are: cost of medical services, medical services standard, staff competence, hospital equipment, destination attractiveness.

4.2 KEY BARRIERS FOR HEALTH TOURISM PRODUCT DEVELOPMENT

- The level of competitiveness of the medical tourism product in the territories of Western Serbia and Sarajevo Macro Region

In regard with the defined key success factors of the medical tourism product, the present level of competitiveness of the health tourism product within the subject territory does not satisfy the international quality standards. Therefore, we believe that at present, with no significant investments, medical tourism products are still not ready for the international commercialization and it is not possible to attract a significant number of foreign tourists.

- Situation of the “belated privatization” of the inherited spa product

After the fall of communism and changes in the European health tourism market, the Processes of privatization, restructuring and repositioning of the classic spa product took place in many European post-communist countries (Czech Republic, Slovakia, Hungary, Slovenia, Poland). Therefore, the spa
product differentiation was carried out in many European countries and a new health tourism portfolio terminology was introduced. However, bearing in mind the political and economic situation in the Balkans region, the majority of spas in Serbia and the Federation of Bosnia and Herzegovina have not yet gone through the process of privatization and conceptual restructuring of the product in regard to modern market trends. Consequently, the majority of spas in Serbia and the Federation of Bosnia and Herzegovina are mainly the treatment and rehabilitation centers for domestic visitors. Also, in a certain number of spas, it has not yet been defined which public sector entity is entitled to rights.

- The lack of investments for the facilities renovation and for the new medical tourism projects in the territories of Western Serbia and Sarajevo Macro Region

At present the spa product in the subject cross-border region is a domestic market oriented product, focused on the medical service quality, and the component of the accommodation, hospitality, and entertainment offer is neglected. Therefore, for further product development in accordance with the modern market trends big investments in product restructuring and its positioning in the international market are needed.

- The lack of the strategy/program for the medical tourism development at the national levels

Even though health tourism has been recognised as one of the most important tourism segments in the tourism development national strategies, neither Republic of Serbia nor the Federation of Bosnia and Herzegovina has adopted a strategy/program for the health tourism development at the national level in order to clearly define the further development model of the inherited spa concept and health tourism priority products.

- The Image of Serbia and Bosnia and Herzegovina with regard to medical tourism

Many countries in the health tourism global market have decided to promote health tourism in their countries/regions so they are trying to position themselves as the medical/wellness tourism destinations. For instance, Austria uses a slogan “Europe No.1 Spa Destination”, Hungary – “Hungary Keeps the World Healthy”, Switzerland – “Health Destination”, Bulgaria – “Waters of Wellness Refreshing. Bulgarian Spas”, Germany – “Welcome to the World of Well-Being”, Poland “Natural Choice for Health and Beauty”, etc. Neither Serbia nor Bosnia and Herzegovina has the national health tourism marketing plan or branding plan to make the country a health and wellness destination. We can say that the present image of Serbia and Bosnia and Herzegovina is not associated with the health tourism except for the individual cases in terms of the price competitiveness. Therefore, it is necessary to define the joint platform for communication and health tourism product promotion at the national level as well as the product positioning strategies.

- The lack of the coordination body/institution for the medical tourism product development

Regarding the existing inherited spa product there is a great number of interest entities – different Ministries (of Tourism, Health, Mines, Environment Protection) local authorities, pension funds, social security funds, veteran population funds, spa associations, etc. Individual interest entities are dealing with the issues of further health tourism development in Serbia and Bosnia and Herzegovina, but there is no single institution/body that should coordinate the process of making decisions on further development goals and activity plans in the health tourism domain, especially when it comes to the strategy for further spa development.
• **Unelaborated destination management system**

The destination management system is not elaborated at the level of destinations located in the subject cross-border territory. Destination management implies managing the whole tourism value chain, coordination of functions and activities concerning spatial management, managing thermal and mineral springs and other natural curative factors, managing urban aesthetics, etc.
CHAPTER 5
Recommendations for Further Development
STUDY ON JOINT POTENTIAL OF HEALTH AND WELLNESS TOURISM DEVELOPMENT IN THE CROSS-BORDER AREA (SARAJEVO MACRO REGION AND TOURISM REGION OF WESTERN SERBIA)
5 RECOMMENDATIONS FOR FURTHER DEVELOPMENT

5.1 FOREWORD

In targeted cross border area, health tourism development is traditionally based on healing waters of warm mineral springs primary used for healing and medical rehabilitation. There is a great number of natural local healing factors in targeted area and potential for health tourism development is unquestionable. But comparing with international market, new vision for spa product should be developed and based on market demand. Therefore, the success of targeted cross border region in health tourism in the international market, depends on its capacity to respond to the demands of modern guests and offers internationally competitive products.

Limiting factors for creation of joint offer are:

- For the markets outside of South-East Europe, road infrastructure and distance are limited factors for development of joint product. For markets within Southeast Europe, there is some potential generated by self organized tourists.
- At the current level of competitiveness achieved in the development of products to the field of medical tourism, the regions can hardly compete with already developed and molded tourist destinations in the region (Hungary, Austria, Slovenia, Slovakia, Romania, etc..)
- Therefore, the international commercialization of products in the field of medical tourism, requires significant investment and product development with the proper market concept and the repositioning of the market and the new image of medical tourism;
- To develop new products, it is necessary that each of the existing facilities / institutions can analyze the market, set the new concept, market segments, market positioning, investment and finance;

Considering the currently achieved level of service compared to international standards, cross border region should join forces and focus on:

Building competitiveness

- that mentioned area prepares for market entry by international rules of the game of which are key factors:
- Development of market-driven products
- Establishment of Marketing System
- Development of high standard of service in health tourism (sufficient, adequate structure and training of staff).

Work on each of these competitiveness factors implies an active attitude of the state to eliminate all identified systemic barriers by building a framework for development planning and investment.
5.2 POTENTIALS FOR DEVELOPMENT OF THE JOINT HEALTH TOURISM OFFER IN THE CROSS-BORDER AREA

For the purpose of better understanding and transparency of the recommended measures as well as establishing development concept, the following text includes standard definitions of tourism destination and tourism product as well as basic phases in the tourism product development. It may serve as a framework for directing further activities in the subject area.

Tourism product is related to the tourism destination as a framework of competitiveness, development and tourism marketing (most of all promotion and sales). When we talk about tourism destinations, we usually imply the following feature categories:

- Physical and psychological elements of a destination (all the things that make the destination compact and uniquely recognisable in the market);
- Unique image and the destination promotion.

Generally and for the purpose of the study, it is important to classify tourism destination into five different categories depending on the type of tourism products (travels) that are offered:

- The centred destinations (the most common type) – represent a traditional form of tourism destinations. They are most frequently holiday destinations where tourists spend the majority of their time with perhaps occasional excursions to visit nearby attractions (e.g. the classic seaside holiday, winter sports resort, or short city break represent the most common type in this grouping);
- Destinations that form a base from where the surrounding region can be explored. Some seaside resorts have successfully reformulated their marketing strategy to sell themselves as bases for exploring the nearby countryside. The best example from our region is Istra that offers tourists both the seaside resorts and other attractions located on the peninsula (wine cellars, agritourism, etc.) – Tourism Region of Western Serbia has developed into this type of destination with several “bases”, Zlatibor being the most important one;
- Multicentre holidays, where two or more destinations are of equal importance in the itinerary (e.g. capital cities of the former Yugoslavia);
- Touring destinations, as part of a linear itinerary, including stops at number of points (e.g. Roman Emperors Route, wine route, various cultural routes, etc.);
- Transit destinations, which merely provide an overnight stop en route to the final destination.

Bearing in mind reference strategic and legal frameworks for the Republic of Serbia and the Federation of Bosnia and Herzegovina, in the context of health tourism (and tourism in general), we can discuss only tourism product development. Tourism product development represent a process whereby the assets of a particular destination are moulded to meet the needs of national and international customers.

Tourism product can include natural or man made attractions, hotels, resorts, restaurants, theatres, activities, festivals and events. The tourism product development should be focused on delivering a visitor experience – combination of different elements for tourists to see or experience/do (e.g.

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3 Source: Handbook on Tourism Product Development, UNWTO and ETC, 2011, p. 4
active pursuits – sports, water-based activities, hiking/cycling, etc.; pastimes related to natural and cultural heritage of great significance, organised entertainments; health and wellness; recurring festivals and events).

In the previous text where health tourism was defined as a tourism product, certain forms of health tourism and relevant markets were introduced. In that context, the use of potentials of the health tourism development in the cross-border area of Tourism Region Western Serbia and Sarajevo Macro Region can be discussed through the prism of product cluster development, since their resources and activities are linked through a common theme of interest taking into consideration the heritage and relevant regulatory framework.

Product clusters are positioned in the market and promoted as tourism circuits with a common central theme (health and wellness). The public sector initiative is essential:

- to group key stakeholders, and all the other service providers and manufacturers in order to achieve continuous cooperation, and, in some instances
- to support the development of the cluster through direct intervention – by providing infrastructure, facilities and amenities as crucial things for a certain product development.

Bearing all this in mind, the development process of health tourism as a tourism product must go through the following phases:

1. Establishing the institutional framework / adequate organisational structures (product clusters);
2. Defining systems, structures, procedures and mechanisms of control;
3. Detailed situation analysis;
4. Market: product matching process (market research to identify market characteristics, profile, taste of consumer categories / market segments, and trends; competitor analysis; product matching in relation to identified market needs; best practice analysis and benchmarking);
5. Tourism product development planning consultation with the key stakeholders within the product cluster;
6. Tourism product development plan consisting of: development strategy, development zones (by type and degree of development) and scale and form of development through product clusters which imply matching vision and activities with all the relevant stakeholders.

In the context of previously defined procedure of the tourism product development in the subject area and bearing in mind current situation in relation to the development degree and problems concerning health tourism and tourism in general, we recommend possible directions for improvement of the existing offer and for the further development of the health tourism segment.

For a successful commercialisation of a new offer/ new products, it is necessary to take into consideration both target markets – geographic markets that will be targeted and wanted market

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4 Adapted from: Handbook on Tourism Product Development, UNWTO and ETC, 2011, p. 52
5 Adapted from: Handbook on Tourism Product Development, UNWTO and ETC, 2011, p. 85
segment. Cooperation with intermediaries in marketing (sales) channels is crucial in order for the tourism offer to be defined – tour operators, tourism agencies and booking services. It is also important to directly explore wishes and attitudes of potential clients and to fine tune the offer package.

So, the key marketing strategies must cover the following areas of activity:

1. Focus on markets and segments with the highest potential (geographic markets and market segments with adequate solvent demand);
2. Recognisable market positioning and building a tourism brand/ image of the area as the “Balkan Oasis of Well-Being and Health”;
3. Providing delivery of an experience to clients as an added value of each stay at the destination (the goal is to provide a pleasant memory of the stay at the destination aiming for creating the “wow“ effect – perception of the delivered value must significantly exceed the price in the consumers' minds).

The said key marketing strategies and their development in the proposed integrated marketing system tactics represent a framework for the strategic and operational marketing plan for the health tourism promotion supported by the Cross Spa Project.

We would also like to mention the key characteristics of the market segments which should be taken into consideration in further elaboration of the health tourism offer as well as in the existing offer in the subject area:

**DINKS (Double Income, No Kids)**

- People aged 25-35. Many are in demanding jobs and are well educated.
- DINKs (Double Income, No Kids)
- SINKs (Single Income, No Kids – single people)
- Time is often the most important commodity to them – cash rich, time poor
- A holiday represents an important opportunity to recharge batteries and relax since their lives are usually stressful and busy – they seek excitement.
- For couples, their relationship is a maturing interest, whereas the solos are more self-indulgent in their pursuits.
- As they do not have families, they can put their own needs and desires first without having to compromise – they reward themselves for working hard throughout the year.

Prefered products

- City breaks
- Wellness and relax packages
- Sun&Beach with the entertainment offer segment
- Gastro tourism
- Nautical tourism
- Diving, sailing
- Active&Adventure products

Motives

- Rest and relaxation
Recommendations for further development

- Activities
- Sports
- New experiences
- Culture and sightseeing
- Culinary experiences
- Wellness
- Shopping

Success factors

- Online services availability (internet, portals, news, destination activities reviews)
- Various activities (sports, culture, art, relaxation)
- Authenticity
- Surprise factor and discovering new things
- Local people openness and good communication
- Value for money
- Availability of high quality transport infrastructure and networks

Empty Nesters

- People aged 45-65
- They still work, often have responsible jobs and high incomes – under high levels of stress
- Their children are adults (they have jobs or go to college, they are DINKs or SINKs)
- They are interested in rediscovering old interests and finding new ones
- They do not feel old and are not ready to give up on adventure
- They are likely to take holidays outside the main summer holiday period and are likely to book last minute holidays
- Some of them have a significant interest in a holistic approach to life and well-being – health, diet, activities, quality of life, wellness, treatments
- They enjoy trying new things and soft adventures. They have interest in maintaining health and fitness and are looking for a revitalising holiday experience.

Prefered products

- Wellness, relax and holistic packages
- City breaks
- Events and culture
- Gastro tourism
- Nautical tourism and cruising
- Active&Adventure products

Motives

- Culture and sightseeing
- Rest and relaxation
- Special interests
- Wellness
- Shopping
- Activities
- New experiences

Success factors
Recommendations for Further Development

- Service quality
- Feeling of comfort and luxury
- Value for money
- Online services availability (internet, portals, news, destination activities reviews)
- Availability of high quality transport infrastructure and networks
- Storytelling destination with high specificity and authenticity
- Abundance of activities (sports, culture, art, relaxation)
- Special interests
- Excursions

**Golden Oldies**

- People aged 65+ in reasonably good health and independent
- They do not have significant health issues but activities and contents must be more gentle and not so demanding
- Even though they are older, they are still looking for new experiences, activities and contents on holiday
- They have a limited budget but their income is high enough to provide them with travels and extra activities
- They have interest in visiting places they used to visit when they were younger as well as visiting iconic attractions
- The new generation of “Golden Oldies” is likely to be well travelled, educated and discerning
- They want activities, but personal comfort is a primary travel concern

Preferred products

- Sun&Beach
- Tours
- City breaks
- Cruising
- Events and culture
- Health tourism

**Motives**

- Culture and sightseeing
- Memories and tradition
- Wellness and health
- Moderate physical activities
- Shopping
- New experiences
- Rest and relaxation

**Success factors**

- Availability of the destination, its quality and moderate prices
- Online services availability (internet, portals, news, destination activities reviews) is becoming more and more important to them
- Abundance of various adequate activities (sports, culture, art, relaxation)
- Authenticity
- Gastro offer and wine
- Value for money
• Group excursions

**Business and MICE**

• People aged 25-65, different job positions
• Habits of business travellers are often related to their position in the company they work for, so there are three groupings (depending on the level of accommodation service and content they are looking for):

  Top management
  Middle management
  Lower management and employees

• MICE (Meetings, Incentive, Conventions, Exhibitions) travellers demand large available capacity, high level of service and value for money
• They rely on technology – before the travel and during their stay
• They value rich gastro offers as well as additional activities at the destination
• Transport availability and travel comfort are of the utmost importance
• This is a growing market that appreciates undiscovered destinations

**Prefered products**

• Congress meetings, fairs and similar events - MICE

**Motives**

• Business activities
• Congresses
• Conferences
• Business meetings
• Fairs
• Gatherings
• Getting to know new places
• Entertainment

**Success factors**

• Availability of the destination and its quality
• DMO and DMC agencies and organisations
• Destination image
• Hospitality contents – restaurants, bars, wine cellars with sufficient seating capacity
• Entertainment and shopping contents of the destination
• Air connectivity to the destination
• Congress centre and sufficient accommodation capacity
• High-tech equipment

**Athletes**

• People of different age – from the youngest to retired ones
• Depending on dedication to sports, they can be:
RECOMMENDATIONS FOR FURTHER DEVELOPMENT

Professional athletes
Coaches and referees
Recreational athletes
Beginner athletes

- Expectations from the offered product depend on the level of dedication to sports
- Athletes travel throughout the year: preseason trainings (emphasis should be placed there), the main season of sports camps and additional activities
- Special requirements: adjusted diets, special services (washing sports equipment, coordinators), adjusted and functional sports fields – quality and quantity
- DMC/DMO as one of the key development factors and the way of commercialisation of this product

Preferred products

- Sports trainings
- Sports competitions, tournaments, championships
- Summer sports camps
- Regattas

Motives

- Sports trainings
- Climate conditions
- Sports fields
- Competitions
- Getting to know new places
- Entertainment

Success factors

- Availability of the destination and its quality
- Destination image
- Variety of accommodation capacity
- Hospitality contents with sufficient seating capacity
- Entertainment and shopping contents of the destination
- Air connectivity to the destination
- Sports centres/fields
- Competitive teams at the same destination and at the same time – sparring partners

Families with younger kids

- People aged 30-45
- They often have responsible jobs, different incomes and levels of education
- They are parents of preschool children and primary school-aged children
- For them life is one of extremes – they have responsibilities both at work and at home
- They need to pre-prepare for a holiday with children
- The holiday must satisfy the following conditions:
  Convenient destinations: convenient beaches, entertainment and theme parks and centres, contents adjusted to young children
Services: destinations must offer services adjusted to families with young children, such as restaurants, shops...

