

Implementation of Sustainable Tourism in Protected and Sensitive Areas, a Case Study of the Balkan Mountains, Serbia

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Received: September 2016 | Accepted: December 2016

DOI: 10.18421/TRZ20.04-04

Abstract

The development of tourism in protected areas is a particular challenge for the tourism business and nature conservation. The goal of this research is to discuss an approach, or potential model, that would improve the implementation of sustainable tourism in protected and sensitive natural areas. The paper analyses the case of the Balkan Mountains destination in Serbia. In addition to the case study, the authors used the following methods: observation, content analysis and comparative analysis. This study assumes that community-based ecotourism, as a form of alternative tourism, must embrace individual initiatives within the community as a model of sustainable tourism implementation. It is understood that individual local initiatives must be thoroughly reviewed by all stakeholders. Bearing in mind that the inclusive appreciation not only of nature, but also of indigenous cultures that prevail in natural areas is a part of the visitor experience, this empirical research is primarily focused on the local initiatives concerning the quality of visitor experience in the Balkan Mountains. Preference is given to responsible community-based ecotourism initiatives. This could result in many benefits for the local communities.

Keywords: sustainable tourism, implementation, protected area, local initiatives, community-based tourism, destination Balkan Mountains.

Aims and background

This paper focuses on sustainable development and overviews activities that will contribute to the implementation of a sustainable tourism model in the nature park and tourist region of the Balkan Mountains. It will offer suggestions based on a review of approaches and projects already in existence in this part of Serbia.

The concept of *sustainable development* has become the leading principle of development policies in all fields and at all levels of tourism planning and management (Jegdić, 2011). UNWTO (1993) and it utilizes the *triple bottom line* approach, meaning that the stakeholders

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concerned with implementing sustainable development in a destination take into consideration ecological, economic and social benefits to determine and measure the influence of tourism. It can be argued that tourism and triple bottom line approach are mutually connected through economic strategies, environment protection practices and consultation with local communities and authorities. Valorisation and analysis of influences within these three areas is present and important for the modern concept of protection (Prato, Fagre, 2005), but also for tourism (Fennel, 1999). Tourism in protected areas can unite all three concepts - protection, economic income and social well being of the local population (Stojanović et al., 2014). Collaborative engagement amongst local communities towards planning sustainable tourism projects is indispensable (Godfrey, Clarke, 2000). The United Nations World Tourism Organisation (UNWTO) considers sustainable development to be applicable for all forms of tourism. The most common definition of *sustainable tourism* is conceptual, where the UNWTO (2004) states: „Sustainable tourism should make optimal use of environmental resources [...]. Respect the socio-cultural authenticity of host communities [...]. Ensure viable, long-term economic operations”.

Activities of expert bodies of UN, EU and other international organizations play a very significant role in formulating and implementing the principles and aims of sustainable tourism in the world. By organizing international events and conferences, and the charts adopted in those conferences, they provide irreplaceable contribution to operationalizing theoretical opinions and concepts, and to transfer sustainable development of tourism into the practical field of action. Such are, for example: Charter for Sustainable Tourism, Lanzarote, 1995., European Charter for Sustainable Tourism in Protected Areas, 1995; Declaration of the World Summit on Sustainable Development from Quebec (UNEP-UNWTO), 2002.; Cape Town Declaration, 2002. - Responsible tourism in destinations; World Protection Conference, 2008. – Global partnership for the Criteria of Sustainable Tourism (UNEP-UNWTO) and many others. A charter passed the World Conference for Sustainable Tourism in Lanzarote, Spain (www.gdrc.org/uem/eco-tour/charter.html), for example, determines 18 principles defining how to develop sustainable tourism. It addresses governments, other state bodies, decision-makers and professionals in the field of tourism, government and private associations and institutions, as well as the tourists themselves, amongst other things by appealing that the development of tourism is based on the criteria of sustainability, which means that it must be ecologically enduring, but also ecologically vital and ethically and socially fair for the local communities. Principle 1. states: „...A requirement of sound management of tourism is that the sustainability of the resources on which it depends must be guaranteed“.

