

1st

**International
Scientific
Conference**

2-4 June, 2016

Vrnjačka Banja, Serbia

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**TOURISM
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**UNIVERSITY OF KRAGUJEVAC
FACULTY OF HOTEL MANAGEMENT
AND TOURISM IN VRNJAČKA BANJA**



GLOBALIZATION AND CHANGING CONSUMER BEHAVIOR – CHALLENGES FOR POSITIONING TOURISM DESTINATIONS

Zoran Srzentić¹; Andriela Vitić-Četković²;

Abstract

At the beginning of the 21st century tourism is a dynamic industry that has an increasing share of global economic growth. Modern tourism is based on the trend of globalization, characterized by the growing interdependence of national economies in the global economy. Advances in technology and the new needs of consumers contribute to strengthening the global character of tourism, but also the growing interdependence of the global and the local. Balancing between the acceptance of global trends and the preservation of diversity of attractions is one of the essential tasks of destination marketing management nowadays. The current flows in the global tourism market suggest that new forms of tourism represent important potential for positioning and repositioning tourism destinations. Therefore, the focus of this paper is to analyze globalization in terms of contemporary requirements of tourism demand, as well as potentials of positioning destinations through special interest tourism. The results of research should give a proposal for destination marketing management of Montenegro and region, in the context of creating a differentiated tourism offer that adapts to the modern profile of consumers in tourism.

Keywords: *globalization, consumer behavior, special interest tourism*

Introduction

Globalization is the dominant socio-economic phenomenon of our time, which is developed on the basis of dynamic international exchange (particularly services) and progress in the domain of information and

1 Zoran Srzentić, Assistant Professor, PhD, Faculty of Hotel Management and Tourism, University of Kragujevac; Vojvodanska 5A, 36210 Vrnjačka Banja; Serbia; e-mail: mrzos.acrs@gmail.com

2 Andriela Vitić-Četković, Associate Professor, PhD, Faculty of Tourism and Hotel Management, University of Montenegro; Stari grad 320; 85330 Kotor; Crna Gora; e-mail: andriela@ac.me

communication technologies. In the scientific community of social sciences, dominates the opinion that globalization is one of the most important trends of the last century. The world under the influence of globalization is becoming a "global village", which means drastically reducing the time required for the movement of people, goods and information from one to the other end of the globe. The process of globalization has reached proportions of megatrends because of connecting traffic means of high capacity and speed (Čomić, 2000), and it has important repercussions in tourism.

Modern tourism, as one of the world's leading industry, has a distinctly global character. Travel is a basic component of the lifestyle in the consumer society. In accordance with the nature of globalization, there are new trends in the demand side of tourism market, which creates numerous requests for stakeholders in the tourism industry; both in terms of quality and competitiveness of the tourism products, as well as to its differentiation and positioning in accordance with global criteria.

The concept and development of globalization as a socio-economic phenomenon

Globalization is historically complex phenomenon, which carries a lot of controversy. On the one hand, globalization enhances productivity and utilization of economy of scale (Cvetkov-Čikošev & Vitić-Četković, 2015). On the other hand, it causes that economies around the world are facing with increasing competition that requires constant change and adaptation. Furthermore, globalization encourages the removal of administrative, financial and other barriers to international trade, be it on trade in goods, services, exchange of information or the movement of people. This process allows the expansion of the business horizon, but at the same time accelerates environmental destruction and creates challenges for the security of destinations.

Definitions of globalization vary, given the complexity and multidimensionality of the phenomenon, and many angles from which this phenomenon can be observed. Seen from the perspective of marketing, globalization is a contemporary tendency in the world market, which is essentially a generator of growth in trade of products and services, the increase in cross-border investment and movement of people. According to one opinion, globalization is: "relentless integration of markets, nation-states and technologies to an unprecedented level that

allows individuals, corporations and nation-states to extend influence around the world farther, faster, deeper and cheaper than ever before" (Friedman, 1999).

According to one opinion, globalization represents: "the integration of national economies, which leads to the concept of global or planetary economy without borders" (Avinash, 2000).

Third opinion states that it is: "a process that creates new conditions for the successful operation at an international level and in which specific industries and companies assume their growth and development only on a world scale" (Mandler & Goldsmith, 1996).

There are different opinions regarding the occurrence of this phenomenon. There are interpretations that globalization has its beginnings in the 11th century, when occurred the expansion of regional trade under the influence of the Venetian Republic, followed up by overseas trip and discoveries of Portuguese, Spanish and Dutch sailors, along with advances in the domain of marine technology (Kohler, 2003).