- Parents have forgotten how to enjoy “Me-time” and are used to putting their children’s needs and desires first
- They are likely to travel during the main season – since their holidays depend on school responsibilities and activities
- Parents may also sometimes take out of peak season short breaks, without the children

Preferred products

- Sun&Beach products with appropriate contents
- City breaks

Motives

- Passive holiday and swimming
- Activities
- Entertainment
- Moderate prices
- Sports activities and recreation (adjusted)

Success factors

- Service quality and the offer adjusted to children - beaches
- Animation programmes
- Abundance of entertainment and activities
- Value for money, orientation towards family values
- Online services availability (internet, portals, news, destination activities reviews)
- Transport availability
- Sports activities, excursions

Families with older kids

- People aged 35-45
- They often have responsible jobs, different incomes and levels of education
- They are parents of teenagers (high school-aged children)
- They prefer going to cool places – the mixture of family atmosphere and entertainment
- Holiday must be adequate for both groupings:
  - Parents appreciate: joint activities, sometimes without children, slow paced activities, spending time with their children
  - Children need: more activities, controlled environment (safety), variety of contents and entertainment
- Parents are aware that that there is only a short time left before their children will be independent, so they still want to spend time with them – family values
- Holiday with compromises – the older and younger
- They are likely to travel during the main season, sometimes during the seasonal holidays – since their holidays depend on school responsibilities and activities

Preferred products

- Sun&Beach products with appropriate contents
- Active&Adventure products
- City breaks
Recommendations for Further Development

- Nautical tourism and cruising

Motives
- Activities
- Entertainment
- New experiences
- Moderate prices
- Rest and relaxation
- Shopping

Success factors
- Service quality and the offer adjusted to both young people and adults
- Abundance of entertainment and activities
- Animation programmes
- Value for money
- Online services availability (internet, portals, news, destination activities reviews)
- Transport availability
- Beaches and seaside activities
- Sports activities, excursions

Market segments and time dispersion of the Year

January February March April May June July August September October November December
RECOMMENDATIONS FOR FURTHER DEVELOPMENT

When we talk about the Golden Oldies segment we talk about foreign pensioners who are solvent and who have time and interest in maintaining health so it is possible to create packages lasting for several weeks/months considering the price competitiveness of the offer in the subject areas of the Tourism Region Western Serbia and Sarajevo Macro Region.

Seasonality of the tourism demand of the defined market segments is clearly visible so it is necessary to bear it in mind when products portfolio is adjusted in order for service providers to be successful in business throughout the year.

As for formulating the joint tourism product in the subject area, the performed analysis clearly indicates that it is necessary to make efforts in the following period in order to provide a clear base and to define unique sales proposals that would ensure a successful commercialisation of the product.

Present marketing efforts and practice of tourism product development in the subject area are characterised by a lack of any planning approaches. That is why it is necessary to accept the following constatations:

- Creating a product must be aimed at business activities throughout the year and not only at one season;
- Supply has been formulated so that "everything is offered to everyone", and that makes standardisation, specialisation, carrying out an adequate quality assurance policy and successful market positioning impossible;
- Therefore it is necessary to abandon the concept of supplying the whole tourism market so that "whoever comes, they are welcome", and to use advantages of the market segmentation concept;
- Invested hard work and effort of certain service providers has been scattered for there has been a lack of coordination among different stakeholders. It led to suboptimal use of resources – it is necessary to provide continuous strategic leadership and coordination mechanisms.

It has already been noted that each successful commercialisation is preceded by a compulsory market research. Bearing in mind the characteristics of the area, the existing offer touristification level, characteristics of the health tourism product and adequate market segments, we propose the resource complementarity of micro destinations to be used in the cross-border area as well as formulating the joint tourism product on the basis of the mentioned idea (as described below) on formulating the "The Balkans Health Map" as a basis for entering the regional market and wider tourism market.

"The Balkans Health map" is a result of the possible market positioning of the area as the "Balkan Oasis of Well-Being and Health" and represents a system that would offer an appropriate set of treatments in accordance with understanding the needs of an adequate market segment – the offer could certainly not be the same for managers and (foreign) pensioners, for instance. In this case, both market segments are solvent but managers have no free time (they are "time poor"), and pensioners are "time rich". Accordingly, the first group cannot afford longer stays at hotels in the subject area but the second group can afford them.

- The idea is to create a framework for realisation of the "tailor made" prevention programmes or treatment of indicated states for adequate market segments.
- Adjustment of each individual treatment is done based on the general framework/instructions.
RECOMMENDATIONS FOR FURTHER DEVELOPMENT

- Service providers included in the program realisation (institutions, hotels and other facilities) are connected through a unique database and they have insight in check-ups/treatments of each programme user.
- The programme encompasses a set of treatments that are already part of the existing offer and they are not necessarily realised within one visit; the programme would rather encompass several separate visits (taking into consideration time poor and cash rich segments) but it should also offer a form of continuous monitoring and interaction with the users.
- A possible way to achieve monitoring and interaction with the users is development of the mobile phones application containing a reminder with the alarm for certain activities (diet, exercises, prescription medication and supplements for treatments).
- During each visit to a certain institution (in accordance with the programme) an adequate progress control would be done. The users would always have a help desk at their disposal (by phone or e-mail, integrated in the mobile application) depending on the type of treatment and the institution where it was prescribed.
- The application would also represent a kind of a loyalty card and a passport for institutions/hotels and other service providers in the network (restaurants, local products shops, gift shops, beauty salons, etc.) so that the users could be privileged every time they come there.

Some of the measures that could achieve short-term results include the following:

1. Improving the existing health programmes aimed at the target market segments – the programmes that have already been applied but can be widened and deepened through mutual cooperation of the service providers in the subject area (the ones directly involved in the Cross Spa project), on the basis of joint platform for users monitoring;
2. Creating and introducing new programmes depending on the market needs (as already described);
3. Using the opportunity to combine the treatments already existing in the offer with the concept of geomedicine and geotherapy – a form of muscle manipulation that uses special focused techniques including hot and cold stones therapy and massage to promote good health and balance in the body, mind and spirit;
4. Adjusting a part of facilities to the definition of "healthy hotels" and "healing hotels", at least in the season of high tourism demand;
5. Introducing the offer of the outdoor health tourism – a therapy based on overcoming adequate (controlled) obstacles in the natural environment as a part of rehabilitation aimed at regaining strength, gaining skills and overcoming challenges so that "patients" could return to their active lives. These activities can include the adventure contents as part of the standard wellness offer ("adventure based therapy" and "wilderness therapy");
6. Introducing complementary and alternative techniques as part of the medical wellness offer and training personnel to perform them:
   a. Complementary techniques, treatments and therapies are mainly not focused on treating a disease but on diminishing the side effects and stress caused by the conventional treatment. They are aimed at providing the general well-being of a

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6 Horwath HTL has adjusted the list of the suggested measures according to the initial proposal of Dr Gorana Isailović
patient. Alternative techniques are applied instead of conventional medicine for the purpose of contributing to healing of a patient;

b. Complementary and alternative techniques include the following:

I. therapies with placing hands (chiropractic, osteopathy, shiatsu, reflexology, aromatherapy and therapeutical touch);

II. invasive therapies (acupuncture, therapeutic irrigation, chelation therapy, etc.);

III. therapies with products (homeopathy, herbology, ayurveda, aromatherapy, Bach flower therapy);

IV. energy medicine (spiritual healing and prayers; using crystals, frequencies and channels; reiki, therapeutical touch, acupuncture, shiatsu, tai-chi, qigong);

V. psychological interventions (hypnosis, counseling and psychotherapy);

VI. self-help techniques (yoga, meditation, visualisation, self-hypnosis, relaxation techniques, etc.)

7. Contemplative tourism and forest hammams – guided tours through natural environment and using the natural configuration of the terrain and water (springs, streams) for therapeutical purpose – visits to mystical and magical places, sacral objects in the surroundings, etc.

8. Creating special programmes for families with children – promotion of the "family wellness" concept. Existing facilities/ parts of facilities should be adjusted to the wishes and needs of the families with children (various programmes for families with young kids and families with older kids) that would include gyms, fitness centres, pools and space for children (playgrounds for young kids and some kind of adventure parks for the older ones).

Additionally, the latest trends indicate the exceptional popularity of the "healthy schools" where the whole families learn about the healthy style of life so it would be a good idea to include such a programme in the offer.

9. Improving the existing programmes in accordance with the natural ambience and traditional medicine heritage – combining treatments and therapies with using local traditional products and medicinal herbs. The unique wellness concept would include the use of the local products in traditional techniques (for instance, raspberry massage, walking on raspberries), meditation on oat mattresses, aerobics, stretching exercises and workouts in nature (fitness zone); incorporating traditional games (knight games, entertainment games, spirit games, etc.) in the wellness concept (e.g. traditional dance – kolo, traditional game – klis); wellness garden – meditation in plum, apple or any other characteristic fruit orchards; vital bar – preparing teas with local medicinal herbs and fruit and vegetable juices; creative workshops - ethno body art, etc.
10. "Selfness" programmes – beside wellness as a state of the absence of disease and aiming to quality way of life, the selfness programmes encompass contemplative techniques aiming at self-understanding and self-knowing, and treating the body, emotions and spirit consciously during the whole life. Selfness helps people become aware of their values and faults as well. Emphasis is placed on harmonising goals and the way of life with potentials of each individual. Just like wellness, it includes classic treatments (thermal water, massages, enjoying food, etc.) but there are also adequate interactive and educational workshops organised. It is possible to include yoga, breathing exercises, preparing specific types of food (e.g. gluten-free), natural cosmetics manufacturing, weaving and fabric painting, collecting herbs and preparing teas, food and wine matching, honey and honey products, ethno-body art, school for traditional food dishes, etc.

Successful implementation of the previously mentioned proposals must be preceded by a serious market analysis based on the primary research of the target markets.
5.3 ESTABLISHING HEALTH TOURISM CLUSTERS

<table>
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<tr>
<th>Measure: 1</th>
<th>Establishing Health Tourism Clusters</th>
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**GOALS**

- Building a platform to enhance cooperation between the most important stakeholders at the cluster level
- Improving the general level of health tourism competitiveness through identification and articulation of the cluster members' joint interest and using synergetic effects in the form of joint efforts, coordination and planning improvement

**MEASURE DESCRIPTION**

For more efficient development and articulation of the service providers' interest in the health tourism domain in the subject area, it is recommendable to join efforts, knowledge and resources in order to have a successful approach to the international market entry. The satisfactory level of competitiveness is based on the public-private cooperation, and establishing clusters should provide a special form of it.

Therefore, forming the health tourism clusters is proposed as a platform for cooperation between the main stakeholders within the cluster and joint communication with the main decision makers. The cluster’s goal is enhancement of the general level of competitiveness of the economic entities operating in the health tourism sector primarily through identification and use of synergetic effects in the form of joint efforts to increase competitiveness, to get more efficient marketing, to improve coordination and for joint planning and using the internal and external know-how.

The Cluster gathers leading experts in the fields of medicine, health industry, wellness and spa tourism and other related activities who, with their experience and knowledge, want to improve the existing institutions and economic entities in order to improve the quality of delivered services and products and to have the joint approach to the domestic and international markets. In addition to that, the Cluster as a certain form of service in cooperation with its strategic partners ensures more favorable conditions of supply, organizes education through the Resource Centre and promotes its members’ interests.

The Cluster coordinates efforts aimed at defining new products or improving the existing ones, carries out researches through the Resource Centre, works on identification of products and markets with a bigger potential, develops strategies for creating products and marketing, creates reports, attracts partners and works on building the stable administrative structures and systematic environment. The goal is creating a platform of cooperation that will enable a proactive approach to products and markets by the supply factors in the Cluster.

Managing the Cluster is a responsibility of the regional tourism and development organizations that will partially finance the activities. However, for the business and financial sustainability it is necessary to ensure the additional financing by the tourism supply representatives within the Cluster.
BASIC TASKS IN THE REALISATION PROCESS

Basic steps imply a set of elements that must be seen integrally and their carrying out can create the synergetic effects:

1. Establishment of a platform for cooperation and incentive of the stakeholders through creating a set of rules and procedures for the cluster operation
2. Organization of the first working meeting and the presentation of goals to the public
3. Forming operating programs and plans
4. Constantly maintaining interest of all the entities in the cluster
5. Identification of bottlenecks in the systematic framework and the coordinated work on their removal
6. Identification of the basic products, value added products and creating the list of possible experiences
7. Selection of members, their networking and work on projects
8. Organization of monthly meetings for the interactive participation and dealing with different challenges with the purpose of making specific development proposals

CRITICAL SUCCESS FACTORS

- Creating formal basis, rules and commitments of the cluster members
- Defining strategic basic products that the new products and experiences should be added to
- Motivation of the economy and public sector representatives for participating in the joint activities
- Building mutual trust, taking joint stands, planning and lobbying

KEY ENTITIES INVOLVED IN REALISATION

- Development agencies within the cluster
- Regional and local tourism organizations
- Private sector, professionals in the local tourism sector and other entities as tourism supply stakeholders
## 5.4 DEVELOPMENT OF RESOURCE CENTRE

### 5.4.1 Establishment of resource centre

<table>
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<th>Measure 2</th>
<th>Development of Resource Centre</th>
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<td></td>
<td><strong>GOALS</strong></td>
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<td></td>
<td>▪ Elevating the level of knowledge and strengthening skills of the employees in the health tourism sector</td>
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<td></td>
<td>▪ Know-how in the domain of services quality standardization in health tourism</td>
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<tr>
<td></td>
<td>▪ Monitoring modern trends in the global market in the health tourism domain</td>
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### MEASURE DESCRIPTION

The Resource Centre of the cross-border region is the knowledge centre whose primary role is the human resource capacity building i.e. education in the domain of general knowledge and carrying out trainings for development of the health tourism personnel specific skills as the key success factors in satisfying the visitors’ needs and expectations, providing an adequate value for money, and consequently elevating their level of satisfaction and loyalty. Second, the centre should be involved in monitoring the modern quality standards in the health tourism service delivery and gathering information on the best practice examples in the industry. Third, the centre should be involved in analyzing the modern trends in the health tourism, in organizing seminars/conferences so that the decision makers from the public and private sectors are provided with the high-quality platform for decision making.