Activities of vocational associations in the field of tourism should also be mentioned, such as The Global Sustainable Tourism Council (GSTC), which has developed Global sustainable tourism criteria for hotels and tour operators (GSTC, 2016), and Global sustainable tourism criteria for destinations (GSTC, 2013). Furthermore, there are numerous instructions and guides, such as “Making Tourism More Sustainable – A Guide for Policy Makers” (UNWTO, UNEP, 2005). According to it, the twelve aims for an agenda for sustainable tourism are: economic viability, local prosperity, employment quality, social equity, visitor fulfillment, local control, community wellbeing, cultural richness, physical integrity, biological diversity, resource efficiency, environmental purity.

Sustainable development emphasizes the right of local people to take part in the decision-making process and to be consulted on activities likely to have an effect on their well-being (Wisansing, 2008; Waligo, et al., 2013). *Responsible tourism* is a tourism management strategy embracing potential assessment (evaluation of the community attractions, visitor services,

organizational capabilities, ability to protect resources, as well as market-ing), planning (setting of priorities and measurable goals), management (protection and preparation for visitors), product development and marketing to bring about positive economic, social, cultural and environmental impacts (Reid, et al., 2004).

Community-based tourism (CBT) planning has long been the favored approach, especially in developed countries over the last several decades (see: Murphy, 1983; Haywood, 1988; Simmons, 1994; Timothy, 1999; Richards, Hall, 2000; Reid, et al., 2004; Beeton, 2006; Wisansing, 2008; Okazaki, 2008). There is no significant theoretical work on issues pertinent to sustainable tourism development and planning in the Balkans. This concept of sustainable tourism development widely addresses natural and cultural resources and the (economic) base for which tourism offers and encourages participation among members of a local community in all phases of its creation - from planning and implementing to service delivery and evaluation. The core of this concept can be found within the framework of community focused on developing tourism. CBT planning emphasizes the right of local people to take part in the decision-making process and to be consulted regarding the activities likely to have an effect on their well-being (Wisansing, 2008). Such a framework allows for some form of local control and direction regarding what is still a business-oriented industry (Murphy, 1983). Looking back at some of the initial framework involved with tourism planning, Haywood (1988: 106) defines community participation as „a process of involving all [stakeholders] (local government officials, local citizens, architects, developers, business people, and planners) in such way that decision-making is shared”. Moreover, Arnstein (1969) emphasized that citizen participation has to be accompanied by power redistribution. Power redistribution involves a „ladder of citizen participation” with eight core components: manipulation, therapy, informing, consultation, placation, partnership, delegated power and citizen control (Arnstein, 1969). *CBT model* integrates concepts of the ladder of participation, power redistribution, partnerships (collaboration processes) and social capital (Okazaki, 2008).

Protected areas have been sites of wrangling over nature conservation, livelihoods of rural residents, and tourism development at least since the founding of the first national parks in the United States (Sellars, 2009). As bound territorial units demarcated for limited human use for the purpose of protecting wildlife and ecological processes, for much of their history protected areas have been sites of exclusion. Narratives of environmental protection justify extending state territorial control, enclosing resources for state management, and separating residents from lands central to their livelihoods and identities (Neumann, 2004). The state declares places where people live, farm, hunt, gather, worship, and remember, to be conservation territories that must be protected from their former inhabitants.

Conflicts and injustices resulting from exclusionary conservation leading to two interwoven turns in conservation practice: the participatory turn and the market turn (Zinda, 2017). The participatory turn manifests in efforts to recognize that residents’ use of protected areas can enhance, or at least not undermine, conservation; to involve residents in management and decision-making; and to provide residents with benefits in exchange for taking part in conservation (Lele, et al., 2010). This merger of participatory and market techniques is often called neoliberal conservation (Igoe, Brockington, 2007). Neoliberal conservation couples a roll-back of previously existing forms of coercive state management to a roll-out of programs bringing in private firms and non-governmental organizations (NGOs) to facilitate community-based conservation efforts, making conservation spaces more available to private capital (Büscher, et al., 2012).

When applying the concept of participation and power redistribution to tourism, such empowerment would stipulate that tourist destination communities, rather than governments

or the multinational business sector, hold the authority and resources to make decisions, take action and control of tourism developments (Timothy, 2007). It is important to generate money for the benefit of local communities without compromising the environment, this links back to the triple bottom line approach.

