

Swot Analysis of Tourism on Kopaonik and the Spas of its Piedmont

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Abstract

Kopaonik and the four spas of Jošanica, Lukovo, Prolom and Kursunlija, of its piedmont occupy an area of approximately 3,400 km² with a population of 110,000 inhabitants. In terms of administration, the researched area is disposal of 11 municipalities. In some municipalities, tourism has been developed and improved according to plan, with the municipalities of Raška, Kuršumljija and Brus being the leading ones. In the development plans of these municipalities, tourism has received priority importance. In addition to the numerous indicators of sustainable tourism development of this mountain-spa region, the SWOT analysis certainly contributes significantly to a clearer view of this situation. Through specific examples of “advantages and opportunities” the SWOT analysis will indicate the link of reality of tourism with opportunities of the region and offer guidelines to ease some of many years’ disadvantages and shortcomings. “ Five key factors for the mountain and spa tourism of Kopaonik will be exposed to the authors in the thesis through analysis and comments.

Key words: *Tourism, Kopaonik, spa*

Introduction

Amongst all of the mountains in Serbia, through many special features, especially with its dimensions and tourist attractiveness, Kopaonik stands out. Kopaonik (with an area of 2.758km², the highest peak Pančičev peak 2.017 m altitude) is a mountain touching the central and southern parts of Serbia, famous for a series of occurrences that orient this mountain towards the development of several types of tourism (Stankovic, M., S., 2003). Also, in order to preserve this natural treasure, in 1981. Kopaonik was proclaimed a national park that covers an area of 11,810 hectares (Miljanović, D., 1999).

In the first decade of the twenty-first century, Kopaonik is, tourist-wise, the most visited mountain in Serbia with significantly higher number of tourists in the winter. Mountain tourism in Kopaonik has several times larger in scale than the spas of its piedmont, although

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the spas in this region have a long tradition in providing a variety of balneotherapeutical services. Jošanica, Lukovo, Prolom and Kuršumlija Spas are located in the piedmont of Kopaonik and they belong to Kopaonik-Jastrebac spa zone. Like the whole Kopaonik piedmont, they are rich with mineral, thermo-mineral, gaseous and radioactive springs (Stankovic, M., S., 2002).

Jošanica Spa (20°45'21"east longitude and 43°23'25"north latitude) covers the northern and north-eastern part of Kopaonik piedmont. At an altitude of 555 m, it covers an area of 360 ha and has the characteristics of a mountain spa. It is known for its thermal water temperature of 78°C, making it among the first ones not only in our country but in Europe as well. (Dukic, D., 1980).

Lukovo Spa (21°02'35"east longitude and 43°09'52"north latitude) is located in the east Toplica piedmont area of Kopaonik, with an area of 40 ha and an altitude of 681 m. Thanks to the exposure to the Kopaonik piedmont, it is the only one that completes its tourist and spa facilities with mountain elements. In terms of the number of hot and mineral springs Lukovo Spa is the richest spring area in Serbia, with a yield 76-81 l / s (Maćejka, M., 2003).

Prolom Spa (21°25'30"east longitude and 43°02'40"north latitude) lies at an altitude of 598 m above sea level, in the wider south-east Kopaonik piedmont, with an area of 60 ha. Medicinal hyper-thermic waters of Prolom Spa enabled this, most visited spa of Kopaonik's piedmont in 2002, the sixth place among the Serbian spas with 100,522 tourist overnight stays. (www.stat.gov.rs, 2003).

Kuršumlija Spa (21°15'40"east longitude and 43°03'20"north latitude) is located at the extreme south-eastern slopes of Kopaonik in the Banjska River valley, at an altitude of 440 m and covers an area of 44.53 acres. A long tradition and use of hypothermic water as well as peloid therapy did not prevent this spa, for a variety of subjective and objective circumstances, from unfortunately closing in 2006.