1. Education and training programs

Given the fact that there is a huge gap in the market between modern requirements of the industry and the available education system, carrying out education and training programs represents one of the top priority projects in the health tourism. We believe that the systematic adjustment of the education process to the modern industry requirements is necessary – at present, no education institution in the territories of Serbia and Bosnia and Herzegovina includes the health tourism education. The field of health tourism is extremely interdisciplinary; it includes knowledge about tourism, health care, medicine, marketing, management, finance, human resources, etc. Therefore, the program taking into account the health tourism development level in the subject area, the existing education system and modern trends in the global market should be formed. In the domain of education, we believe that cooperation with the existing tourism schools and faculties is necessary, especially in the following domains:

- Creating educational content of the program by taking into account the industry’s needs
- Providing support to carrying out the program
- Providing health tourism experts, instructors and teachers as lecturers
- Program promotion
- Controlling results

Examples of knowledge and skills that should be encompassed by the training programs:

- Management: human resources, economy and finance, marketing, etc.
RECOMMENDATIONS FOR FURTHER DEVELOPMENT

- Services: service quality, satisfying visitors’ needs and expectations, etc.
- Accommodation facilities: reception desk, concierge, room department, etc.
- Restaurant: chef, cooks, waiters, etc.
- Sales and commercialization techniques
- Health tourism legal framework
- Prevention and rehabilitation as the health tourism product

2. Know-how in the domain of the service quality standardization

As we have already stated in the analysis of existing facilities, there is a lack of examples of comparative practice that would serve as a framework for restructuring and repositioning the existing supply – i.e. which internationally recognized quality standards in health tourism should be reached in further supply development. Therefore, we believe that the centre should summaries standards and quality seals developed by certain markets (Germany, Great Britain, USA, Europe) and define a set of criteria that need to be considered in the evaluation process.

Monitoring examples of the best practices is necessary as a reference point for development of the standard operating procedures (SOPs) for individual facilities in the health tourism domain.

Standard operating procedures (SOPs) represent a document defining a way the entities operate in order to deliver products and services to the client. SOPs is a document defining the business policy of an enterprise and the service delivery procedures and it includes the following:
- Service delivery process maps (algorithm)
- Business policy
- Procedures for the service delivery method
- Formats and checklists

Defined procedures provide maximization of business efficiency, consistency in service delivery and a framework for carrying out the personnel training.

3. Monitoring modern trends in the global market in the health tourism domain

The Resource Centre should be involved in gathering the existing available data/analyses on the modern market trends. We believe it is necessary to establish connection with the world’s recognized experts and to establish the basis for the continuous monitoring of trends in the health tourism domain through the regular organization of seminars/conferences.

BASIC TASKS IN THE REALISATION PROCESS

Basic tasks in the Resource Centre realization process are following:
1. Establishing the Centre by the Cross-Border Area Health Tourism Cluster
2. Providing the way of financing (membership fees, cross-border programs, public sector)
3. Creating the Centre’s rulebook and procedures
4. Forming programs and work plans

CRITICAL SUCCESS FACTORS

- Creating a formal basis for the Centre’s functioning
- Providing the Centre financing
- Motivation of the industry representatives for participating in the Centre activities

KEY ENTITIES INVOLVED IN REALISATION

- Representatives of the Cross-Border Area Cluster
- Private sector and other entities as the industr y representatives
5.4.2 Proposal for trainings and education

Proposed concept of a resource center emphasizes the necessity to promote knowledge and skills in the following areas: strategic planning (targeting top level management) and tactical/operational planning (middle management and executives). For the key players in the targeted area, it is necessary to implement tailored training packages designed to raise the quality of services by international standards as well as to increase revenue and profits of individual companies at the same time. For the top level management is essential to organize a set of training/workshops designed and conducted by relevant international experts in order to create understanding of following health tourism issues:

- Target market and the needs of the target segments;
- Contemporary trends in the field of medical tourism and its sub segments (spa / wellness, rehabilitation and therapeutic and medical tourism);
- Procedures formulation and constant actualization of a competitive tourism product based on unique selling proposals of the area (resource and attraction basis, heritage and tradition combine with the modern approach);
- Policies and quality assurance systems;
- Marketing, promotion and use of information and communication technologies.

Permanent education of employees is investment which leads to improvement of quality of offer and satisfaction of guests.

Proposed mode is divided into three segments:

1. Monitoring with a focus on quality standards (appearance, hygiene, technical requirements, quality of work, etc...), analyzes the current situation and report preparation;
2. Developing and defining all the required standards - SOP;
3. Implementation of the standards through trainings and education

The following trainings are important for business improvement:

1. Training & Coaching for Department managers (Head of Departments)
2. Training for restaurant staff
3. Training for staff in the sector of kitchen
4. Training for staff in the sector desk / reservations
5. Training for staff in the sector of households
6. Training for staff in the Spa sector

In addition, we believe that special tailor made training for the management of each individual sectors.

Development and implementation of labor standards

- Development of SOP in the area of service and its implementation
- Development of SOP in the area of the kitchen and its implementation
**Recommendations for Further Development**

- Development of SOP in the area of reception and its implementation
- Development of SOP in the hotel segment and its implementation
- Development of SOP in the segment households and its implementation
- Development of SOP in the area of spa services and its implementation

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<td><strong>“Guest Expectations meets Guest Experience” for HoDs</strong></td>
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<th><strong>Trainings for Customer Contact Personnel</strong></th>
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<td><strong>Workplace behaviour</strong></td>
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<td><strong>How much we are familiar with our hotel/spa?</strong></td>
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<tr>
<td><strong>Guest Expectations meets Guest Experience</strong></td>
</tr>
</tbody>
</table>

| **Trainings for the Restaurant Personnel** |
### Recommendations for Further Development

#### Service basics
- Table setting
- Serving and clearing tables
- Opening a wine and champagne bottles
- Preparing and serving hot drinks
- Clean and efficient work
- Best service tips

#### Product training
- Food in our facility
- Drinks in our facility
- Other offer in facility

#### Trainings on sales techniques, quality improvement and revenue boosting
- Pay attention to guests
- Action sales
- Orders receiving
- How to advise the guest?
- Best sale tips

#### Training for Kitchen Personnel (Kitchen Monitoring)
- Modern presentation of food on the buffet table and its composition on the plates
- Calculation of menu prices
- Groceries shopping economically
- Kitchen organization
- Kitchen hygiene - HACCP

#### Training for Reception/Reservation Personnel
- Reception basics
  - Attitude towards guest
  - Check in
  - Check out
  - Shift handover
  - End of day
- Reservation basics
  - The basics of communication over telephone
  - Booking the individual reservations
- Revenue management
- Online marketing

#### Trainings for Housekeeping Personnel
- Room set-up
  - Bathroom set-up
  - Setting up the room elements
  - Minibar set-up
### Recommendations for Further Development

#### Room cleaning
- Right of access to guest’s room
- Progressively room cleaning
- Progressively bathroom cleaning

#### Equipment and procedures
- Floors cleaning
- Windows cleaning
- Removing a carpet stains
- Storage room/pantry and inventory setting
- Trolley/maids cart setting
- Linen/laundry procedures
- Schedule of commitments

### Training for Spa Sector Personnel

#### How to treat guests in spa sector
- Treatment reservation and reception (make first impression, greeting the guests, guest check in and check out)
- Guest complaints and employees response
- Communication with guests

#### Treatment protocol manual
- Customers’ privacy
- Customer reception (treatment and relaxation rooms)
- Treatment protocol (for each treatment)
- Communication with guests during the treatment
- Post treatment protocol

#### Hygiene in spa sector
- Treatment rooms cleaning and maintenance
- Relaxation rooms cleaning and maintenance
- Locker rooms cleaning and maintenance

#### Food and beverage in spa sector
- Creation of the menu template for F&B sector
- Creation of the list of permitted ingredients for F&B sector

#### Development of new treatments and new offers
### 5.5 INTEGRISANI MARKETING SISTEM ZDRAVSTVENOG TURIZMA

<table>
<thead>
<tr>
<th>Measure 3</th>
<th>Health Tourism Integrated Marketing System</th>
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**GOALS**

- Identification of business opportunities for the cluster service providers through getting to know the defined target groups better
- Building the image of the health tourism cluster and of the space it covers in general and its importance among the tourism industry representatives and among tourists
- Better image of the health tourism cluster service providers among visitors, operators, investors, etc.
- Larger number of bookings
- Gaining better insight into potential tourists
- Increasing the sales of products and services of the domestic companies directly to tourists
- Increasing the realization through tourism mediators
- Better relationship with the media and media coverage
- Organization and centralization of the contact information (mediators and end users – visitors and tourists)
- Tenderers differentiation within the cluster and contributing to the overall improvement of the tourism product quality
- Facilitated planning, recognizing and selecting the service among various options by tourists
- Better foundation for the realization of marketing efforts of the quality service providers in tourism
- Making tourists attached to the destination by the quality marks
- Improving the tourist and visitor experience
- Creating unique experiences for tourists and visitors
- Better management of the tourists flows
- Investments concentration
- Creating values for the cluster members through the innovative combination of products and services

**MEASURE DESCRIPTION**

1. **Market research and monitoring modern trends of the health (wellness&spa) tourism** - as we have already mentioned in the analysis of the health tourism products and trends, this market is rapidly developing, and it has a growing offer of complex and sophisticated products aimed at narrow niche market. In that context, the need for the right information is essential since it in turn influences the offer actualization/timely reaction in accordance with the expectation of the wanted market segments. So, it is necessary to build a system of
getting relevant and updated market information which will provide help for directing the marketing efforts of the health tourism cluster and facilitate making quality decisions. The key activities to achieve the goal are following:

- Regular interviews with tour operators and agencies, mystery shopping (visiting innovative service providers in the health tourism field and using their services)
- Monitoring trends and systematic evaluation of attitudes and needs of tourists in the main emissive markets (by engaging specialized agencies for market research/purchasing information through the channels of professional associations - European Spas Association, ISPA)

Apart from the needed investments in infrastructure, knowing the market, preferences and expectations of the wanted tourists, the key success element is formulating the tourism product competitive in the health tourism.

2. The campaign image – Bearing in mind the history of inherited conflicts and bad image of this region in the European and world markets, it is necessary to make an effort to reposition the region in the potential clients’ minds especially when it comes to perception of safety. This activity must be carried out in cooperation with the national tourism organizations (associations) paying attention to sensitivity of the product portfolio provided by the health tourism cluster members. Agencies already engaged to work on tourism PR for Serbia and BiH should be used in order to carry out a strategy for building a good image of the area for being in the health tourism business. Through the marketing strategy, the health tourism cluster should clearly and in detail define the integrated marketing communication system and a list of topics relevant for building a good image.

3. Internet portal of the health tourism cluster with the online booking system – it is the most significant marketing instrument used by the cluster members to pass their messages, and it will represent the basic communication platform for both the potential clients/services buyers of the cluster members and the cluster members themselves. It is a sort of the "window to the world" for the health tourism cluster. The portal must offer comprehensive, regularly updated and detailed information on the current product and services offers as well as content and tools for booking the majority of the services using the modern technology solutions present in the market. When a tourist enters the portal or when they are redirected to some of its web-pages they must find the offer that will keep their attention and provide sufficient information to make their decision making process easier. The key elements that must be taken into account when establishing the internet portal are following: web page of significant influence – information overload must be replaced with interesting photographs; content offer (about us, treatments you can get, events, additional offer, etc.); possibilities – booking, surveys, micro websites, social media integration, etc; easy navigation.

The biggest challenge in the booking system development that needs to be overcome is getting the reply to the question: who sells what and what is the price? It is essential to enable potential tourists to create their own experience themselves by combining different products and services offered by the cluster members/service providers in the tourism destination value chain. Special offers organized in advance can be offered within the online booking system (package arrangements).
4. **Design and selection of the sales instruments** - encouraging sales through B2B contacts with the identified major tourism mediators. Programs may be realized among the cluster members or by presenting the cluster members’ offer to the specialized mediators and creators of the tourism packages for medical/wellness/spa tourism while visiting them. Additionally, bearing in mind the significance the rehabilitation tourism has, it is necessary to schedule meetings with the health insurance companies of the countries in the region/European countries a few hours away (including a plane flight) for the purpose of presentation and contracting special programs for their policyholders. The role of the tourism organizations/associations that should be partners in realization of this set of activities should be significantly big given the fact that they would be engaged in ensuring contact with the adequate mediators as well as in contracting the adequate meeting space if the potential partners from abroad should be visited. This set of activities also includes visits to the specialized fairs.

5. **Database of Buyers (visitors and tourists)** – this database would actually consist of two parts: database of mediators and database of buyers. The database should contain data on: end users (visitors and tourists), tour operators, tourism agencies, media and journalists, associations, and other entities important for the cluster members’ business missions. Data would be gathered in different ways: directly from the cluster members or through the internet portal which represents one of the channels with the greatest potential but any other means of communication (online marketing) must have the secondary goal of getting as many contacts and details as possible in order to fill the database.

6. **Online marketing** – online instruments are aimed at increasing the target markets awareness of existence and supply of the health tourism in the subject market. The goal is increasing the number of visits to the main internet portal. All the instruments for improving visibility and information flow are used, from improving browser options, interactive banners, to promotional messages and similar tools. Interactive banners will be set up on the most commonly used browsers and active links will be set up on the mediators’ websites. Promotional messages are becoming significant since the tourists increasingly use internet. The social media (networks) marketing also belongs to this set of tools – the leading principle should be “engaging in conversation”. It is certainly one of the most important tasks for the team of the company engaged in internet and online marketing. There are several tools that should be monitored and properly managed - Youtube, Facebook and Twitter being the most important ones. However, webpages with the content created by the users should be monitored, too (Trip Advisor, Trivago, etc.). The point is to be sufficiently active in the process of entertaining users on the social networks in order to get so-called “user-generated” content, which, from the aspect of the tourist who is buying, has a great significance in making a decision what specific offer to buy.

7. **Voluntary marking system** (in relation to established standards and quality assurance system) – Creating marks (labeling) has a goal to improve communication with a tourist by developing a labeling system that enables classification of the tourism products and services with providers according to the amount of certain characteristics and experiences they possess. The system is based on the initial determination of the level that is a starting point for measuring the amount of defined quality and specific attributes. Labels have a special significance for emphasizing varieties and quality of the offered products and experiences (e.g. some products are adjusted to persons with disabilities, little children, couples, etc.). The selection of the labeling criteria should certainly be the starting point and they can contain both qualitative and quantitative elements. This activity is tightly connected with the
**RECOMMENDATIONS FOR FURTHER DEVELOPMENT**

Resource Centre activities and mission since its goal is to identify and improve the best practice and to turn it into the symbol language understandable to tourists – the quality of experience is guaranteed.

**8. “The Balkans Health Map”** (innovative connection through offering the combination of various products to the specific target groups) – Bearing in mind that the procedure of inventorisation and scanning of the present offers in the health tourism domain in the subject region unambiguously established that there is the tradition of treatment and rehabilitation and bearing in mind that the cycle of investments in facilities and in hospitality service quality increase is assumed, we propose, within our elaboration of the cross-border cooperation potential, an innovative form of bringing together existing/future service providers in the health tourism adjusted to the specific target groups. We are proposing the creating of tailor-made programs for certain users of the service of prevention/treatment of states indicated for them (e.g. programs for managers, women, rejuvenation, weight loss, detox programs...), that would include a selection of treatments from the portfolio of the existing/future services. So, it is not about packages that would include one trip but packages including a series of trips forming a unique treatment as a meaningful unit (e.g. combination of obesity treatment program, heart disease prevention, anti stress therapies, beauty treatments, etc.), with the complete treatment lasting for 6 months or a year including the time between the therapies. If the offer includes the premium product, it would be good to ensure monitoring of the general health improvement/client’s capacity during the treatment/after the whole treatment is realized.