Methodology

The aim of this research is to discuss an approach that would improve the implementation of sustainable tourism in protected and sensitive natural areas. Considering such aim, the approach of qualitative case study was applied (Yin, 1989). Qualitative, or non-frequency sensitive content analysis, identifies trends and latent features of messages in the document content by identifying semantic layers (Creswell, 1994). The research was realized in the form of a transversal study of empirical character. The research employs analytic-synthetic, bibliographic-speculative and empirical methods. General analytical-synthetic method of research is used in the paper, spanning from the bibliographic-speculative to empirical approach, with the application of document content analysis technique. Research results indicate possible guidelines and models for further development of sustainable tourism in protected and sensitive areas.

Tourism and geography of Balkan mountains

Balkan Mountains, Bulgarian and Serbian: *Stara planina* (Old Mountain) or Balkan, is a mountain range mostly situated in Bulgaria, with its highest peak Botev at 2,376 metres, while the highest peak in Serbia is Midžor at 2,169 metres. The length of this mountain range in Serbia is nearly 100 km and the area above the altitude of 1500 metres is 110 km², while another 330 km² are between the altitudes of 1000 and 1500 metres above the sea level (Milijić, 2005). The Balkan Mountains in Serbia became protected as a nature reserve in 1997, documented as a first category „nature park“, before becoming the largest protected nature reserve in Serbia with the area of over 142,000 ha (Službeni glasnik RS, 1997). Initial studies assessing the preservation of Balkan Mountains were drawn out in 2003. In 2007, a spatial planning approach was considered leading to the formation of the Balkan Mountains tourist region. By harmonizing these two documents, current zones of protection I, II and III were made, providing optimal protection. Balkan Mountains is on the list of internationally important bird areas (IBA), important plant areas (IPA), primary butterfly areas (PBA), priority habitats of the Ramsar convention (peat bogs), *Emerald* list, the list of protected border areas within the GREEN BELT (IUCN) programme and the *Pro geo* list (which indexes geological treasures of Europe). Applying for the biosphere reserve (UNESCO – MAB) status is pending (Stankov, et al., 2011).

The Balkan Mountains possess a wide range of attractive tourist resources from natural to cultural heritage, to events and gastronomy. Concerning natural treasures, the recognizability of Balkan Mountains is reflected in the attributes of sustainable tourism – rare landscape forms, relicts and endemic species of flora and fauna (Dragović, et al., 2011). Potentials for eco-tourism development lie in preserved natural characteristics and biodiversity (Stankov, et al., 2011), but also in exceptional geological diversity (Jovanović, et al., 2012). Horizontal and vertical stratification of the mountain favours the creation of winter sport facilities. Treasures in the immediate vicinity scattered amongst the existing villages are also of extreme value

(see Horwath HTL, Ecosign, 2007). A large number of existing biological species and ecosystems require sustainable development projects and programmes to ensure their protection and maintain the fragile resources of the area, found on the following website: www.logos.org.rs/htm. During the elaboration of the Master plan (strategy) of Balkan Mountains, tourism developments focused on primary attractions include: high-altitude areas above 1500 metres, thermal springs (Gamzigradska spa, Nikoličevska spa, Rgoška Banjica, Dag Banjica, Zvonačka spa) and archaeological sites (Felix Romuliana, Timakum Minus, Via Militaris and the Kale fortress) (see Horwath HTL, Ecosign, 2007). In the Spatial plan of Serbia (2010), Balkan Mountains is noted to be a year-round destination.

During the creation of the area spatial plan designating the Nature Park and tourist region of Balkan Mountains, conflicting interests between the protection of natural values and tourism development emerged (Maksin Mičić, 2008). The Institute for the Conservation of Nature, as an organisation concerned with the areas environmental protection stressed that a continuous zone of protection of the first degree should be drawn along the main ridge of Stara Planina (about 50 km in total) in the altitude region above 1400 meters, encompassing an area of 70 square kilometers. The planners also identified the highest part of the ridge as a segment with the greatest potential for the development of ski runs. A compromise was reached of having 40 kilometers of the ridge area placed under the status of the protection of natural resources, while 10 kilometers would be dedicated to the development of a ski resort.