Analysis Methodology and Accompanying Commentary:

In considering the current state of tourism in Kopaonik and the surrounding spas and in establishing directions for quicker and complementarily conditioned development of this mountain spa region, a SWOT analysis is necessary and important for tourism development. The following key factors were taken into consideration for the SWOT analysis (Alošević, M., Lukic, S., 2006):

1. General infrastructure and transport
2. Tourist Products (Natural and cultural values, attractions and tourist infrastructure)
3. Human Resources and the Labor Market
4. Relations with other public and private sectors; and
5. Organization, management and promotion of tourist development

The connectivity of the researched region in the broader region is seen in its connectivity with similar mountain-spa regions, both in the country (Stara Planina, Zlatibor, Zlatar, Divčibare), and abroad, especially the regions in Bulgaria (Bansko, Pamporovo). Connectivity of the spas of the Kopaonik region is very distinct, especially towards the well-known spas with long traditions in the vicinity (Vrnjačka Spa, Mataruga Spa, Bogutovac Spa, Novi Pazar Spa and Sijerine Spa, and here we have to separate the Vrnjačka Spa as the most visited spa in Serbia for a long series of years.

Table 1 SWOT Analysis of the general infrastructure and transport

Strengths	Weaknesses
<ul style="list-style-type: none"> - Located in an area which is linked to other tourist regions; - An existing and mostly modernized transport network; - Continued energy provided (electricity, water); - System of protecting the environment; and, - Developed base and mobile telecommunication networks and internet. 	<ul style="list-style-type: none"> - Lack of European road corridors; - Marginalized existing railroad transport; - An outdated and ill-maintained water and sewer network; - Technologically outdated electrical distribution network; - Lack of tourist signage; - Lack of parking space (especially on Kopaonik); and, - Non-implementation of laws and penal measures (protection of the environment).
Opportunities	Threats
<ul style="list-style-type: none"> - Projects for regional corridors (under way); - Interest in investing in the infrastructure; - Fall in prices of telecommunication and informatic infrastructure; - Developed standards for infrastructure and transport; - Fall in prices of infrastructural equipment for winter tourism; and, - Fall in prices of infrastructural equipment for balneo-therapeutic, wellness and spa treatments. 	<ul style="list-style-type: none"> - Lack of local sources of financing infrastructure and transport, especially in certain spas; - Lack of foreign guests because of weak foreign marketing as well as poor previous experiences; and, - Loss of market because of lack of quality accommodation capacities (Kuršumljia and Jošanica Spas).

With help of funds from the Ministry of Economy and Regional Development, while using the fall in prices of infrastructural equipment, in the period of 2008-2010, the amenities on Kopaonik were enriched with a system of artificial snow makers for trails with 35 snow “cannons”, and 215 “giraffes” (devices for high dispersion of artificial snow). Modernizing the ski lifts was done during 2006-2011, so instead of two-seater ski-lifts, tow-ropes and lifts, now there is a system of one six-seater and seven four-seater express and mobile ski-lifts. In the same period, more than 20 km of pipelines were placed, and two artificial lakes were created as support for the artificial snow system (Lakes Krčmar and Mali Karaman). (www.skijalistasrbije.rs, 2011)

A similar drop in prices is also the case for equipment for balneo-therapeutic purposes. With their exclusivity and, lately, richness of activities and amenities, hotels with numerous wellness and spa treatments have imposed themselves too (Hotel Grand – Kopaonik, Hotel Kopaonik – Lukovo Spa, Hotel Radan – Prolom Spa) (A.d. Planinka, 2010, www.mkmountainresort.com, 2011).

Problems which occur both on Kopaonik and in the spas are listed through special elements in Table no. 1. Infrastructure and transport have to receive attention, because these problems have been either put off or have been inadequately or partially solved. The problem of parking on Kopaonik during the ski season creates complete transport chaos, which at an altitude of 2000 m is completely unacceptable.

After the skiing season on Kopaonik ends, a noticeable problem of the lack of coordination between municipalities regarding communal maintenance and cleaning remains. Large amounts of rubbish and garbage are not in the ecological plans of environmental protection and the law is still very tolerant at this altitude.