**BASIC TASKS IN THE REALISATION PROCESS**

1. **1.1. Introducing regular survey of guests of the cluster members service providers as well as survey in cooperation with the destination marketing stakeholders (in the Tourism Region of Western Serbia – Regional Tourism Organization, local tourism organizations of Zlatibor, Zlatar, Ivanjica, Priboj; in the Sarajevo Macro Region – tourism associations of cantons);**

2. **1.2. Introducing the procedure of drafting regular semiannual/annual reports on the relevant market according to the predefined content and in accordance with the information needs of the specific cluster members**

3. **2.1. Identification of the PR agency in the wanted markets (in cooperation with the national tourism organizations/associations)**

4. **2.2. Appointment of the PR coordinator**

5. **2.3. Defining the messages that should be sent and a favorable moment for achieving the greatest effects in cooperation with the agency**

6. **2.4. Monitoring the influence of activities in the relevant markets (in cooperation with the national tourism organizations/associations and the engaged agencies)**

7. **3.1. Appointment of the internet portal editorial board**

8. **3.2. Defining the functional structure and basic tools to be used**

9. **3.3. Engaging a relevant partner with the experience in realizing similar ICT works**

10. **3.4. Integration of all the tools and components**

11. **3.5. Defining channels and communication procedures that will guarantee regular updating of the information/offer**
4.1. Logistic preparation of the workshop
4.2. Identification, selection and invitation of the potential mediators via internet
4.3. Each cluster member prepares and organizes their own sales dossier
4.4. Sending sales dossiers to the invited mediators
4.5. Organization of the workshop and coordination of the conversations
4.6. Organization of the visits to the cluster members and their offer review
4.7. Identification and participation in the specialized fairs with the supporting logistics

5.1. Purchasing the software for the database management
5.2. Customizing application – building a data entry interface, research and report writing interface
5.3. Development of data entry and data approach systems via internet
5.4. Data entry (by the local tourism offices, hosts, managers internet portals, etc.)
5.5. Training of personnel that will be in charge of the database administration

6.1. Selecting key tools that will be implemented
6.2. Negotiations with the most significant online agents (Google, Booking.com, hotel chains, etc.) in the search for good conditions, space and time frame
6.3. Online pressures should be in time accompanied by the offline campaign in order to maximize the investment effects
6.4. Monitoring of the influence of activities in each market in order to get adjusted to the following work cycle. Possibilities for measuring online activities are numerous and cheap
6.5. Organization of training of people who will deal with online activities and the social media activities

7.1. Defining of the criteria and specifications for each label that will be in use
7.2. Defining the names and symbols that will be used for each label
7.3. Communicating the characteristics of each label to the market participants using the ad-hoc campaigns
7.4. Controlling the labels use in order to guarantee to all third parties (especially to visitors) that the entities with those labels meet all the previously defined special requirements in regard to quality
7.5. Defining an adequate graphic symbols that will communicate to tourists. The symbol may be used by all the mediators and tourism value chain players who got the right to use the label in their communication materials and marketing campaigns

8.1. Creating the expert work group that will propose the combination of various therapies/treatments, the duration of each treatment and of the complete treatment in regard to the target group
8.2. Initial market potential assessment of a segment/product
8.3. Procedure of the product commercialization through marketing channels of the health tourism cluster

CRITICAL SUCCESS FACTORS

- Accuracy and depth of the defined research goals
RECOMMENDATIONS FOR FURTHER DEVELOPMENT

- Quality of the survey process realization – from preparing the questionnaire to processing the acquired data
- Relevance of the prepared reports for the sector performance improvement
- Selection of an adequate agency: the one that can enable coordinated activities (by monitoring a global strategy) but can also understand the local differences and specificities
- Defining a fundamental PR strategy that is generally applicable and coordination with the specificities at the local level
- Active cooperation and readiness of the companies in the Zlatibor and Zlatar tourism business to introduce their offer to the internet portal
- Flexible booking system that will enable online booking in the broadest sense
- Attractive design
- Multiple and coordinated web portal contents
- Intensive use of the portal that contributes all the communication activities
- Starting with a special campaign for the new portal promotion (information + attractiveness)
- Keeping pace with market movements and the brand new trends in order for online tools to be used in an adequate way and for their use to be customized
- Offering attractive, useful and comprehensive online content that a tourist can offer to their friends
- Gathering contact details from the web portal visitors in order to enlarge the database
- Creating special content for online communication and customisation
- Careful selection and implementation of adequate and previously defined criteria for each label
- Successful implementation of labels in the entire marketing channel system as categories (a sort of “navigators”), especially in online information on the destination and booking system
- Monitoring reactions within the sector as well as service users in order to identify potential room for improvement
- Capacity/ability for focused development of the combination products/treatments
- Selection of the financially solvent target groups

KEY ENTITIES INVOLVED IN REALISATION

- Cluster members – service providers in health tourism
- Regional and local tourism organisations, tourism associations
- National tourism organisations
## 5.6 USPOSTAVLJANJE SISTEMA FACILITACIJE INVESTICIJA

<table>
<thead>
<tr>
<th>Measure: 4</th>
<th>Establishing a system of Investment Facilitation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GOALS</strong></td>
<td></td>
</tr>
<tr>
<td>▪ Creating the investment facilitation system through establishing and managing the investment basis, prioritization of investment projects, and providing assistance in preparation of projects for the investors market entry</td>
<td></td>
</tr>
<tr>
<td>▪ Improving the general level of competitiveness through active participation in and support to the expected privatization process and bringing in strategic investors</td>
<td></td>
</tr>
</tbody>
</table>

### MEASURE DESCRIPTION

Creation of the destination investment opportunities database as a “one-stop-shop” for potential investors. The database should contain all the essential elements required for understanding the investment potentials, such as defining a legal entity or property that is a subject of the possible transaction, details related to the description of ownership or property, equipment of land and/or facilities, number of employees, balance sheets, and other information that can be significant for a potential investor.

Prioritization of the investment projects, and providing assistance in preparation of projects for the investors market entry, i.e. providing assistance in targeting investors, formulating investment prospects and packages, gathering information on investment opportunities in accordance with the master plans and other planning documents.

Providing assistance in the marketing of the investment opportunities through the online approach (3D models, virtual display, etc). Preparation and organization the appearance at the real estate fairs, road shows and other similar events with all the interested entities.

Participation in material preparation and support in carrying out the calls for searching strategic partners/buyers for the investment projects realization.

Monitoring projects development and providing support to investors.

### BASIC TASKS IN THE REALISATION PROCESS

Basic steps imply a set of elements that must be seen integrally and their carrying out can create the synergetic effects:

1. Establishing the database of the investment opportunities in health tourism
2. Organization of the first working meeting and the presentation of goals to the public
3. Forming operating programs and plans
4. Constantly maintaining interest of all the entities in the cluster/destinations through cooperation and regular consultations
5. Communication with the investors market
6. Identification and promotion of the investment projects
7. Initiation of the development of investment projects and their sustainability
8. Initiation of the Master Plan and other planning documents for development of the health tourism locations
9. Following legal provisions and regulations in association with planning and development of the investment projects in health tourism
10. Systematic monitoring of all the potential funds (projects, tenders, etc.)
11. Monitoring markets with the purpose of making concrete development proposals.

CRITICAL SUCCESS FACTORS

- Creating of the investment opportunities database
- Filling database with quality and relevant information
- Supporting entities by preparing documentation and marketing for the investment opportunities
- Enabling the online approach to the investment opportunities database
- Monitoring and communicating with the potential investors market

KLJUČNI SUBJEKTI UKLJUČENI U REALIZACIJU

- RDA Zlatibor and SERDA as the activity stakeholders in their jurisdiction
- Business entities, tourism activities stakeholders – service providers with the model of state, public, mixed or private ownership
### 5.7 PREGLED MERA PO ROKOVIMA

<table>
<thead>
<tr>
<th>Measure</th>
<th>Main tasks</th>
<th>Responsibility</th>
<th>Terms</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1 Establishment of health tourism cluster</strong></td>
<td>Formal and legal establishment of the cluster</td>
<td>RDA i SERDA</td>
<td>short</td>
</tr>
<tr>
<td></td>
<td>Adoption of the programmes and work plans</td>
<td>Cluster members</td>
<td>short</td>
</tr>
<tr>
<td></td>
<td>Coordination of the members’ activities</td>
<td>Cluster management</td>
<td>continually</td>
</tr>
<tr>
<td></td>
<td>Lobbying / improvement of the existing strategic and regulatory framework</td>
<td>Cluster members / public sector</td>
<td>continually</td>
</tr>
<tr>
<td></td>
<td>Selection of the product clubs and competitiveness clubs</td>
<td>Cluster management</td>
<td>mid</td>
</tr>
<tr>
<td><strong>2 Development of the resource center</strong></td>
<td>Establishment of the center by the Cluster</td>
<td>Cluster management</td>
<td>short</td>
</tr>
<tr>
<td></td>
<td>Provision of the sustainable financing</td>
<td>Management / cluster members</td>
<td>short</td>
</tr>
<tr>
<td></td>
<td>Creation of the rule books and working procedures</td>
<td>Menadžment centra</td>
<td>short</td>
</tr>
<tr>
<td></td>
<td>Development of the specific programmes</td>
<td>Outsourc/konsultanti prema identifikovanim potrebama</td>
<td>mid / continually</td>
</tr>
<tr>
<td><strong>3 Integrated marketing system of the health tourism cluster</strong></td>
<td>Establishment of the cluster marketing system</td>
<td>Cluster management</td>
<td>short</td>
</tr>
<tr>
<td></td>
<td>Market research and monitoring of the modern trends</td>
<td>Cluster management / consultants</td>
<td>short / continually</td>
</tr>
<tr>
<td></td>
<td>Cluster web portal with the reservations system</td>
<td>Cluster management / ICT experts</td>
<td>mid / continually</td>
</tr>
<tr>
<td></td>
<td>Positive image campaign</td>
<td>Cluster management / Specialized agencies</td>
<td>mid</td>
</tr>
<tr>
<td></td>
<td>Design and selection of sales tools</td>
<td>Cluster management / consultants</td>
<td>mid</td>
</tr>
<tr>
<td></td>
<td>Customers database</td>
<td>Cluster marketing system / TO</td>
<td>short</td>
</tr>
<tr>
<td></td>
<td>Online marketing</td>
<td>Cluster marketing system / TO</td>
<td>short</td>
</tr>
<tr>
<td></td>
<td>Good labelling system</td>
<td>TO</td>
<td>mid</td>
</tr>
<tr>
<td></td>
<td>&quot;Balkan Health Map&quot;</td>
<td>TO / cluster</td>
<td>mid / long</td>
</tr>
<tr>
<td><strong>4 Establishment of the investment facilitation system</strong></td>
<td>Creation of the investment opportunities database</td>
<td>Cluster management / RDA &amp; SERDA/ consultants</td>
<td>short / mid</td>
</tr>
<tr>
<td></td>
<td>Filling the database with quality and relevant information</td>
<td></td>
<td>short / mid</td>
</tr>
<tr>
<td></td>
<td>Support to subjects in terms of documentation preparation and marketing of investment opportunities</td>
<td></td>
<td>mid / continually</td>
</tr>
<tr>
<td></td>
<td>Provision of online access to investment opportunities database</td>
<td></td>
<td>mid</td>
</tr>
<tr>
<td></td>
<td>Monitoring and communication with potential investor market</td>
<td></td>
<td>mid / long</td>
</tr>
</tbody>
</table>
CHAPTER 6

Appendix – Inventory of Facilities

STUDY ON JOINT POTENTIAL OF HEALTH AND WELLNESS TOURISM DEVELOPMENT IN THE CROSS-BORDER AREA (SARAJEVO MACRO REGION AND TOURISM REGION OF WESTERN SERBIA)
Besides the key entities of the health tourism offer in a border area, other elements of the health tourism offer have been identified, as well as the review of the potential locations for health tourism development as given in tables below.

### 6.1.1 Facilities in Western Serbia territory

<table>
<thead>
<tr>
<th>FACILITY</th>
<th>HOTEL &amp; SPA “IDILA”, ZLATIBOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourist facility covers an area of 1800m². The hotel consists of four floor and the basement, connected by panoramic lift. The address: Hotel&amp;SPA Idila, Djurkovac, 31315 Zlatibor, <a href="http://www.hotelidila.com">www.hotelidila.com</a></td>
<td></td>
</tr>
<tr>
<td>The year of construction:</td>
<td>2010</td>
</tr>
<tr>
<td>CAPACITIES AND FACILITIES</td>
<td></td>
</tr>
<tr>
<td>Key spa and wellness services and programmes available:</td>
<td>Recreation and relaxation.</td>
</tr>
<tr>
<td>Facilities and equipment:</td>
<td>Indoor swimming pool, Jacuzzi bath tub, dry sauna, Turkish bath, modern gym</td>
</tr>
<tr>
<td>Number and structure of rooms:</td>
<td>8 lux apartments (5 double rooms and 3 studios) and 10 rooms, maximum capacity of 46 guests</td>
</tr>
<tr>
<td>Number of restaurants and capacity:</td>
<td>1 restaurant</td>
</tr>
<tr>
<td>Number of bars and capacity:</td>
<td>Aperitif bar in Spa Center.</td>
</tr>
<tr>
<td>KEY PERFORMANCE INDICATORS (2012):</td>
<td></td>
</tr>
<tr>
<td>Average annual occupancy rate:</td>
<td>85%</td>
</tr>
<tr>
<td>Seasonality: (high season months and low season months)</td>
<td>High season months: December, January, February, July and August Low season months: May</td>
</tr>
<tr>
<td>Market segmentation: 1. Individual guests and group tours participation rate 2. Foreign and domestic tourists participation rate 3. Business and leisure tourists participation rate</td>
<td>1. 20% 2. 55% 3. 10%</td>
</tr>
</tbody>
</table>
Hotel "Jele - Ježevica" is located in Velika Ježevica, the municipality of Požega. The distance from Požega is 16km.

The address: Hotel Jele-Ježevica, Divčibare, Ježevica 31213, www.jelejejicevica.co.rs

The year of construction: In 1999, the first part of hotel (6 apartments, 2 business apartments, restaurant). In 2007, the second part of hotel (19 rooms, the reception office).

<table>
<thead>
<tr>
<th>FACILITY</th>
<th>HOTEL “JELE – JEŽEVICA”, Požega</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Hotel &quot;Jele - Ježevica&quot; is located in Velika Ježevica, the municipality of Požega. The distance from Požega is 16km. The address: Hotel Jele-Ježevica, Divčibare, Ježevica 31213, <a href="http://www.jelejejicevica.co.rs">www.jelejejicevica.co.rs</a></td>
</tr>
</tbody>
</table>

### CAPACITY TO PROVIDE SPA AND WELLNESS SERVICES

**Key spa and wellness services and programmes available:**
- Wellness and fitness activities, sports activities.

**Facilities and equipment:**
- Sauna, Jacuzzi bath tub, swimming pool.

### CAPACITIES AND FACILITIES

**Number and structure of rooms:**
- 6 apartments (French bed + additional bed, fridge, mini-bar, balcony, TV); 2 business apartments, (bedroom with a French bed, living room with armchairs and additional bed, air-conditioner, mini-bar, TV); 19 rooms (3 triple rooms with balconies, 14 double rooms and 2 rooms with a French bed)

**Number of restaurants and capacity:**
- 1 restaurant, maximum capacity is 50 guests + closed restaurant terrace holds up to 50 people; congress hall for 100 guests.

**Number of bars and capacity:**
- 1 bar, maximum capacity is 15 places.

**Other:**
- Opened terrace overlooking the pool, sport fields (mini pitch, volleyball, basketball and tennis courts), billiards, table soccer, table tennis, library, gym, a car park for 30 cars.