Sustainable tourism projects on Balkan mountains

Major projects within the Master plan

Tourism development projects on Balkan Mountains will significantly transform the physical, cultural, infrastructural and economic agendas of the entire region (Horwath HTL, Ecosign, 2007). Additionally, four municipalities that share the area of Balkan Mountains (Knjaževac, Zaječar, Piroć and Dimitrovgrad) will be incorporated into the wider context of the project. It should include the four closest municipalities, in addition to Niš – a larger urban center, which has an international airport (accessibility) and a university. Using detailed analysis of location characteristics and by applying international standards in planning the number of skiers per hectare, the maximum skiing capacities for each of the locations were defined. It was determined that the maximum capacity of Balkan Mountains in total is about 26.8 thousand skiers at any point (Horwath HTL, Ecosign, 2007: 93). The optimal number and structure of accommodation units was determined by using international standards regarding acceptable concentration of certain types of accommodation (Table 1), as well as the comparison of presence of various accommodation types.

In addition to Jabučko Ravnište, as a central place of the Balkan Mountains resort containing the largest part of the accommodation, other capacities include public parking and a large part of the mountain infrastructure-with three more locations intended as the base area (Leskova ravan, Babin Zub i Golema Reka).

Even though the Balkan Mountains project was established as a ski resort project, the participants in the workshops organized in the Master plan elaboration phase have agreed that the entire idea on mountain 'tourismification' must not only be based on skiing. A wider range of tourist products would enable year-round and more diverse touristic experiences which would better sustain local economies. Special workshops were organized with the local stakehold-

ers, where seven key tourist products were defined, these being: mountains and lakes, business tourism and MICE, events, health tourism – health and wellness, special interests, rural tourism and city breaks (Horwath HTL, Ecosign, 2007).

Starting from the scarcity of capital infrastructure and the significance of this project for the increase of economic wellbeing, the role of the public sector should focus on the creation of basic prerequisites for touristic activities in Balkan Mountains. Given that this area is extremely underdeveloped, tourism development will require efficient space, strategic management agendas and controlling the ecological balance of the natural environment. The public sector would be responsible for planning and spatial/urban implementation of projects, infrastructural equipment, as well as managing skiing in the area. The responsibility of implementation in terms of building the tourist infrastructure, tourist capacities and other service content should be taken over by the public sector. Non-Governmental Organizations (NGOs) should be given opportunities to implement programs, especially those which will aid the development of tourist activities in the local community. NGOs could conduct programmes of capacity building, entrepreneurship training, setting/monitoring standards of ethical business practices/codes of behavior, support and protection of underrepresented participants from the local community (see Jegdić, et al., 2013).

Local initiatives

Sustainable tourism requires a high rate of local participation to achieve planning and development objectives. Particularly significant is the role of local NGOs to facilitate and plan useful projects pertinent to rural development and tourism that aim to include the local population in such activities. One should emphasize the possibility of applying for grants from international development agencies that fund programs encouraging the protection of biodiversity and 'green' initiatives, the development of local cooperatives, small enterprises and poverty reduction. Many such initiatives are being implemented or have already been realized on Balkan Mountains. Several of these are discussed below.

Balkan Mountains Nature Park – Eco Tours, 2010

The Fund was created to support civil society in Serbia in cooperation with the Society for Advancement of Education. Društvo (Association) za Unapređenje (for upgrading) Obrazovanja (education) (DUO) NGOs from Belgrade and Logos, in collaboration with the Association of Education Workers from Pirot have included Balkan Mountains in the project of forming mechanisms of protection of biodiversity. Their aim is to reach sustainable development through ecotourism and environmental education. Ten eco-tour programs were created for different locations within the destination. Such tours include: ecosystems of high mountains, panoramas and vistas, water, forest and meadow ecosystems, tradition, geo-heritage and art (culture) with nature and outdoor activities (Internet 3).

„Old Mountain – New Network“ project, 2007-2013

The goal of the project was to form a knowledge base for planning, problem solving and development on Balkan Mountains. The project was realized by the Faculty of Management from Zaječar, the local administration of the City of Vidin, Bulgaria and RARIS (a regional development agency of eastern Serbia). The project was financed through Bulgaria-Serbia IPA

cross-border cooperation. Cooperation efforts will involve four key areas of development: infrastructure, agriculture, environment and tourism. The Knowledge Base itself consists of three data sub-bases: 1. Plan and development documents 2. Profiles of experts in the cross-border region; 3. Research studies of the region (Internet 5).