A good telecommunications network (TV KOP) and the internet, enables numerous cameras to capture the happenings and events in the tourist center, and the moments of enjoyment on the trails Kopaonik.

Table 2 SWOT analysis of tourist products

Strengths	Weaknesses
<ul style="list-style-type: none"> - Citizens of the area (hospitable, open, simple); - growing number of additional activities; - skiing capabilities of the mountain massifs; - wealth of mineral springs and traditions of spas; 	<ul style="list-style-type: none"> - Lack of protection and maintenance of resources (especially in Kopaonik National Park); - Lack of, and disdain for, protected areas; - Lack of spatial and urban plans; - Lack of initial infrastructure for building new edifices for ;
Strengths	Weaknesses
<ul style="list-style-type: none"> - untouched nature and wealth of rural areas; - exceptional cultural and historical heritage of the greater area; - gastronomy; and - a centuries long tradition of services and restauration. 	<ul style="list-style-type: none"> - accommodation (Jošanica and Kuršumljija Spa) - Unresolved urbanistic and illegal construction problems; - Lack of new tourist attractions.
Opportunities	Threats
<ul style="list-style-type: none"> - Application of innovations in tourist management; - Positive opinion about Serbia as a whole on the foreign market; - Availability of spa tourism products for a wide range of clients; - Expected positive reaction to a new, unknown foreign destination; - Direction of holidays and vacations to shorter and more often breaks in a new destination; - Increased privatization and stability of tourist enterprises; - Conditions for the development of health tourism. 	<ul style="list-style-type: none"> - Lack of quality and loss of locations for tourist development; - Quick development of competition from spa destinations; - Lack of interest from local and other inveators (especially Jošanica and Kuršumljija Spas); - Lack of professionally formed products for foreign tourists; - Lack of accessibility of mountain tourism products to a wider range of clients; and - Financially unfavorable packages compared to competitive centers in the surrounding countries.

The tourist capabilities of Kopaonik haven't been fully valorized. A mountain which has 7,000 beds mainly in basic accommodation capacities, has a very low degree of usage of capacities in a series of years (around 16%) (Tourist Organization of Brus, 2010; Tourist Organization of Kuršumljija, 2010; Tourist-Sport Organization of Raška, 2010).

The researched spas, mainly with treatment functions, using the warm and curative water from their springs are more and more assuming the shape of modern therapeutical and rehabilitative centers of Europe.

Completely contrary to mountain tourism, spa tourism and spas offer stays in their accommodation facilities at much more advantageous rates, which results in a continued rise of tourist visits. (A.d. Planinka, 2010).

The cultural heritage of this area is seen through the large number of cultural and historical monuments, especially monasteries (Petrova Church, Monastery of Grada, Monastery of Stara Pavlica, Monastery of Svete Bogorodice (Holy Theotokos) and Svetog Nikole in Kuršumljija, Monastery of Žiča, Monastery of Studenica, Monastery of Djurdjevi Stupovi and Monastery of Sopoćani), which in the future should be looked at through the prism of summer tourism. In the newest plans for the development of Kopaonik, the accent is exactly placed on this aspect and its complementarity with the spas in the region (Bojović, G., 2010).

From the newest analyses done in Prolom and Lukovo Spas, it can be concluded that a new group of interested clients – tourists, is forming, with a very short time of stay (3-4 days). The motives of such groups are intensive vacations with using the amenities of modern hotels, and often of a business, conference-conventional nature. Planned packages (extended weekends, celebrations of New Year and other holidays, recreational school-classes and excursions) point out and cater to such clientele (A.d. Planinka, 2010).

Kopaonik is visited by 81% of the tourists which stay in this region (90,499 tourists in 2008.), mainly domestic. Lack of accessibility of the tourist products of this mountain are seen through the tourist turnover and the number of tourists which in an extended period of time, is not recording a significant increase. The financial element certainly has to be taken into account, because it presents a limiting factor for the stay on this mountain, especially having in mind family holidays (transport, accommodation, ski-pass, etc.) (Bojović, G., 2010).