### KEY PERFORMANCE INDICATORS (2012):

**Average annual occupancy rate:**
- 30%, mostly children during the outdoor classes in nature and the athletes during the preparations

**Seasonality:**
- High season months: May, June, July, August

**Market segmentation:**
- 1. Individual guests and group tours participation rate
- 2. Foreign and domestic tourists participation rate
- 3. Business and leisure tourists participation rate
- 1. Group tours - 80 % (including groups of children)
### APPENDIX – INVENTORY OF FACILITIES

#### HOTEL “LOGOS”, Ivanjica

Hotel "Logos", location Katići, 14km from Prilike and 22km from Ivanjica, next to the regional road Prilike - Jasenovo - Kokin Brod. Building is located at an altitude of 1,024 metres. There are two mineral springs in a close vicinity: Prilički kiseljak (water regulates digestion, ulcer in the duodenum and stomach, gallstones, eye inflammation) and Savina Voda mineral spring.

The address: Hotel Logos, Katići, Ivanjica 32253, www.hotellogos.rs

<table>
<thead>
<tr>
<th>The year of construction:</th>
<th>1987</th>
</tr>
</thead>
</table>

### CAPACITY TO PROVIDE SPA AND WELLNESS SERVICES

- **Key spa and wellness services and programmes available:** Sauna, Jacuzzi bath tub.
- **Facilities and equipment:** Two saunas, Jacuzzi bath tub and outdoor swimming pool.

### CAPACITIES AND FACILITIES

- **Number and structure of rooms:** 19 accommodation units: 4 single rooms, 5 double rooms, 8 apartments without a kitchen
- **Number of restaurants and capacity:** 1 restaurant for 50 guests
- **Number of bars and capacity:** 1 restaurant for 50 guests
- **Other facilities:** Room for table tennis, billiards, large soccer field

### KEY PERFORMANCE INDICATORS (2012):

- **Average annual occupancy rate:** About 30%
- **Generated revenue:** RSD 2,226,400
- **Seasonality:**
  - High season months: May
  - Low season months: February and November
- **Market segmentation:**
  1. Individual guests and group tours participation rate
  2. Foreign and domestic tourists participation rate
  3. Business and leisure tourists participation rate

- Mostly organized groups of domestic tourists.
**FACILITY:** HOTEL “MIR”, Zlatibor

| The year of construction: | 2012 |

**CAPACITY TO PROVIDE SPA AND WELLNESS SERVICES**

| Key spa and wellness services and programmes available: | Partial, sports and full body massages, reflexology, fitness instructors. |
| Facilities and equipment: | Jacuzzi bath tub, 2 saunas, fitness room. |

**CAPACITIES AND FACILITIES**

| Number and structure of rooms: | 25 accommodation units - 19 double rooms and 6 triple bedroom apartments. |
| Number of restaurants and capacity: | Restaurant with the capacity of 60 seats. |
| Number of bars and capacity: | Cafe terrace comfortably seats up to 30 guests. |
| Other facilities: | Free internet access, kindergarten for children, trim trail |

Hotel is located 500 metres from centre of Zlatibor, surrounded by pine trees.

The address: Hotel Mir, Jovanka Jeftanovic Street, Zlatibor 31315, www.hotelmirzlatibor.com
**APPENDIX – INVENTORY OF FACILITIES**

### FACILITY: HOTEL “MONA ZLATIBOR”, Zlatibor

Nearby centre of Zlatibor, bus station, shopping mall and ethno marketplace.

The address: Hotel Mona Zlatibor, 26 Miladina Pećinara Street, Zlatibor 31315, www.monazlatibor.rs

|---------------------------|---------------------------|

### CAPACITY TO PROVIDE SPA AND WELLNESS SERVICES

<table>
<thead>
<tr>
<th>Key spa and wellness services and programmes available:</th>
<th>Massages, facial and body treatments.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilities and equipment:</td>
<td>Spa capsule, swimming pool with turbojet-geyser-waterfall, sauna, Turkish steam bath - hammam, hydro-massage bathtubs, fitness studio.</td>
</tr>
</tbody>
</table>

### CAPACITIES AND FACILITIES

<table>
<thead>
<tr>
<th>Number and structure of rooms:</th>
<th>120 accommodation units (61 standard rooms, 25 family rooms, 27 superior rooms, 7 suites)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of restaurants and capacity:</td>
<td>2 restaurants, 240 seats.</td>
</tr>
<tr>
<td>Number of bars and capacity:</td>
<td>2 bars, 100 seats.</td>
</tr>
<tr>
<td>Other facilities:</td>
<td>Wellness center, congress center, children’s playroom, business center.</td>
</tr>
</tbody>
</table>

### KEY PERFORMANCE INDICATORS (2012):

<table>
<thead>
<tr>
<th>Average annual occupancy rate:</th>
<th>71%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generated revenue:</td>
<td>RSD 221 million</td>
</tr>
<tr>
<td>Revenue structure: (room, food, beverage, wellness revenue.)</td>
<td>65% rooms, 30% food and beverage, 5% wellness.</td>
</tr>
</tbody>
</table>
| Seasonality: (high season months and low season months) | High season months: January, February, July and August
Low season months: March and November |
| Market segmentation: 1. Individual guests and group tours participation rate | 1. Individual guests 55% |
| 2. Foreign and domestic tourists participation rate | 2. Foreign tourists 27% |
| 3. Business and leisure tourists (participation rate) | 3. Business tourists 44% |
### APPENDIX – INVENTORY OF FACILITIES

**FACILITY:** Hotel "OMORIKA", Tara

At Kaludjerske bare, the most beautiful part of Tara Mountain, lies at an altitude of 1060 metres. Besides the hotel, banquet hall, VIP salon, aperitif bar, confectionary shop, terrace, souvenir shop, hairdresser’s, beauty salon, first aid station, library and many other facilities are available to guests. Favorable climate, large number of sunny days, larch forest and sports fields ensure good conditions for the athletes preparations of various disciplines. Nearby is a grass soccer field, 1,900 metres long trim trail with sports equipment, 10km of walking trails through pine forest, two tennis courts, handball, basketball and volleyball courts, as well as 300 metres long ski trail suitable for ski school.

The address: Hotel Omorika, Bajina Bašta Street, Bajina Bašta 31250, www.hotelitara.rs, “Tara” Military Institution

<table>
<thead>
<tr>
<th>The year of construction:</th>
<th>1977</th>
</tr>
</thead>
</table>

### CAPACITY TO PROVIDE SPA AND WELLNESS SERVICES

- Swimming pool, sauna, gym.

### FACILITIES AND EQUIPMENT

- Half-Olympic sized indoor swimming pool with sauna.

### CAPACITIES AND FACILITIES

<table>
<thead>
<tr>
<th>Number and structure of rooms:</th>
<th>10 apartments and 156 rooms. The maximum capacity of 166 rooms.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of restaurants and capacity:</td>
<td>Restaurants with 500 seats, national restaurant with 120 seats and banquet hall for 80 guests.</td>
</tr>
<tr>
<td>Number of bars and capacity:</td>
<td>Aperitif bar with 100 seats, bar with 70 seats and discoteque for 100 guests.</td>
</tr>
<tr>
<td>Other facilities:</td>
<td>Beauty salon, hairdresser’s, indoor trim trail, automatic bowling, table tennis, billiards room, sports courts (for soccer, basketball and volleyball), trim trail with sport equipment, ski trail and walking trail</td>
</tr>
</tbody>
</table>

### KEY PERFORMANCE INDICATORS (2012):

<table>
<thead>
<tr>
<th>Seasonality: (high season months and low season months)</th>
<th>High season months: May, June, July, August, September and October Low season months: February, March and November</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market segmentation: 1. Individual guests and group tours participation rate 2. Foreign and domestic tourists participation rate 3. Business and leisure tourists participation rate</td>
<td>1. 50% : 50 2. 11% : 89% 3. 30% : 70%</td>
</tr>
</tbody>
</table>
**FACILITY:** HOTEL "PARK", Ivanjica

Hotel Park is located in the very centre of Ivanjica, on the bank of the river Moravica, near the old hydropower plant and waterfall. It is surrounded by beautiful park where soccer and football courts, trim trail and children playground are situated along the promenade. The exterior of the hotel fits perfectly into the natural surroundings.

The address: Hotel Park, Venijamina Marinkovića 10, Ivanjica 32250, www.hotel-park.co.rs

<table>
<thead>
<tr>
<th>The year of construction:</th>
<th>1976</th>
</tr>
</thead>
</table>

### CAPACITY TO PROVIDE SPA AND WELLNESS SERVICES

Wellness programmes includes services that equally affect the health and satisfaction. We offer different types of massages as well as fitness programme.

### FACILITIES

- Indoor swimming pool, hydro-massage bathtub, Finnish sauna, steam bath, fitness room.

### CAPACITIES AND FACILITIES

| Number and structure of rooms: 63 rooms (3 standard apartments and 1 lux apartment, 17 single rooms with French bed, 41 double rooms, 5 double rooms with French bed and 4 triple bedroom apartments) |
|--------------------------|---------------------------------------------------------------|
| Number of restaurants and capacity: 2 restaurants; "Golden oval" - 150 seats; "Waterfall" restaurant - 130 guests. |
| Number of bars and capacity: "Star Inn" bar - 50 guests |

### KEY PERFORMANCE INDICATORS (2012):

- Average annual occupancy rate: 60%
- Generated revenue: RSD 46,684,521.85
- Revenue structure: RSD 12,133,483.50 room revenue; RSD 19,145,087 food/beverage revenue; RSD 13,405,951.35 other revenue.
- Seasonality: High season months: August Low season months: December
- Market segmentation: 1. Individual guests and group tours participation rate 2. Foreign and domestic tourists participation rate 3. Business and leisure tourists participation rate 1. 30% individual guests; 70% an organized groups 2. 20% foreign tourists; 80% domestic tourists
The „Dunav“ resort is located in the very centre of Zlatibor mountain, surrounded by a pine tree forest. In front of the hotel there are modern shopping center with boutiques, coffee bars, discoteques and market place. Within the hotel complex, there is an open-air restaurant offering to its guests well-known specialties of the domestic and international kitchen. The resort provides the variety of 4-stars services. The resort in not only suitable for vacation and recreation, but also for the stay and preparations of athletes. In the vicinity there are sport terrains for soccer and tennis, big recreation center and an outdoor and indoor swimming pool. In the nearest vicinity, there are ski trail with ski-lift and the woods are intersected by trim trails.

The address: Duvan resort, Rujanska Street, Zlatibor 31315, www.dunavturist.rs

The year of construction: Built in 1976; Renovated and put into operation on 8th October 2011

### CAPACITY TO PROVIDE SPA AND WELLNESS SERVICES

**Key spa and wellness services and programmes available:**
Wellness: hydro-massage pool, sauna, hot bath, aroma bath, rooms for massage. There is an isolated fitness center fully equipped for relaxation and professional athletes preparations.

**Facilities and equipment:**
Different types of massages (relax, sport, anti-cellulit, lymph drainage), 6 person Jacuzzi tub, hot stone bench, aroma bath, gym and fitness center. Fitness center has a half-professional equipment for cardio training (a racer, steppers and bicycles), dumbbells and weights in different sizes. Manufacturers of the machines are Hammer (Finnlo brand - Germany) and Panatta sport (Italy). Fitness center offers various types of training to its members: body-weight reduction, muscle hypertrophy, physical corrections, athletes conditional preparations, stretching, testing, massages, individual trainings and trainings with instructors.

### CAPACITIES AND FACILITIES

**Number and structure of rooms:**
31 accommodation units: 24 rooms (14 double rooms, 6 double rooms with the additional bed, 2 triple rooms with French bed, 2 classic triple rooms) and 7 suite (1 suite for 4-6 people, 2 suites for 3-5 people and 4 suites for 2-4 people)

**Number of restaurants and capacity:**
One restaurant with the maximum capacity of 105 guests.

**Number of bars and capacity:**
One aperitif bar holds up to 80 guests.

**Other facilities:**
Each room contains a desk, telephone, hairdryer, TV with the IPTV, wireless internet; besides that, apartments has mini bar and a small kitchen; congress hall (150 seats, can be divided into 3 parts; projector, projection screen, flip chart, sound system); VIP salon (12-16 people), gallery room, internet cafe, children’s playroom, safety deposit box (in reception of hotel), free wireless internet in hotel.

### KEY PERFORMANCE INDICATORS (2012):

**Average annual occupancy rate:**
51%

**Revenue structure:**
Revenues: room 73.76%, food 12%, beverage 11.5%, wellness 1.6%, other 1.14%

**Seasonality:**
High season months: January and August
Low season months: March

**Market segmentation:**
1. Individual guests 45%, group tours 55%
2. Domestic tourists 80%, foreign tourists 20%
3. Business tourists 55%, leisure tourists 45%
Spa Iva is located in the very centre of Čajetina, 6km of the centre of Zlatibor, on the road to Belgrade
The address: Spa&Wellness center Iva, Čajetina Centre, Zlatibor 31310,  www.iva.rs

<table>
<thead>
<tr>
<th>FACILITY:</th>
<th>SPA &amp; WELLNESS CENTER “IVA”, Čajetina</th>
</tr>
</thead>
</table>

| The year of construction: | 2011 |

**CAPACITY TO PROVIDE SPA AND WELLNESS SERVICES**

<table>
<thead>
<tr>
<th>Key spa and wellness services and programmes available:</th>
<th>Relax massages.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilities and equipment:</td>
<td>Swimming pool, Jacuzzi tub, sauna (water temperature is 30°C)</td>
</tr>
</tbody>
</table>

**CAPACITIES AND FACILITIES**

| Number of bars and capacity: | Caffe within the spa center. |

**KEY PERFORMANCE INDICATORS (2012):**

<table>
<thead>
<tr>
<th>Average annual occupancy rate:</th>
<th>80%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seasonality:</td>
<td>High season months: July and August</td>
</tr>
<tr>
<td></td>
<td>Low season months: January</td>
</tr>
<tr>
<td>Market segmentation:</td>
<td>1. 98%, 2%</td>
</tr>
<tr>
<td>1. Individual guests and group tours participation rate</td>
<td>2. 10%, 90%</td>
</tr>
<tr>
<td>2. Foreign and domestic tourists participation rate</td>
<td>3. 100% (leisure tourists)</td>
</tr>
<tr>
<td>3. Business and leisure tourists (participation rate)</td>
<td></td>
</tr>
</tbody>
</table>
## APPENDIX – INVENTORY OF FACILITIES

### FACILITY: VILLA “AKADEMIK”, Zlatibor

<table>
<thead>
<tr>
<th>FACILITY:</th>
<th>VILLA “AKADEMIK”, Zlatibor</th>
</tr>
</thead>
</table>

Zlatibor mountain, Čajetina municipality. The address: Villa Akademik, 1 Vijogorska Street, Obudojevica settlement, Zlatibor 31315 (nearby Obudojevica ski center), www.akademik.rs

<table>
<thead>
<tr>
<th>The year of construction:</th>
<th>2008</th>
</tr>
</thead>
</table>

### CAPACITY TO PROVIDE SPA AND WELLNESS SERVICES

<table>
<thead>
<tr>
<th>Key spa and wellness services and programmes available:</th>
<th>Mini gym, Finnish sauna, massages.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilities and equipment:</td>
<td>Mini gym: aerobic and cardio fitness machines.</td>
</tr>
</tbody>
</table>

### CAPACITIES AND FACILITIES

<table>
<thead>
<tr>
<th>Number and structure of rooms:</th>
<th>5 lux apartments (3 triple bedroom and 2 double bedroom) and one double room.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of bars and capacity:</td>
<td>Bar for guests.</td>
</tr>
<tr>
<td>Other facilities:</td>
<td>Plasma TV, internet and satellite TV channels, hydro-massage shower cabins, Jacuzzi bath tub, table tennis.</td>
</tr>
</tbody>
</table>
**Facility:** VILLA “BAROVIĆ”, Zlatibor

Located nearby centre and lake, 650m away, surrounded by the mountain setting. Placed far enough to be out of the Zlatibor rush and yet tucked away for peace and quiet. Villa is located in the vicinity of the Maxi supermarket.