Generally, the beginning of this process refers to the second half of the 19th century, with the advent of electricity, railways and the introduction of the gold standard. Therefore, the period (1870 - 1914) is determined as period of the first wave of globalization (Lee & Carter, 2005), and its characteristics were: the development of transport and the increase in international flows of goods, capital and labor, especially from Europe to North America. After I and World War II, there was a need to establish stronger international cooperation, resulting in the formation of the International Monetary Fund and the World Bank. These events are considered the beginning of the second wave of globalization, which is linked to the period 1950-1980 (Lee & Carter, 2005).

The third wave of globalization began the 80s of the 20th century under the influence of the expansion of information and communication technologies. In this period, development of information - communication technologies for the first time provides a chance to less developed countries to use the opportunities that the global market may offer.

Overall, globalization is a complex phenomenon, which divided the academic community and society to the optimists and the pessimists; defenders of globalization and anti-globalists. Therefore, this trend brings

with it a range of ancillary economic activities, which have corresponding repercussions in certain industries that are heavily affected by the process of globalization, such as tourism.

Contemporary wave of globalization of markets

When we discuss the dynamics of globalization, it is mainly focused on: investments, the new role of the state, information and communication technologies, global industries (Table 1) and global consumers. First, the investments are not geographically limited, but they seek favorable conditions. In this sense, the new role of the state assumes a much weaker intervention related to investment flows. Second, many industries are more globally oriented than some decades ago. Third, information - communication technologies allow companies to do business in different parts of the world without creating a complete business system in each country where they operate and without training a lot of workforce. Furthermore, thanks to the availability of information, the individual consumer is becoming more globally oriented, takes a similar lifestyle and uses global products.

Table 1: *Expected trend of the globalization process till 2027.*
(According to the value of creation of world GDP in 000 billion dollars)

Industry/products	1997	2027
Globalized	6	73
On the way to globalization	18	13
Local	4	5
TOTAL:	28	91

Source: *Documentation of the project 1464, McKinsey QR, NY (according to: Jović M. (2003): Ključni faktori konkurentnosti i tranzicija, Ekonomist, Volume 1, Number 3, p. 120)*

Global consumer can be characterized as a consumer who has largely homogenous needs as consumers from many countries and which seeks to find homogeneous benefits in attributes of products and services of more countries. He was created thanks to the increased mobility of people, expansion of the service sector, education and the development of communication and transport technologies. System of information and communication, as well as travel and tourism contributed to the equalization of tastes and demands of that consumer, which created a convergence of cultures, vanishing aversion to changes and the reduction of national barriers. Although the globalization encircled a few industries

until 3-4 decades ago, it is now obvious that the world economy will recently become essentially global.

It is believed that about 2/3 of the world economy is still in the early stage of globalization process (Fraser & Oppenheim, 1999). In a world of reduced barriers, rules of international business will be significantly changed. In future, companies and destinations will have to be willing to be flexible with regard to the modalities of participation in the global market and related to successful positioning towards the agile competition.

On the other hand, occurrence of the so-called anti-globalization movement can be described as a challenge of globalization which casts a shadow of its positive effect, since it puts in the forefront the disparity between the rich and the poor, as well as environmental degradation under the influence of reduced regulation in many countries with the aim of attracting foreign capital.

The market opening offers new opportunities for the countries, destinations, companies and consumers in terms of access to more products and services, technologies and investments. Reducing transportation costs resulted in a faster and easier mobility of goods, services, people. Declining costs of communication also resulted in a better understanding of consumer behavior.

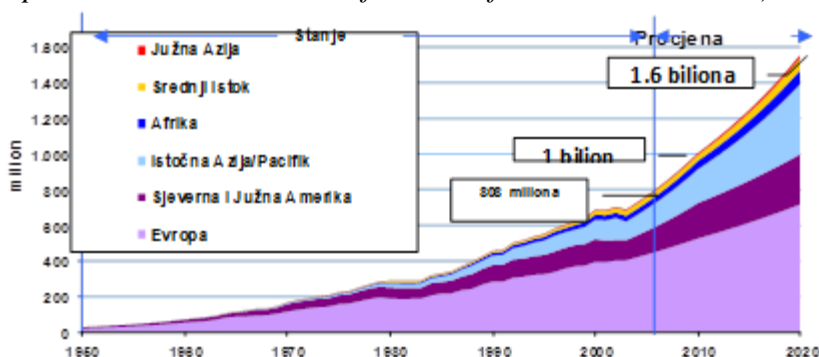
The role of the states and destinations in this context boils down to providing an enabling environment to attract investment and create conditions to support entrepreneurship and innovation. With the given point of view, an important role of the state is in promotion of regional cooperation, since investors do not observe countries separately, but in terms of the region, particularly in the domain of tourism. Therefore, countries belonging to the Western Balkans should use the benefits of market expansion by improving regional cooperation.