Not numerous, yet still present on Kopaonik, and its protected zones within the national park, are examples of illegal construction. Similar examples are less to be found in the spas of the region.

Special attention needs to be paid to the lack of professionally formed activities for foreign tourists. In support of this, the general lack of foreign tourists on Kopaonik and the spas is evident. In 2008, Kopaonik was visited by only 8,044 foreign tourists, with an effective average stay of 5.1 days, while in the same year; all of the researched spas recorded 383 foreign tourist visits, with an average stay of 8.1 days. (Bojović G., 2010).

Table 3 SWOT Analysis of Human Resources and Labor Market

Strengths	Weaknesses
<ul style="list-style-type: none"> - Positive attitude of citizens towards tourism; - Traditionally positive mentality and tendency towards quality of tourist services; and; - Existence of several middle, college and higher level educational facilities (private and state) in Serbia. 	<ul style="list-style-type: none"> - Lack of possibilities for the economically positive sides of tourism; - Lack of managers in tourism; - Lack of cadres for new occupations (animators, recreators, guides); and, - Lack of new positions in tourist organizations and municipal structures.
Opportunities	Threats
<ul style="list-style-type: none"> - Availability of foreign funds for for education and development of cadres; - Application of European regulations of work and employment policy; - Interest from foreign institutions for education in the tourist sector; and, - Availability of internet. 	<ul style="list-style-type: none"> - Level of service inadequate, and partial dissatisfaction of users; - Lack of growth in productivity (except in Prolom and Lukovo Spas); and, - Loss of once established positions in tourism.

In the concise SWOT analyses, it isn't always possible to point out to some important elements which bring about certain „strengths or weaknesses“. Such a case regarding human resources and the labor market are the tourist organizations. In Kuršumljija, one of the least developed municipalities of Serbia, the tourist organization of “Planinka”, which exists from 1964, and which in close cooperation with the TO Kuršumljija, continues to successfully and constantly present itself for developing tourism in the Toplica Region with a number of activities. Another good example if such an organization is the tourist-sport organization Raška, which has especially strengthened and enriched its activities with additional amenities in 2009. and 2010, in cooperation with new owners of tourist edifices such as MK Mountain Resort (Tourist Organization of Kuršumljija, 2010; Tourist-Sport Organization Raška, 2010).

In the period of 2005-2010, although there were actual meetings and negotiations with foreign schools for the education of cadres in tourism, the only realized cooperation was with Austrian tourist experts, whose given suggestions were implemented in the development of Prolom and Lukovo Spas (A.d. Planinka, 2010).

Table 4 SWOT Analysis of the relations with other public and private sectors

Strengths	Weaknesses
<ul style="list-style-type: none"> - Healthy and quality food; - Existence of cultural manifestations; - Expressed will of municipal structures for the priority role of tourism; and, - Support of tourist structures for tourist organizations. 	<ul style="list-style-type: none"> - Aging and elderly households in rural tourism; - Inadequate cooperation with existing institutions in town (except for Raška-Kopaonik, and Kuršumljija – Pro-lom and Lukovo Spas); - Non-implementation of policy of protection of cultural and natural resources; - Weak presence of cultural institutions in the tourist offer; and, - Manufacture and offer of souvenirs.
Opportunities	Threats
<ul style="list-style-type: none"> - Interest of rural households for tourism; and, - Initiatives for accompanying tourist offers (manufacture of souvenirs, hand-crafts). 	<ul style="list-style-type: none"> - Low level of offers and partially dissatisfied users; - Lack of growth in activities complementary to tourism; and, - Loss of position with competition.