The address: Villa Barovic, Palisad settlement, Zlatibor 31315. www.vilabaroviczlatibor.com

<table>
<thead>
<tr>
<th>The year of construction:</th>
<th>2011</th>
</tr>
</thead>
</table>

**CAPACITY TO PROVIDE SPA AND WELLNESS SERVICES**

<table>
<thead>
<tr>
<th>Key spa and wellness services and programmes available:</th>
<th>Jacuzzi tub, sauna, steam bathroom, massages (relax, total body and partial, anti-cellulite, reflexology, lymph drainage, sports massages)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilities and equipment:</td>
<td>12 x 6 metres swimming pool with opening glass roof.</td>
</tr>
</tbody>
</table>

**CAPACITIES AND FACILITIES**

<table>
<thead>
<tr>
<th>Number and structure of rooms:</th>
<th>6 x 1/4; 2 x 1/5; 6 x 1/6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of restaurants and capacity:</td>
<td>No restaurant.</td>
</tr>
<tr>
<td>Number of bars and capacity:</td>
<td>One caffe bar, maximum capacity is 40 places.</td>
</tr>
<tr>
<td>Other facilities:</td>
<td>Swimming pool and spa center.</td>
</tr>
</tbody>
</table>

**KEY PERFORMANCE INDICATORS (2012):**

<table>
<thead>
<tr>
<th>Average annual occupancy rate:</th>
<th>57%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generated revenue:</td>
<td>About RSD 10,000,000</td>
</tr>
<tr>
<td>Revenue structure:</td>
<td>Accommodation (rooms) - 80% of revenues</td>
</tr>
<tr>
<td></td>
<td>Caffe bar - 10%, SPA - 10%</td>
</tr>
<tr>
<td>Seasonality: High season months and low season months</td>
<td>High season months: July, August and September</td>
</tr>
<tr>
<td></td>
<td>Low season months: December, March and October</td>
</tr>
<tr>
<td>Market segmentation:</td>
<td>1. Individual guests 80%; groups 20%</td>
</tr>
<tr>
<td></td>
<td>2. Foreign tourists 40%; domestic tourists 60%</td>
</tr>
<tr>
<td></td>
<td>3. Business tourists 30%; leisure tourists 70%</td>
</tr>
</tbody>
</table>
Located in Kaludjerske bare at Tara mountain. 600 metres away from Omorika hotel. Villa is in a location within easy reach of: Tara Mt, Zlatibor Mt, Mokra Gora, Zaovine lake, Mitrovac, lake Perucac and the Drina River Canyon.

The address: Vila Tara Lux, Kaludjerske Bare Street, Bajina Bašta 31250, www.tara-planina.com/Vila-TARA-lux.htm

| The year of construction: | 1998 |

### CAPACITY TO PROVIDE SPA AND WELLNESS SERVICES

| Key spa and wellness services and programmes available: | Sauna, total body and partial massages. |
| Facilities and equipment: | Mini gym, table tennis, sauna, massages. |

### CAPACITIES AND FACILITIES

| Number and structure of rooms: | Number of rooms - 16; Structure - 1/2, 1/3, 1/4, 1/5 |
| Number of restaurants and capacity: | 1 restaurant - 60 seats; inn - 25 seats. |
| Number of bars and capacity: | 1 bar - 25 seats. |

- **Other facilities:** 1 restaurant, “Yugoslavia” inn and sauna. Nearby the “Tara lux” villa is the sledding slope, ethno village, stables, Crnješkovo viewpoint, church and monastic cells, Hajdučka fountain, Jezerce and Jarevac dam. There is a summer house in the back yard and a playground for children.

### KEY PERFORMANCE INDICATORS (2012):

| Average annual occupancy rate: | 70% |
| Seasonality: (high season months and low season months) | High season months: January, May, July and August
Low season months: November, December and March |
| Market segmentation: | Individual tourists - 60%; Group tours - 40%;
Foreign tourists - 15%; Domestic tourists - 85%;
Business tourists - 5%; Leisure tourists - 95% |
Rehabilitation Center situated in Pribojska Banja is under remodeling, and there are significant investments in Wellness center.

The address: Pribojska Banja, Pribojska Banja Street, Pribojska Banja 31330

### General Characteristics

<table>
<thead>
<tr>
<th>Surface area:</th>
<th>RH Center - 1600m2, Wellness Center Pribojska Banja - 4.697m2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability (road network):</td>
<td>Pribojska Banja is located at a tri-junction of Serbia, Montenegro and the Republic of Srpska and bordered with the municipalities of: Čajetina, Nova Varoš, Prijeponje, Pljevlja, Čajniče and Rudo. Situated 4km away from the Belgrade-Bar railway, at the 10th kilometer of the E-75 Belgrade-Užice-Podgorica highway.</td>
</tr>
<tr>
<td>Existing infrastructure:</td>
<td>RH Center – 1,600 m2, Wellness Center Pribojska Banja- 4,697 m2</td>
</tr>
<tr>
<td>Spatial plans and development documents (including local economic development strategy/tourism strategies, master plans etc.):</td>
<td>Development plan documents are being prepared.</td>
</tr>
<tr>
<td>Property (public/private):</td>
<td>Diocese of Mileševo.</td>
</tr>
</tbody>
</table>

### Existing Natural Resources:

- **Thermo-mineral springs**: Special features that make this Banja so unique are - the temperature of an old spring water is 37.5°C, Ph 7.2. Water belongs to category of oligomineral, alkaline, homeotherm sulphur waters and has no taste or flavoursmell.

- **Healing-water springs**: The temperature of the old spring water is 37.5°C, Ph 7.2. Water belongs to category of oligomineral, alkaline, homeotherm sulphur waters, without taste or smell. Temperature of the new spring water is 35.7°C, Ph 7.6 and water belongs to category of oligomineral, alkaline, homeotherm and hydrocarbonate waters.

- **Altitude and climate**: Pribojska Banja climate ranges from moderate to subalpine. Slightly cool, pleasant summers with average temperature of 18.9°C, while average winter temperature is -0.6°C. Average rainfall 775mm, maximum precipitation in June was 84mm and minimum in March was 46mm.

- **Other natural local factors**: Besides thermal springs, Pribojska Banja has deciduous and coniferous forests and herbs, that is why it is called an air spa.
### POTENTIAL LOCATIONS FOR THE DEVELOPMENT OF HEALTH/SPA AND WELLNES TOURISM:

**ROŠKA BANJA, Požega**

Roška Banja is located in Roge village, in southwestern part of the municipality of Požega and it is bordered with the City of Užice. 14km away from Požega. Hilly area with lot of rises and valleys. Through the village, nearby Roška Banja spring, flows the River Rzav and the artificial accumulation of 55ha is being built.

### GENERAL CHARACTERISTICS

<table>
<thead>
<tr>
<th>Surface area:</th>
<th>1647 ha</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability (road network):</td>
<td>The road network in Roge territory consist of: Municipal road 1: Požega-Rupeljevo-Roge-Svračkovo-Arilje, L3 Rasna-Rupeljevo-Svračkovo which is the connection between Roge, Požega and Arilje. There is also 3120m long network of local uncategorized roads.</td>
</tr>
<tr>
<td>Existing infrastructure:</td>
<td>Water supply system is built in area of Roge settlement and connected to the main drinking water pipeline Arilje-Požega. There is also a telephone network. It has no hotel, only 9 rural households provide accommodation services. Locals claim that banja was established during the Otoman empire and between 1950 and 1980, banja was providing accommodation services in Local municipality facilities and in Požega`s recreational center.</td>
</tr>
<tr>
<td>Spatial plans and development documents (including local economic development strategy/tourism strategies, master plans etc.):</td>
<td>Spatial plan of Požega municipality foresee Roge as an tourist area. Tourism Development Programme of Roška Banja is created. The City Assembly voted to design Detailed Regulation Plan of Roge.</td>
</tr>
<tr>
<td>Property (public/private):</td>
<td>98% is private property and only 2% public property.</td>
</tr>
</tbody>
</table>

### EXISTING NATURAL RESOURCES:

<table>
<thead>
<tr>
<th>Thermo-mineral springs: (composition, temperature, flow rate, etc.)</th>
<th>There is a natural spring of thermo-mineral water which has proven medicinal characteristics. Spring yields about 20 l/s and temperature is 27°C.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healing-water springs (composition, temperature, flow rate, etc.)</td>
<td>Mineral water in Roge Banja belongs to category of: calcium, magnesium, hydro-carbonate, oligominal, low-sulphide hypotherms. Water is used for medicinal purposes: rheumatism, spondylosis, eye problems and nervous system disorders.</td>
</tr>
<tr>
<td>Altitude and climate: (the highest and the lowest average annual temperature, altitude, average annual precipitation, insolation, etc.)</td>
<td>Average annual temperature is 9.3°C. January is the coldest month with an average temperature of -2°C. Altitude is 530 m. Total annual precipitation is between 850 and 900 mm. Annual sunshine is about 1,737 hours and the longest insolation is 250 hours in July.</td>
</tr>
<tr>
<td>Other natural local factors: (mud, medical gas, herbs, etc.)</td>
<td>There are significant mushrooms and herbs species and 37 types of mushrooms can be found in Roge. Herbs: lungwort, St. John’s wort, thyme, milfoil. One of the cleanest rivers in Europe, the river Rzav, flows through Roge (brown trout habitat).</td>
</tr>
</tbody>
</table>
**POTENTIAL LOCATIONS FOR THE DEVELOPMENT OF HEALTH/SPA AND WELLNES TOURISM:**

VAPA BANJA, Čajetina

Nearby Rožanstvo, on the bank of Prištevica river. Territory of the Local Community of Rožanstvo, the Municipality of Čajetina

<table>
<thead>
<tr>
<th>GENERAL CHARACTERISTICS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Surface area:</strong></td>
</tr>
<tr>
<td><strong>Availability (road network):</strong></td>
</tr>
<tr>
<td><strong>Existing infrastructure:</strong></td>
</tr>
<tr>
<td><strong>Spatial plans and development documents (including local economic development strategy/tourism strategies, master plans etc.):</strong></td>
</tr>
<tr>
<td><strong>Property (public/private):</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EXISTING NATURAL RESOURCES:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Thermo-mineral springs:</strong> (composition, temperature, flow rate, etc.)</td>
</tr>
<tr>
<td><strong>Healing-water springs:</strong> (composition, temperature, flow rate, etc.)</td>
</tr>
<tr>
<td><strong>Altitude and climate:</strong> (the highest and the lowest average annual temperature, altitude, average annual precipitation, insolation, etc.)</td>
</tr>
</tbody>
</table>
### POTENCIJALNA LOKACIJA ZA RAZVOJ ZDRAVSTVENOG/SPA I VELNES TURIZMA:

<table>
<thead>
<tr>
<th>STAPARSKA I BIOŠTANSKA BANJA, UŽICE</th>
</tr>
</thead>
</table>

Staparska i Biostanska Banja are located in villages Stapari i Bioska, City of Užice

<table>
<thead>
<tr>
<th>Availability (road network):</th>
<th>Railway Beograd-Bar and local unpaved road.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing infrastructure:</td>
<td>Does not exist.</td>
</tr>
<tr>
<td>Spatial plans and development documents (including local economic development strategy/tourism strategies, master plans etc.):</td>
<td>Spatial Plan of the City of Užice, Local Environmental Action Plan, Study on protection of the “Djetinja Canyon” - the Area of Great Importance (in the process of completing)</td>
</tr>
<tr>
<td>Property (public/private):</td>
<td>WMC “Srbijavode”, City of Užice</td>
</tr>
</tbody>
</table>

### EXISTING NATURAL RESOURCES:

<table>
<thead>
<tr>
<th>Thermo-mineral springs: (composition, temperature, flow rate, etc.)</th>
<th>Staparska Banja: low-sulphur, indifferent, hypotherm, with the temperature of 30.5°C. Bioštanska Banja: low-sulphur, homeotherm, with the temperature of 36.4°C.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healing-water springs (composition, temperature, flow rate, etc.)</td>
<td>Spring is not categorized and balneological researches have not been conducted.</td>
</tr>
<tr>
<td>Altitude and climate: (the highest and the lowest average annual temperature, altitude, average annual precipitation, insolation, etc.)</td>
<td>Staparski Plateau is created by abrasion at an altitude of 850 m. There is no weather station in Staparska Banja. Data relating to City of Užice: average annual air temperature in Užice is 9.9°C; the coldest month is January with an average temperature of -1.4°C and the warmest month is July with 19.5°C. The highest rainfall accumulated in June has been 94mm and the minimum average rainfall usually falls in February and September – 55 mm. The average precipitation is 772 mm.</td>
</tr>
</tbody>
</table>
POTENTIAL LOCATIONS FOR THE DEVELOPMENT OF HEALTH/SPA AND WELLNESS TOURISM

ČEDOVSKA BANJA, Sjenica

4km north of Sjenica, in Čedovo Village, in the valley of the River Vapa, there is a group of thermal springs. Banja and Banjica springs are known by locals.

**GENERAL CHARACTERISTICS**

<table>
<thead>
<tr>
<th>Surface area:</th>
<th>300 m²</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability (road network):</td>
<td>R-117-A,M-8, (interstate and regional roads)</td>
</tr>
<tr>
<td>Existing infrastructure:</td>
<td>Does not exist.</td>
</tr>
<tr>
<td>Spatial plans and development documents (including local economic development strategy/tourism strategies, master plans etc.):</td>
<td>Does not exist.</td>
</tr>
<tr>
<td>Property (public/private):</td>
<td>Public.</td>
</tr>
</tbody>
</table>

**EXISTING NATURAL RESOURCES:**

<table>
<thead>
<tr>
<th>Thermo-mineral springs:</th>
<th>It is a karst spring, enriched with sand particles and gas bubbles. Water temperature is 26°C and spring does not freeze in winter. Springs are not exploited. Maximum water flow is 22 litres per second.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healing-water springs</td>
<td>Water is not tested, but it is necessary to examine it because patients with rheumatic diseases claim to feel significant health improvement after using this water.</td>
</tr>
<tr>
<td>Altitude and climate:</td>
<td>1050 MAMSL</td>
</tr>
<tr>
<td>Other natural local factors:</td>
<td>Thyme, Milfoil, St. John’s wort, Mint, Chamomile, Coltsfoot, Osier, Mountain Germander, Wormwood.</td>
</tr>
</tbody>
</table>
Mineral water spring is situated at Marina Reka village, in the Kušićan settlement. The mineral spring in Marina Reka differs from the one in Prilike because it is located within the Ivanjica town itself. Water is of high quality and possesses some health properties.

### GENERAL CHARACTERISTICS

| **Surface area:** | About 30 m². |
| **Availability (road network):** | 100 metres away from the regional road Ivanjica-Guča and 2 km from the centre of Ivanjica. |
| **Existing infrastructure:** | Small renovated mineral water spring and has building covering. |
| **Spatial plans and development documents (including local economic development strategy/tourism strategies, master plans etc.):** | There is no documentation. |
| **Property (public/private):** | Public. |

### EXISTING NATURAL RESOURCES:

| **Thermo-mineral springs: (composition, temperature, flow rate, etc.)** | Mineral carbonated water. |
| **Altitude and climate: (the highest and the lowest average annual temperature, altitude, average annual precipitation, insolation, etc.)** | About 460 MASV. |
### POTENTIAL LOCATIONS FOR THE DEVELOPMENT OF HEALTH/SPA AND WELLNESS TOURISM:

**THERMO-MINERAL WATER SPRING “SKAKAVCI”, Kosjerić**

### GENERAL CHARACTERISTICS

**Surface area:**
Spring (water borehole) of thermo-mineral water “Skakavci” is located on the south side of Maljen mountain, in Skakavci village, belongs to territory of the municipality of Kosjerić. This area is 200km away from Belgrade, a capital city of the Republic of Serbia, towards the southwest. Hydrogeological researches in Mionica river basin, covers a surface area of about 12km² of Skakavci village.