Tourism as a global industry

Tourism is an important sector of the international trade in services and one of the widest, most dynamic and most complex socio-economic phenomena of the modern era (Figure 1). Tourism is considered to be a factor of peace and stability in the world, reduction of poverty in the less developed countries and stimulating factor for balanced regional

development. Increasing the mobility of people, strengthening of telecommunication lines, the occurrence of the Internet which enabled interactive communication between producers and consumers all together have influenced the development of tourism as a global industry.

Graph 1: *International tourism arrivals, 1950-2020.*
(Comparison in relation to the forecast of world tourism 2020)



Source: *Market trends, Competitiveness and Trend in Tourism Services Section, UNWTO (according to: Đuranović, M. & Radunović, M (2011): Analiza efekata turizma na BDP, zaposlenost i platni bilans Crne Gore)*

In 2015, there were 1.2 billion of international arrivals, which is 4.4% more than in 2014 (World Tourism Organization - UNWTO). Also in 2015, there were 609 million of foreign tourists in Europe, or 5% more than in 2014. UNWTO estimates that the annual growth rate of international tourist arrivals will be increased to an average of 3.3% from 2010 to 2030. Accordingly, the total number of international tourist arrivals in 2030 estimates to 1.8 billion of tourists.³

It should be noted that the development of tourism as a global industry has a great impact on related industries, such as transport, trade, construction, agriculture and other areas that take part in the creation of tourism products or provide related services. The size and structure of the population, economic potential, technological innovation, political and cultural trends are considered the main factors which will determine future development of tourism as a global industry (Nedeljković, Jovanović, Đokić, 2013). On the supply side, new destinations may

³ <http://www.stuh.hr/novosti-detajli/drzavni-zavod-za-statistiku-objava-22.-rujna-2015./1210>

appear, while some mature destinations should still have a relatively homogeneous tourist product (such as swimming or ski tourism), so the differentiation of the tourism product will gain in importance. Anyway, tourism of the 21st century will be significantly different from the recent policy model of tourism development (Table no. 2).

Table 2: *Tourist requirements and needs*

Characteristics of the current tourism model	Characteristics of the future tourism model
Packages	Individual travel
Longer stay	Shorter stay
Model of one long journey	Model of several shorter trips during the year
Organized (sightseeing, program...)	Decisions are made spontaneously and individually
Comfort and passivity	Activities and participation
Expectations of the number of visitors and the attractions	Expectations of the new experience and quality
The feeling of superiority	Respect and relationship with the hosts
Lack of knowledge about the attractions, culture and traditions of place being visited	Knowledge about the attraction to be seen
Behavior and attitudes of foreigner	Behavior and attitudes aligned with the hosts
Noise	Silence
Mass-produced souvenirs	Personal souvenirs (photos, private recordings)
Lack of interest in the host language	Learning the local language
Fast transport	Fast Transport Less important
The expectation of comfort	Comfort is not essential
The distance between the guests and staff	A good relationship with tourism workers

Source: *Ostrovski, S. (1999): Tourism in the face of 21st century s challenges, Institute of Tourism Academy of Physical Education Cracow, Poland, p. 34*

Interdisciplinarity is a characteristic of both: globalization and tourism, therefore researchers observe both phenomena. In the early stage of the development of globalization in tourism, the industry has taken on a symbolic value - a sign of wealth and cosmopolitanism. (Čomić, 2000). In the further stage of development, the nature of international tourism has changed in the economic, technological and cultural terms (Table 3).