Cross-border cooperation through management of common natural resources – promotion of networking and cooperation between the countries of Eastern Europe

This project was promoted in partnership with Bulgaria, initiated in 1999 by the EU Council. It is in the group of projects for the stability of South Eastern Europe ReREP. The model of cross-border cooperation was recommended as a solution for general protection of biodiversity, but at the same time, also as a concept the role of which is participating in the European „Parks for Life“ initiative. The Swiss Agency for Development and Cooperation and the Regional Environmental Centre for Central and Eastern Europe (REC) have joined the initiative of the Stability Pact for South Eastern Europe. In 2000, three cross-border projects were launched: „Cross-border Management of Natural Resources“, „Promotion of Sustainable Tourism and Organic Agriculture“, and “Protection of Old Breeds of Domestic Animals“ (Internet 1).

The Balkan Mountains Euroregion

With the help of the Swiss Agency for Development and Cooperation (SDC) and within The Regional Environmental Center for Central and Eastern Europe (REC) led by the Regional Environment Centre in Serbia and Bulgaria, the Euroregion of Balkan Mountains was created in 2001. It includes a network of legal stakeholders from Serbia and Bulgaria represented by the Regional Association for North Western Balkan Tourism Development from Bulgaria and Association for Development of the Balkan Mountains Region from Serbia. A joint vision of Balkan Mountains development was expressed, feasible through its economic and social revival, retention of youth and increase of economic prosperity based on cross-border development of cross-border tourism, agriculture, as well as the region’s nature and culture protection (Decentralizator, 2010, 17).

Encouragement Program for Development of Villages and for Preservation of Biological Diversity in the Natural Park of Balkan Mountains for 2012

STAR project was supported by the World Bank and the Global Environment Facility (GEF) as a part of a wider project of reform of agricultural areas in transition. It primarily targets small-holder (household) farms operations, but also associations and entrepreneurs from the Stara Planina region. In 2012, this programme offered support to the following sub-programs: (1) Development of rural tourism in pilot villages of the Balkan Mountains Nature Park: Gostuša, Dojkinci and Senokos; (2) Increase of competitiveness of agriculture in the Balkan Mountains Nature Park and (3) Projects in the field of sustainable rural development and preservation of biodiversity (Internet 4).

“There are potentials, let us use them” Project, 2009

Based on data collected among interested locals who own real estate in Balkan Mountains and wish to engage in tourism, a unique database of tourist potentials of the municipality of Pirot

was formed. One pertains to categorizing buildings of the Balkan Mountains villages, while the other presents problems and prerequisites of parties interested in engaging in tourism. The project was funded by the Serbian government. The project was realized by the Association for preservation and advancement of old arts and crafts „Grlica“, Pirot (Internet 2).

„Educational adventure“, Knjaževac - Balkan Mountains, 2012

The models used and combined are educationally based and focus on entertainment centers, discovery centers and theme centers. These are destinations that have family friendly initiatives inclusive to young children. The concept was developed within the UNICEF component of the UN programme of „Sustainable tourism in the function of rural development“ (Internet 6).

„South East Development Network“

Association of regional development agencies of Southern and Eastern Serbia, formed in 2012. The basic goal of association is strengthening of capacity to realize regional development (Internet 5). There is also an initiative to form a regional tourist organisation (RTO). A RTO would provide additional impetus to the development, although a better solution would be forming destination management, or marketing organizations (to encourage public-private partnerships).

Implementation of sustainable tourism

To provide an overview for the initiatives discussed above, we can conclude that the Balkan Mountains destination is one of prime importance and will contribute to the National Strategy aimed to promote sustainable tourism development in Eastern Serbia. A prerequisite for every successful development project and programme is efficient planning and an adequate approach, spanning from strategy to implementation. The community should begin this process using a partnership approach—involving all stakeholders. Implementing sustainable tourism practices and initiatives in a destination is dependent upon collaborations and the merging of ideas out of the projects identified by the community—to enable and deliver sustainable development. Previous experience in Serbia shows that communities are not the main problem of strategic planning for sustainable tourism, on the contrary, project implementation and management strategy was seen as needing much improvement (Lukić, Pašalić, 2011: 304). The impact of tourism on natural and social environment of the destination is largely conditioned by stakeholders leading the development process. They range from those involved in tourism, including tour operators to local/national governments, local communities and NGOs. The creation of strong partnerships and inclusion of all stakeholders in the process of planning and implementation of sustainable tourism projects will prove to be more efficient.