**Availability (road network):**
Category 1 municipal road Brod-Brezik-Skakavci

**Existing infrastructure:**
At the site is thermo-mineral water spring “Skakavci”. Besides two water intake facilities, there is neither supporting infrastructure nor approach village road, while telecommunications and energetic infrastructure is underdeveloped.

**Spatial plans and development documents (including local economic development strategy/tourism strategies, master plans etc.):**
Thermo-mineral spring (well) is one of the strategic directions for Kosjerić municipality development (Economic Development Strategy of the Kosjerić municipality 2010-2014, page 10. The City Assembly of Kosjerić in March 2010)
Spatial plan of the municipality of Kosjerić (“The official gazette of the municipality of Kosjerić” no.7/11, 6 October 2011)

**Property (public/private):**
Private.

### EXISTING NATURAL RESOURCES:

**Thermo-mineral springs: (composition, temperature, flow rate, etc.)**
In the area of Skakavci village, the first excavation BS-1 that has maximum depth of 800m was created in 1988-1989. Water of 33°C is drawn by a pump capacity of 16 l/s. Based on the physiological and chemical researches, water in the deepest well has a high Ph (high alkaline water, pH=11-12), which makes it very important and attractive to be used for balneotherapy. The surface water temperature is 44°C, which creates the possibility of using the geothermal energy (hot-water heating systems in Banja, spa and wellness centers). Chemical characteristics of mineral water: thermal, hydroxyl-sodium, high alkaline mineral water suitable for balneotherapy uses (skin disorders, internal use), as a “unique” healing thermal water.

**Healing-water springs (composition, temperature, flow rate, etc.)**
There are 2 well of different characteristics. Another excavation is a draw well BS-2/04 built in 2003 which has the capacity of 0.3 l/s (pump capacity 1.1 l/s) and temperature of 14°C. Chemical characteristics of water: cold, hydrocarbonate, magnesium, with a low mineral content and high pH=9.8, suitable for bottling.

**Altitude and climate: (the highest and the lowest average annual temperature, altitude, average annual precipitation, insolation, etc.)**
Village Skakavci is an area with the moderate climate which is characterized by warm summers, cool winters and distinct seasons. Average annual temperature is about 11°C, average precipitation is 769mm and average relative humidity is 75%.

**Other natural local factors: (mud, medical gas, herbs, etc.)**
Unknown.
APPENDIX – INVENTORY OF FACILITIES

**THERMOCARST SPRING VISOČKA BANJA, Arilje**

Visočka Banja is situated in Visoka village, territory of the municipality of Arilje. Village Visoka is bordered with Čajetina municipality and Banja is located in an altitude of 600m. Healing water springs next to the riverbed and Banja is located in the river Rzav canyon. Warm mineral water has a temperature of 28°C and belongs to category of potassium, magnesium, hydro-carbonate, oligomineral, hypothermal waters. There are two improvised masonry tubs.

### GENERAL CHARACTERISTICS

<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surface area</td>
<td>About 150 m²</td>
</tr>
<tr>
<td>Availability (road network)</td>
<td>Visočka Banja is 40km away from the centre of Arilje. The asphalt paved road leads to the Veliki Rzav riverbed.</td>
</tr>
<tr>
<td>Existing infrastructure</td>
<td>The only building that are used for tourism purposes are weekend houses in Banja and in surrounding area where tourist are looking for accommodation (just 2 of them are categorized) and one restaurant nearby Banja and the river Rzav, which provides food and beverage services (seasonal work from April to October). Facilities have 5 double rooms (categorized by the Expert Committee). Capacity of the restaurant is 40 seats.</td>
</tr>
<tr>
<td>Spatial plans and development documents (including local economic development strategy/tourism strategies, master plans etc.)</td>
<td>Special Purpose Area Plan for Rzav Basin (adopted by the Republic of Serbia), Spatial Plan of Arilje Municipality (adopted in 2011) and The Tourism Development Plan of the municipality of Arilje 2011-2016</td>
</tr>
<tr>
<td>Property (public/private)</td>
<td>Banja is situated in the riverbed - property of WMC &quot;Srbijavode&quot;. Land lots at the entrance to the Banja are privately owned.</td>
</tr>
</tbody>
</table>

### EXISTING NATURAL RESOURCES:

<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thermo-mineral springs (composition, temperature, flow rate, etc.)</td>
<td>Visočka Banja has a water temperature of 28°C and belongs to category of: magnesium, hydrocarbonate, oligomineral, hypothermal waters and there are several springs along the riverbed.</td>
</tr>
<tr>
<td>Healing-water springs (composition, temperature, flow rate, etc.)</td>
<td>Water belongs to category of potassium, magnesium, hydrocarbonate, oligomineral, hypothermal waters</td>
</tr>
<tr>
<td>Altitude and climate (the highest and the lowest average annual temperature, altitude, average annual precipitation, insolation, etc.)</td>
<td>Climate of Arilje municipality can be divided into two microclimate types: sub-mountain (sub-alpine climate is typical for mountain area) – with cool summers, severe chilly winters and the autumn is warmer than spring and moderate climate (typical for highlands and valleys) – with mild summers, cool winters and transitional seasons marked by mild temperatures (Visočka Banja belongs to this climate type). Average annual temperature is 9.5°C, the coldest month is January with the average temperature of -2.5°C, while the warmest is July with 20°C aat. Total number of sunny hours is 1400-1700 per year. Average summer sunshine varies from 180 to 210 hours i.e. 6-7 sunny hours per day.</td>
</tr>
<tr>
<td>Other natural local factors (mud, medical gas, herbs, etc.)</td>
<td>Due to fact that Visoka village lies in its unspoiled nature with a few active households, herbs can be found around the Banja and in village area. Forests are a rich source of edible mushrooms (boletus, morel, chanterelle, peppery milk-cap), ground flora (fern, sage, strawberry, nettle) and bushy plants (hazel bush, cornel trees, hawthorn, sweetbrier, elder, wild blackberries, etc.)</td>
</tr>
<tr>
<td>Note:</td>
<td>There are no medical purpose built facilities near the healing water. Private plots with private facilities are located at the entrance to Banja, of which one (about 100m²) can be suitable for renovation for medical purposes. Most tourists (from the region and beyond) come during the summer months - June, July, August.</td>
</tr>
</tbody>
</table>
### Potential Locations for the Development of Health/Spa and Wellness Tourism:

**TOMETINO POLJE VILLAGE, Požega**

**Tometino Polje village** is situated 35km from Požega. Tometino polje is located in the north part of the municipality of Požega in Zlatiborski District and bordered by the municipalities of Kosjerić, Valjevo, Mionica and Gornji Milanovac. Tometino Polje is the mountain village at the foot of the Maljen mountain, nearby Divčibare (6km) and has two rivers, Crna Kamenica and Bela Kamenica. The highest peak of Maljen, “King’s Table” at an altitude of 1108m, belongs to Tometino Polje. An average altitude is about 800m. The landscape is intersected with deciduous and coniferous forests and large pastures.

### General Characteristics:

<table>
<thead>
<tr>
<th>Surface area:</th>
<th>5 303 ha.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability (road network):</td>
<td>Village has good public transportation links. 6km away from Divčibare mountain, 35km away from Pozega and 110km from Belgrade via Lajkovac, Mionica and Divčibare.</td>
</tr>
<tr>
<td>Existing infrastructure:</td>
<td>Regional road Divčibare-Valjevo passing through the village and there is also a local road network. The village has about 150 households and over 200 holiday houses.</td>
</tr>
<tr>
<td>Spatial plans and development documents (including local economic development strategy/tourism strategies, master plans etc.):</td>
<td>Spatial plan of Požega municipality. Detailed regulation plan of the area Tometino Polje (this plan includes construction of Tometino polje as an amusement zone for the guest who visit Divčibare: few artificial accumulation, ski-lift from Tometino Polje to Divčibare, golf courses, helipad, exclusive accommodation, horse-riding school, etc.).</td>
</tr>
<tr>
<td>Property (public/private):</td>
<td>Mostly private property.</td>
</tr>
</tbody>
</table>

### Existing Natural Resources:

| Thermo-mineral springs: (composition, temperature, flow rate, etc.) | There are no springs of thermo-mineral water, but mountain river Kamenica, a tributary of the Zapadna Morava river where the locals bathe, flows through the village. |
| Healing-water springs (composition, temperature, flow rate, etc.) | As a result of favorable geographical position, effects of the Mediterranean climate in combination with Carpathian and Pannonian climate, are felt in Tometino Polje and Divčibare, which can explain the presence of iodine in the air. |
| Altitude and climate: (the highest and the lowest average annual temperature, altitude, average annual precipitation, insolation, etc.) | Altitude is 650m. Climate characteristics: very warm summers, snowy winters and mild spring and autumn. Average summer temperature does not exceed 22°C and winters of abundant snow last 4 months. Annual percentage of cloudiness is 55% suggests that insolation is good. |
| Other natural local factors: (mud, medical gas, herbs, etc.) | Clear mountain river Kamenica, abundance of medicinal plants and 2 nature reserves: Velika Pleć, where is Vražji Vir waterfall located, and nature reserve Čalački Potok. |
### Potential Locations for the Development of Health/Spa and Wellness Tourism:

#### Spring on the Right Bank of Katušnica River (Gostilje), Čajetina

Water spring is located on the right bank of Katušnica river (Gostilje), in territory of Local Community Ljubiš, Čajetina municipality.

### General Characteristics:

- **Surface area:** Parcel identification number (PIN): M/I-76; Coordinates: 7406.077, 4837.307
- **Availability (road network):** Local road.
- **Spatial plans and development documents (including local economic development strategy/tourism strategies, master plans etc.):** Master plan of Zlatibor-Zlatar tourist destination
  "Evaluation of the Groundwater Resources and researches for multi-purpose use in Čajetina municipality"
- **Property (public/private):** Unknown.

### Existing Natural Resources:

- **Thermo-mineral springs: (composition, temperature, flow rate, etc.)**
  Spring is not tapped and water forms a stream flows into Katušnica river. Spring discharge water at a rate of 0.2 l/s. Water temperature is 17.6°C at the air temperature of 14.8°C. Water is clear with no color, smell or taste. This water belongs to category of low-mineral content waters (312 mg/l), hydrocarbonate (332 mg/l), calcium (98.2 mg/l) with the 7.45 pH and total hardness of 14.84°dH.

- **Altitude and climate: (the highest and the lowest average annual temperature, altitude, average annual precipitation, insolation, etc.)**
  732 MAMSL.
### POTENTIAL LOCATIONS FOR THE DEVELOPMENT OF HEALTH/SPA AND WELLNES TOURISM:

#### “ST. JOHN THE BAPTIST” SPRING (BELA VODA), Mokra Gora

Road to spring leads next to railway, which crosses an interstate highway Mokra Gora-Višegrad and turns left to the asphalt road in Glibetidi hamlet. Spring is located below the railway and asphalt road which leads to Jatarice, on the right bank of Kamišina river, downstream from the springwell.

#### EXISTING NATURAL RESOURCES:

**Thermo-mineral springs:**

<table>
<thead>
<tr>
<th>Property</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Composition:</td>
<td>Calcium, sodium, hydroxyl, chloride, high-alkaline, cold, oligomineral water.</td>
</tr>
<tr>
<td>Organoleptic properties:</td>
<td>Water is clear, without smell and has alkaline taste.</td>
</tr>
<tr>
<td>Physical and chemical properties:</td>
<td>Water temperature is 18°C, having total mineralization of 460.3 mg/l, dry residue at 180°C is 360 mg/l. Water belongs to category of high-alkaline water with 11.75 pH. Contains small amount of dissolved gases and oxygen saturation of 52%. Physiologically active microelements are present in small quantities and the concentrations of heavy metals and toxins are below the maximum allowable limits. Levels of radioactive elements are lower than the maximum permitted values.</td>
</tr>
</tbody>
</table>

#### “ČESME” SPRING, Mokra Gora

Spring is located on the left side of Kamišina riverbank, 60-70m uphill. It consists of two springs tumble down the steep rocks to the main spring “Česme”.

#### EXISTING NATURAL RESOURCES:

**Thermo-mineral springs:**

<table>
<thead>
<tr>
<th>Property</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Composition:</td>
<td>Magnesium, hydrocarbonate, cold, oligomineral water</td>
</tr>
<tr>
<td>Organoleptic properties:</td>
<td>Water is clear, with no smell and has pleasant taste.</td>
</tr>
<tr>
<td>Physical and chemical properties:</td>
<td>Water temperature is 12°C, total mineralization of 440 mg/l and dry residue at 180°C is 295 mg/l. Water is slightly alkaline, having a pH of 8.3. Physiologically active microelements are present in small quantities and the concentrations of heavy metals and toxins are below the maximum permitted values. Radioactive elements are naturally present.</td>
</tr>
</tbody>
</table>
### POTENTIAL LOCATIONS FOR THE DEVELOPMENT OF HEALTH/SPA AND WELLNESS TOURISM:

<table>
<thead>
<tr>
<th>“DULOVE VODE” SPRING, Mokra Gora</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spring is located in Kamišina riverbed, 1km upstream of a wellspring.</td>
</tr>
</tbody>
</table>

#### EXISTING NATURAL RESOURCES:

<table>
<thead>
<tr>
<th>Thermo-mineral springs: (composition, temperature, flow rate, etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Composition: calcium, hydroxyl, high-alkaline, cold, oligo-mineral water. Organoleptic properties: water is clear, without smell and has alkaline taste. Physical and chemical properties: water temperature is 18°C, total mineralization is 174 mg/l, and dry residue is 120 mg/l at 180°C. Water has high pH of 11.75 and belongs to the group of high-alkaline water. Contains small quantities of dissolved gasses and high level of oxygen saturation (72%). Physiologically active microelements are naturally present and the concentrations of heavy metals and toxins are below the maximum permitted values. Radioactive elements are lower than the maximum allowable limits.</td>
</tr>
</tbody>
</table>

### POTENTIAL LOCATIONS FOR THE DEVELOPMENT OF HEALTH/SPA AND WELLNESS TOURISM:

<table>
<thead>
<tr>
<th>„GLIŠOVA VODA” NATURAL MINERAL WATER SPRING, Kremna</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natural spring of boron-sulphide water located in Kremna, on the right side of the road to Mokra Gora, at a distance of 100 m.</td>
</tr>
</tbody>
</table>

#### EXISTING NATURAL RESOURCES:

<table>
<thead>
<tr>
<th>Thermo-mineral springs: (composition, temperature, flow rate, etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Composition: natrium, hydro-carbonate, boron, sulphide, mild-alkaline water. Organoleptic properties: water is clear, smells like rotten eggs, cold and has a sulphur taste. Physical and chemical properties: water temperature is 13°C, total mineralization is 2.600 mg/l and dry residue at 180°C is 2.010 mg/l. Water is mild alkaline and has pH of 9.25. Contains 1.4 mg/l of dissolved hydrogen-sulphide and thus belongs to category of sulphidic waters. There are no trace amounts of heavy metals and toxins and contains high levels of nitrite and cannot be used for drinking. Radioactive elements are naturally present.</td>
</tr>
</tbody>
</table>

### POTENTIAL LOCATIONS FOR THE DEVELOPMENT OF HEALTH/SPA AND WELLNESS TOURISM:

<table>
<thead>
<tr>
<th>„RADOVANOVA VODA“ SALTY MINERAL SPRING, Mokra Gora</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salty mineral water spring „Radovanove vode” is a draw well in the area of Kotroman, in Filipović’s meadow.</td>
</tr>
</tbody>
</table>

#### EXISTING NATURAL RESOURCES:

<table>
<thead>
<tr>
<th>Thermo-mineral springs: (composition, temperature, flow rate, etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Composition: natrium, chlorine, bromine, iodine, fluoride, cold mineral water. Organoleptic properties: water is clear, salty and with no smell. Physical and chemical properties: water temperature is 13°C, total mineralization is 6.140 mg/l and dry residue is 6.000 mg/l at 180°C. Water is soft alkaline with the pH of 8.2. Contains small quantities of dissolved gasses. Physiologically active microelements are present in small amounts and the concentrations of heavy metals and toxins are below the maximum allowable values. Radioactive elements are naturally present.</td>
</tr>
</tbody>
</table>
### 6.1.2 Facilities in Sarajevo Macro Region territory

<table>
<thead>
<tr>
<th>FACILITY:</th>
<th>„AQUAREUMAL“ APARTMENT COMPLEX, Fojnica</th>
</tr>
</thead>
<tbody>
<tr>
<td>The year of construction:</td>
<td>2005.</td>
</tr>
</tbody>
</table>

**CAPACITY TO PROVIDE SPA AND WELLNESS SERVICES**

- **Key spa and wellness services and programmes available:**
  - Programmes: wellness magic, healing touch, anti-stress magic, active vacation and health harmony;
  - Facilities: steam bathrooms, sauna, massage rooms, relax room.
  - Services: aromatherapy, facial massage, classic manual massage, sports massages, anti-cellulite

- **Facilities and equipment:** Outdoor swimming pools, whirlpool.