Table. 3: *The interdependence of tourism and globalization*

TOURISM	GLOBALIZATION
Movement of population (Tourists, employees in the tourism industry)	Movement of the population (Immigration, etc.)
Movement of ideas (new cultural values, new business forms in tourism industry)	Movement of ideas (new technologies etc.)
Capital flows (Innovation in the tourism industry, FDI, profit)	Capital flows (Rapid movement)
The need for expansion of new technologies (Open flows)	New technologies
Ancient civilizations (Restriction of certain social groups)	Time-space compression
Strong growth in the past 100 years	Time-space compression
»Travel for all«, the development of world tourism culture	World tourism culture
The need for fostering local culture and authenticity in tourism (Differentiation between different destinations)	World culture

Source: *Kearne, 2004. (adapted from: Koncul, N. (2004): Položaj turizma u globalnim i europskim integracijskim procesima, Naše more, Volume 51, Number 5-6, p. 211.)*

As the main effects stemming from the impact of globalization processes in tourism we can enumerate:

- The rapid increase in potential tourist demand for a number of destinations, since consumers do not attract more than just nearby destinations
- Competition between tourist destinations has become extremely strong
- Small and medium enterprises have to fight for survival in the tourist market which increasingly push global companies
- The emphasis is on entrepreneurship, innovation, specialization and the increasing quality of products and services
- The increase in the need for additional capital to finance the necessary investments for maintaining competitiveness
- Problems for mature tourist destination arise from relationships with suppliers, which are often heterogeneous and do not apply the quality standards (adapted from: Pavlic, I, 2004)

The tourism market is one of the most unstable ones. Current changes in the global market are characterized by increasingly complex requirements for achieving competitiveness of destinations and complex requirements and needs of consumers.

Modern consumer profile in tourism

The modern consumer has changed secondary needs. He is no longer a passive observer, but he is actively involved in creating his environment, what reflects to the destination marketing management. In developed countries, there is a category of consumers 'money - rich and time - poor', which affects tourism with the growth of demand for shorter trips.

The question of balance between time and money has become a key challenge for tourism destination in terms of combining activities, experiences and relaxation for tourists.

Global consumer in tourism at the beginning of the 21st century is characterized by the following features:

- Higher education
- Greater demand in relation with price - quality of service
- Growing concern for health and healthy lifestyles
- Preference for more short breaks through the year instead of one or two longer vacations
- A number of hobbies and interests
- Higher average age
- Belonging to a family with a small number of members (fewer children)
- Continuous use of the Internet as a factor for the availability of a large number of data about the destination in a short period
- Demand for authentic destinations offering specific experience
- Use of low-cost (low cost) carriers (adapted from UNTWO; 2007).

Comparing the second half of the 20th century and beginning of the 21st century, we may see a number of changes on the demand side or in consumer behavior in tourism (Table 4).

Table 4: *The difference between tourism/consumer of the 20th century and tourism/consumer of the 21st century*

20th century (from 50's to 90's)	21st century (late 20th century and begging of the 21st century)
CONSUMER – DEMAND CHARACTERISTICS	
Passive and inert idler	Dynamic and active consumer
Participant of mass travel arrangements	Independent, individual traveler
Organized trips	Fluid organization of travel (<i>Do it yourself</i>) or comprehensive travel (<i>All inclusive</i>)
Booking of travel in advance	Late travel booking
Resting	Experience, activity, education, participation
Careless attitude towards his own health (sun and loitering)	Expecting relaxation of mind and body are expected during the vacation (sports, entertainment, learning, entertainment, excitement, etc)
Tan is paramount	Sunbathing is avoided
Similar tastes for travel and tourism	Pluralisation of tourist tastes
Characteristic demand	Differentiated and segmented demand
Demand is similar regardless of the generation gap	Demand segmented according to common generational characteristics (older, baby boomers, X / Y generations)
Inexperienced traveler	Experienced, educated, sophisticated traveler
Uncritical attitude to the prices (satisfied with the offer)	Critical – seeking value for money
Predictable consumer behavior	Unpredictable behavior of consumers – higher and a lot more individual consumption
Imitation – travelling to well known places	Creation – something new, something different, somewhere else
Seeking well known and popular destinations	Seeking for special and new, runs away from everyday life, looking for authentic and real
Buying what's available (comfortable)	Demanding and finicky, requiring a higher quality and service standard
Careless attitude towards the living environment	Ecologically conscious
Going on vacation once a year	He travels frequently and stay shorter (several times a year, extended weekends)

Source: *Hendija Z. (2003): Potražnja kulturnog turizma - trendovi na tržištu, Institut za turizam, Zagreb (adapted from: Lekić, R: Održivi razvoj turizma posebnih interesa Konavle-Tivat, Zagreb, 2013.)*

One of the strategic goals of tourism destination marketing is to maximize the satisfaction of visitors (Buhalis, 2000). Regardless of the current changes in consumer behavior in the tourism industry, the fact is that mass tourism destination will not stop to exist. But, modern market flows require the existence of alternative offers tailored to the individual consumer, which includes special interest tourism products.