Investment and development of Balkan Mountains as a tourist destination should, in its first phase, be provided by the public sector, because this phase entails (physical) infrastructural investment. It is only after larger infrastructural investments that private investments and the forming of a new market structure for this particular area can be expected - or even achieved. The main danger to sustainable tourism through the implementation of the Balkan Mountains ski resort mega project lies in an undeveloped local entrepreneurial structure. Only

small businesses, apart from the employment, which needs to be primarily local, and can hold objective interest among local private and public stakeholders in this project. The necessity to include foreign partners adds responsibility and caution among local authorities - primarily in terms of using natural resources and respect of established potential maximum capacities. The public sector should play an important role in the implementation through its spatial and urban planning regulations and elaboration of technical documents. This also includes the preparation of subprojects to be realised by the private sector and an immediate control of their realisation. The only way to create an attractive integral offer of sustainable tourism, supported by the NGO, is going to be through public-private partnerships.

The basic research question upon which this case study of the Balkan Mountains was based on was: how to steer all individual local initiatives to sustainably focus on the creation of an integrated tourist offer and attractive tourism products and services that can attract domestic and foreign visitors. From the aspect of CBT initiatives, the Balkan Mountains are exclusively managed at the level of individual activities and those of civil society organizations that carry out their activities, which focus primarily on achieving a certain level of visibility as it is still insufficient to achieve greater impact in promoting the destination. On the other hand, the existence of such initiatives is important because they represent the real strength and capacity for the development of cooperation and partnerships in the community. Each of the potential projects need to be assessed in accordance with broader goals that were considered/determined, and further discussions are needed with key stakeholders involved in order to improve networking, increase knowledge exchange and build on essential skills.

Concluding remarks

According to the five-phase of the life cycle model of the destination (*Exploration, Involvement, Development, Consolidation, Stagnation - decline or rejuvenation*), which was developed by Butler (1980: 8), the development of Balkan Mountains as a sustainable destination is in the second phase – *involvement*, i.e. engagement and implementation. Following the normative regulation of protection and sustainable use of the Nature Park and development of the Master Plan, at this stage, the public sector should play a significant role in building the infrastructure and invest in promotion. After a period of 3-4 years, where parallel top-down and bottom-up initiatives will be finished, the third phase needs to be initiated - *development*, which is fully expected to be successful.

After the implementation of planned projects on Stara Planina, a future overlapping of mass ski tourism and selective forms of tourism is certain. The goal should be to have all forms of tourism develop in a sustainable way. Image should be carefully created in order to position Stara Planina as a sustainable destination. In addition to the protected zones singled out within the Nature park and base areas for the location of the Stara Planina mountain resort, areas for ecotourism, special interest activities, rural and other forms of sustainable tourism should also be planned. Cooperation established between stakeholders regarding sustainable tourism implementation on Stara Planina should be expanded by initiating institutional forms of partnerships, strategic alliances and cooperations, as well as networks and clusters. The essence is to base the overall tourism development on the principles of sustainability and the optimal implementation model founded on local initiatives.

Analysis indicated the situation and the problems they encounter, and the general conclusion that can be drawn is that successful operation of community-based ecotourism destina-

tions needs the support of state and local governments, because the institutional framework is set and strategic planning of destination is provided in this way. Furthermore, it is necessary to involve the individuals, groups and organizations from the local community in the planning and implementation of sustainable tourism, because they are the most familiar with the situation in the field and have a sensibility for the analysis of the capacity and capabilities on the local level. Although it requires some work regarding the creation of particular mechanisms, the cooperation of local authorities and other members of the community must be enabled. Moreover, local authorities must have a high level of functionality in order to produce adequate outcomes useful for planning. Feedback from the members of the community and research are of great importance for understanding the success of this concept, as well as the constant effort to establish and maintain the quality of the original values upon which the development of tourism in the destination was founded. Of course, despite these relatively universal drafts, any planning of a community-based ecotourism destinations should be adapted to the local context and conditions of the community.

The implementation of sustainable tourism is also a very promising area for future research. Analyzing more examples from many different countries surely will allow the addition of different models of CBT initiatives, as joint-venture and other forms of intersectoral partnerships.

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