**CAPACITIES AND FACILITIES**

- **Number and structure of rooms:** 74 apartments with 202 French beds and 148 additional beds.
- **Number of restaurants and capacity:** „Terra“ restaurant - 100 seats, „Avlija“ ("The Yard") restaurant - 40 seats, „White“ restaurant - for 80 guests and Barbecue terrace - comfortably seats 60 guests.
- **Other facilities:** Park for children with toboggans, swings, seesaws, etc; multifunctional hall (seminars, conferences, educational events, presentations, meetings, etc.) with the capacity of 250 people.

**KEY PERFORMANCE INDICATORS (2012):**

- **Average annual occupancy rate:** 28%
- **Seasonality:**
  - High season months: from April to November
  - Low season months: January, February, March and December
- **Market segmentation:**
  1. Individual guests and group tours participation rate
  2. Foreign and domestic tourists participation rate
  3. Business and leisure tourists participation rate

  1. Individual guests - 50%, group tours - 50%
  2. Domestic tourists - 90%, foreign tourists - 10%
  3. Business tourists - 50%, leisure tourists - 50%
**APPENDIX – INVENTORY OF FACILITIES**

**FACILITY:** ILIDŽA BANJA, Gradačac

It is situated in a territory of Gradačac municipality, on the road Sarajevo-Tuzla-Gradačac, 169 km from Sarajevo and about 180 km from Belgrade.

**The year of construction:** 1980, renovated after the war.

## CAPACITY TO PROVIDE SPA AND WELLNESS SERVICES

**Key spa and wellness services and programmes available:**
- Hydrotherapies (mineral bath, pearl bath, underwater shower-massage, four cell bath, thermal pool, mineral water inhalation), thermotherapy (paraffin, hydrocollator, infrared, microwave diathermy), electrotherapy (diadynamic current, interferential current, electroplating bath, TENS - transcutaneous electrical nerve stimulation, electro-stimulation), ultrasound therapy, magnetic therapy, laser therapy, kinesiotherapy, recreational gymnastics, medical therapy...
- Therapeutic indications of spa therapy: rheumatic diseases (inflammatory, degenerative, extra-articular), neurological diseases (stroke, sciatica, nerve lesions), disorders, injuries and operative conditions of the locomotor apparatus, metabolic disorders (diabetes, gout), chronic gynecological symptoms.

**Facilities and equipment:** About 150 beds (32 double rooms, 32 triple rooms and 2 apartments).

## CAPACITIES AND FACILITIES

**Number and structure of rooms:** About 150 beds (32 double rooms, 32 triple rooms and 2 apartments).

**Number of restaurants and capacity:** One restaurant, maximum capacity is 380 seats

**Number of bars and capacity:** 1 bar

## KEY PERFORMANCE INDICATORS (2012):

**Average annual occupancy rate:** 76-81%

**Generated revenue:** KM 2.5 million

**Revenue structure:** 50% are health services revenues and the rest are food and beverage revenues.

**Seasonality:**
- **High season months:** August and September
- **Low season months:** February

**Market segmentation:**
1. Individual guests and group tours participation rate
2. Foreign and domestic tourists participation rate
3. Business and leisure tourists participation rate

**Note:** Ilidža spa is part of the Tuzla Canton, outside of the geographical coverage of the Project, and is included according to the instructions of project partners.
Health and tourism center Vrućica Banja is located in the centre part of the Republic of Srpska and Bosnia and Herzegovina, near the Teslić town. Surrounded by gentle hills, slopes of Borja mountain, covered with dense deciduous and coniferous forests and connected with the wide valley of Ušor river, 230 metres above the sea level. Moderate climate in combination with thermo-mineral water provide relaxing clean air, piece, quiet and health.

The year of construction: The first building in the complex was built in 1928 and hotel Kardial**** in 1976

CAPACITY TO PROVIDE SPA AND WELLNESS SERVICES

Key spa and wellness services and programmes available: World of Water, World of Saunas, World of Massages, Medical Wellness and Medical Beauty Spa.

Facilities and equipment: Fitness, recreational indoor pool, outdoor and indoor swimming pools with thermo-mineral water.

CAPACITIES AND FACILITIES

Number and structure of rooms: Kardial hotel ****, 196 bedrooms – 400 beds (1/1, 1/2, suites). Vrućica spa complex – 1000 beds.

Number of restaurants and capacity: Three restaurants (350 seats, 200 seats and 280 seats), multifunctional hall for dinners and parties – 800 seats and pizzeria with 70 indoor seats and 100 seats in the garden.

Number of bars and capacity: Three aperitif bars with 50-100 seats and the night bar can seat up to 100 guests.

Other facilities: Sports courts (indoor and outdoor).

KEY PERFORMANCE INDICATORS (2012):

Average annual occupancy rate: 162,000 overnight stays, 54%

Generated revenue: KM 10,113,624.99 in the first nine months of 2013

Revenue structure: (room, food, beverage, wellness revenue.) KM 2,092,082; KM 2,983,536; KM 554,233; KM 527,126

Seasonality: (high season months and low season months) High season months: July, August, September and OctoberLow season months: January and February

Market segmentation: 1. Individual guests and group tours participation rate 2. Foreign and domestic tourists participation rate 3. Business and leisure tourists participation rate 75% domestic tourists, 25% foreign tourists, 71% health programme, 29% other programmes

Note: Vrućica Banja is located outside of the geographical coverage of the Project, and is included according to the instructions of project partners
## 6.1.3 The list of hydrogeological phenomena in Western Serbia territory

*Note: The list of hydrogeological phenomena is provided by HIDROGEOEKO ENGINEERING, Belgrade, Republic of Serbia, 8 Valjevo Street (+381 11 32 45 395, +381 60 65 000 29)*

<table>
<thead>
<tr>
<th>Location</th>
<th>Temperature (°C)</th>
<th>Mineral Content (mg/l)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BAJINA BAŠTA</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manastir Rača – Lađevci</td>
<td>T = 17.5-20.5°C</td>
<td>M = 220 mg/l</td>
</tr>
<tr>
<td><strong>POŽEGA</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Požega</td>
<td>T = 14°C</td>
<td>M = 1190 mg/l</td>
</tr>
<tr>
<td>Roška banja-Roge</td>
<td>T = 23.5°C</td>
<td>M = 390 mg/l</td>
</tr>
<tr>
<td>G. Dobrinja</td>
<td>T = 25°C</td>
<td></td>
</tr>
<tr>
<td>Gorobilje</td>
<td>T = 12,2°C</td>
<td>M = 350 mg/l</td>
</tr>
<tr>
<td><strong>ČAJETINA</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pašića vrelo</td>
<td>T = 17°C</td>
<td></td>
</tr>
<tr>
<td>Rožanstvo</td>
<td>T = 20°C</td>
<td>M = 490 mg/l</td>
</tr>
<tr>
<td>Banja Vapa-Tošina banja</td>
<td>T = 16.6°C</td>
<td>M = 324 mg/l</td>
</tr>
<tr>
<td>Gostilje-Katušnica</td>
<td>T = 16.4°C</td>
<td>M = 312 mg/l</td>
</tr>
<tr>
<td>Gostiljsko vrelo</td>
<td>T = 9.2°C</td>
<td>M = 312 mg/l</td>
</tr>
<tr>
<td>Bela voda- Jablanica</td>
<td>T = 14.7°C</td>
<td></td>
</tr>
<tr>
<td>Ljubiško vrelo</td>
<td>T = 8.6°C</td>
<td>M = 370 mg/l</td>
</tr>
<tr>
<td>Sušičko vrelo</td>
<td>T = 10.5°C</td>
<td>M = 320 mg/l</td>
</tr>
<tr>
<td><strong>KOSJERIĆ</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Banjci</td>
<td>T = 25°C</td>
<td>M = 350 mg/l</td>
</tr>
<tr>
<td><strong>UŽICE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bioštanska banja</td>
<td>T = 37,1°C</td>
<td>M = 280 mg/l</td>
</tr>
<tr>
<td>Kotroman</td>
<td>T = 13°C</td>
<td>M = 7970 mg/l</td>
</tr>
<tr>
<td>Kremna</td>
<td>T = 8°C</td>
<td>M = 1990 mg/l</td>
</tr>
<tr>
<td>Stapari</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>ARILJE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ariljska Cerova</td>
<td>T = 10°C</td>
<td>M = 280 mg/l</td>
</tr>
<tr>
<td>Visoka-Visočka banja</td>
<td>T = 25°C</td>
<td>M = 350 mg/l</td>
</tr>
<tr>
<td>Banja Klisura</td>
<td></td>
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</tr>
</tbody>
</table>
### APPENDIX – INVENTORY OF FACILITIES

#### IVANJICA

<table>
<thead>
<tr>
<th>Location</th>
<th>Temperature</th>
<th>Mineral Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prilički kiseljak</td>
<td>T = 12°C</td>
<td>M = 2790 mg/l</td>
</tr>
<tr>
<td>Ivanjički kiseljak-Ivanjica</td>
<td>T = 10°C</td>
<td>M = 3660 mg/l</td>
</tr>
<tr>
<td>Sveštica</td>
<td>T = 15°C</td>
<td>M = 3100 mg/l</td>
</tr>
<tr>
<td>Bukovica</td>
<td>T = 12°C</td>
<td>M = 2280 mg/l</td>
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</tbody>
</table>

#### NOVA VAROŠ

<table>
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<tr>
<th>Location</th>
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<th>Mineral Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crno vrelo</td>
<td>T = 17-22.2°C</td>
<td>M = 330 mg/l</td>
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</table>

#### SJENICA

<table>
<thead>
<tr>
<th>Location</th>
<th>Temperature</th>
<th>Mineral Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Čedovo</td>
<td>T = 20-26.3°C</td>
<td>M = 310 mg/l</td>
</tr>
<tr>
<td>Sjeničko vrelo</td>
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<td></td>
</tr>
</tbody>
</table>

#### PRIBOJ

<table>
<thead>
<tr>
<th>Location</th>
<th>Temperature</th>
<th>Mineral Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pribojska banja</td>
<td>T = 36.5°C</td>
<td>M = 420 mg/l</td>
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</tbody>
</table>

#### PRIJEPOLJE

<table>
<thead>
<tr>
<th>Location</th>
<th>Temperature</th>
<th>Mineral Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Krajčinovići</td>
<td>T = 15°C</td>
<td>M = 1770 mg/l</td>
</tr>
</tbody>
</table>
6.1.4 The list of hydrogeological phenomena in territory of Sarajevo Macro Region

*Note: The list of hydrogeological phenomena is provided by HIDROGEOEKO ENGINEERING, Belgrade, Republic of Serbia, 8 Valjevo Street (+381 11 32 45 395, +381 60 65 000 29)*

1. Zenica - Doboj Canton  
   a) Olovo (Olovo spa)  
   b) Kakanj (Tičići)

2. Central Bosnia Canton  
   a) Fojnica  
   b) Kiseljak  
   c) Busovača (Busovački kiseljak, Orelički kiseljak, Katavin i Klokotski kiseljak)

3. Tuzla Canton  
   a) Tuzla (Slana Banja, Tuzlanski kiseljak)  
   b) Kladanj (rare occurrence of mineral waters)

4. Sarajevo Canton  
   a) Blažuj (significant quantities of mineral water)  
   b) Ilidža Banja  
   c) Jošanica-Vogošnica  
   d) Ilijaš (Srednje – two thermal springs)  
   e) Butmir

5. The Republic of Srpska  
   a) Sokolac (Lučica Banja)  
   b) Višegrad (Vilina Vlas Banja, Višegradskas Banja)  
   c) Srebrenica

*Note: Prospective areas for researches of mineral, thermal and thermo-mineral waters are Sarajevo Field, along the river Željeznica, wide area of Buhotina settlement near Kobiljače and Podlipnik.*
6.1.5 Proposal of hydrogeological researches

Note: The list of hydrogeological phenomena is provided by HIDROGEOEKO ENGINEERING, Belgrade, Republic of Serbia, 8 Valjevo Street (+381 11 32 45 395, +381 60 65 000 29)

- Creation of the detailed hydrogeological research project which will precisely define the estimation of necessary works. The estimation should include:
  1. Collecting, analysis and reinterpretation of previous geological, hydrogeological, hydrological and geophysical researches that could be relevant for further researching and solving problems in the research area.
  2. Structural-geological researches
     - Creation of the geological plan of specific scale which refers to precise research area in which will be executed the further detailing the geological units and structural elements to levels that require detailed hydrogeological investigations.
     - Correlation between geological and hydrogeological results and the identification of potential hydrogeological areas.
  3. Geophysical researches
     - Geophysical examination of the selected area (with the required number of profiles of specific length), using the method of measuring the acceleration of gravity, then the total intensity vector ZMP and testing ground probe directly measuring the geophysical quantities at the field.
     - Based on the half detailed geophysical examinations of perspective areas, one area will be chosen for detailed researches using the methods of geoelectrical probing and geoelectrical mapping.
  4. Hydrogeological researches
     - Creation of hydrogeological plan of the specific scale in the zone of thermal water intake facilities with the potential location for the new water intake facilities.
     - Defining the hydrodynamic relations between the existing thermal water intake facilities, draw-wells testing.
     - Monitoring the elements of thermal water regimes in the existing water intake facilities during the one hydrologic cycle (temperature, pressure, yield, chemical and gas composition)
     - Measurement of pressure, yield and temperature should be performed every 5 days, while partial chemical analysis would be done once a month.
     - Installation of one rainfall station and two water level measuring stations (water meter) and establishing a measurement of precipitation, water level and rate of flow of a watercours (a discharge, if it exist), a total duration of 12 months.
     - Hydrochemical testing of thermal water quality that will include sampling, transport and conduct of ten partial and two complete chemical analysis.
- Creation of the Study on derived structural, geological, geophysical, hydrogeological, hydrochemical, radiological and microbiological researches with the suggested microlocations for investigative drilling planned within the main Project.
- Creation of the Study on groundwater reserves, which proves the quality and quantity of resources.
PREPORUKE ZA DALJI RAZVOJ