Special interest tourism – opportunity for repositioning Montenegro as tourism destination

Special interest tourism is defined as travel with the primary motivation for the practice or consumption of particular interest, which includes unusual hobbies, activities, themes and destinations that tend to develop niche markets (Smith, Macleod & Robertson, 2012). This consumer group is classified as a special group of consumers/tourists with specific lifestyle. Special interest tourism is cited as an alternative to mass tourism (Table 5), not only as it relates to the concept of economies of small scale, but also because of better dispersion of tourists in the receptive region.

Table 5: *The differences between mass tourism and special interest tourism*

	MASS TURIZAM	SPECIAL INTEREST TOURISM
General characteristics	Rapid development	Slow development
	Maximum development	Optimal development
	Uncontrolled development	Controlled development
	Short term effects	Long term effects
Characteristics of consumer behavior	They moves in a big groups	They move individually or in a small groups
	Fixed travel arrangement (package) in the destination	They make spontaneous decisions regarding various services
	Tourists whose decisions may be directed	Tourists who make their own decisions
	They passively follow tourist events	They want to actively participate in tourism events
	Do not learn foreign language (host language)	Tend to learn foreign language (host language)
	Curious	Tactical

Adapted from: Jovanović, V (2013): *Tematski turizam, Univerzitet Singidunum, Beograd, p. 6*

Some of the forms that are most frequently mentioned in this context are: cultural tourism, business tourism, event tourism, conference tourism, nautical, religious, urban tourism, sports tourism, wine tourism, rural tourism, spa tourism, etc. Special interest tourism has a relatively small share of the global market. Since the world population grows and more people live in urban areas, consumers will be increasingly attracted by special forms of tourism that promote conservation of natural and cultural heritage and sustainable development of destinations.

Also, individual tourists are becoming more interested to attend educational programs in the destination in terms of preserving and improving health, general education etc. which is additional option for the creation of special interests tourism products, such as health, spa, cultural and so on. Furthermore, because of limited potential for substitution of specific products, tourism offers based on specific motives continuously attract not that much price - sensitive categories of tourists and that supports the effective destination marketing.

Tourism is very vulnerable industry to economic crises and conflicts. The world economic crisis, which appeared in 2008, adds to the changes in the global tourism market. According to estimations of the World Tourism Organization (UNWTO), the current world economic crisis, the global epidemics and the increase of terrorism does not reduce the need and motivation of people to travel, but the structure of these trips - an increase in demand for closer destinations, shorter staying in the destination, travel to friends and relatives, while relative stability relates to traveling motivated by special interests (Lekić, 2013).

The fact is that special interest tourism can provide an important asset for economic growth and positioning the destination. The positioning is closely related to market segmentation and target market, considering its focus in selection of type of offer in relation to competition, market segments or target market. Thus, the dynamic form of tourism, known for its specific products, services and target segments, can provide new opportunities for repositioning mass tourist destinations. This is especially important for countries like Montenegro and the region that still face with the challenges of mass tourism, low quality of tourism offers, low price of tourism products, lack of infrastructure and so on.

The challenge is in the fact that destinations cannot be managed such as companies. The destinations mainly consist of a group of smaller tourism companies and other enterprises that realize their own marketing strategies, while the subject of the destination management should be integral tourism product. The focus is on synergetic effects of linking stakeholders in the function of successful destination positioning. Given that market of the Western Balkans is relatively small, co-opetition in the region is necessary for transition from undifferentiated (mass) to differentiated marketing, rebranding and competitive positioning.

Conslusion

Tourism entered a new era, taking the position of the global industry and achieving a significant share of international trade in services. The competitiveness of the tourism market is becoming increasingly complex while demands of consumers support the development of innovative forms of supply. Despite all the changes, a consumer still occupies a central position in the tourism marketing concept.

Globalization in tourism requires the application of the concept of co-opetition. Thus, networking of competitive destinations for combining tourism products or agreements regarding the specialization of individual competitive destination for specific target segments is encouraged.

Montenegro as a country where tourism is a strategic industry should focus its efforts on attracting specific market segments, in the context of diversification, reduction of seasonality of its tourism products, as well as for efficient response to the challenges of global competition. The realization of common vision of Montenegro and the region requires the joint destination marketing management that will map the potentials and encourage the development of contemporary tourism forms.

Anyhow, the destination marketing management of Montenegro and the region should rely on innovative tourism products that include selling experience, rather than physical products. In any case, special interest tourism may be one of the efficient marketing responses for repositioning Montenegro and region towards sustainable destination

competitiveness and increasing quality of living of the local communities.

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