The tourist region of Kopaonik and the spas in it's vicinity boasts with a number of different manifestations (Days of Helen of Anjou, Art Colony "Bele Crkve (White Churches)", Spiritual ceremonies of Raška, Golden Hands of Brus, Days of Proja and Bread, Hay-Cutting on Badanj, Days of Boletus Mushroom and Blueberries on Kopaonik, First fife and Miss Pro-lom Spa, Ski run "without borders"), which also serve to promote the untouched eco-environments. Manifestation of this type are used for asserting the area where natural, healthy and quality food is grown. That food, attractive for tourists, is made by the local populace in traditional and often forgotten ways (Tourist Organization of Brus, 2010; Tourist Organization of Kuršumljija, 2010; Tourist-Sport Organization of Raška, 2010).

The age structure of the population is surely not the best element of the development of tourism in this region. Certain settlements are comprised of only a few elderly households, and between the censuses in 1991 and 2001, there have been several settlements without inhabitants (Tačevac, Vukojevac in Kuršumljija Municipality) (www.stat.gov.rs, 2003).

The accent is placed on the ties of tourism with numerous public and private sectors, although some of them are a limiting factor in faster, better and a more complete tourist offer of this region (infrastructure, communal services, transport). The listed services also partially affect the demographic structure of the population. It should, in addition to expert cadres, be educated and activated through production of healthy and organic food, as well as manufacture of souvenirs and hand crafts. (Bojović, G., 2010)

The institutional base, using the existing tourist values of Kopaonik and the spas, has managed to impose tourism as the base and moving motto in the whole region. Also, this stance has influenced a stronger consciousness of the state, advantages and problems and inadequacies of the tourist activities. As a positive and long expected example, it can be said that the crucial problem of waste water from Kopaonik was beginning to be solved in 2010. with certain drainage works.

Unregulated property and legal issues, especially on Kopaonik, on the relation National Park – private properties, bring about unresolved and problematic relations. A similar scenario can be seen by "Devil's Town" – Džavolja Varoš, just because the property owner there is "Srbija šume" (Kopaonik National Park, 2009; Tourist Organization of Kuršumljija, 2010).

One of the candidates for a new world wonder – Džavolja Varoš, has received funds from the subsidies from the Ministry of Economy and Regional Development, as well as the Ministry of the Environment and Spatial Planning. Although a rare case, it is worth mentioning as it is case of state investment for the development of tourism in the interior.

Table 5 SWOT Analysis based on the organization, management and stimulation of development of tourism

Strengths	Weaknesses
<ul style="list-style-type: none"> - Existence of the basic institutionalized base (Law on Tourism), - Existence of tourist services; - Existing awareness of problems in mountain and spa tourism; - Interest from the city towards tourism (as a source of income); - Growing rating of the tourism of Serbia in the rehabilitation of tourism (TSO Raška, TO Kuršumljija); and, - Existing documentation on tourist resources. 	<ul style="list-style-type: none"> - Insufficiently acceptable visions for development of tourism; - Lack of cooperation with the institutions in the broader region; - Lack of understanding of the importance of support for potential investments; - Unregulated property and legal relations (especially in the line Kopaonik National Park – private property); - Lack of coordination between sectors in securing support for loans in the private sector, - Long process in obtaining permits; - General regulations in the tourist sector.
Opportunities	Threats
<ul style="list-style-type: none"> - Interest and support form the Republic for the development of tourism in the interior; - Easily accessible models and experiences in the organization and management of tourist resources; - Regionalization and accession to the European Union. 	<ul style="list-style-type: none"> - Low level of awareness among citizens towards public resources and interests; - Difficulties in agreeing on priorities and the development of tourism; - Poor beginning and experiences with privatization in tourism (long bought edifices are still not converted to tourist purposes).

Based on revenue, tourism is a leading economic activity in the municipalities of Raška and Kuršumljija, while significant revenues are also made by the municipality of Brus, because it possesses the most complete offer of accommodation and restauration capacities in Brzeće. Also present is the impression that little of those revenues goes back to tourism, even though it is the number one economic activity (Office of Revenues Raška Municipality, Office of Revenues Kuršumljija Municipality, 2010).

From tables 1, 2, 3, 4 and 5, it can be concluded that there are a lot of inadequacies and adversities, but there also a lot of advantages and opportunities. A good sign coming from the mountain-spa region to the tourist clientele is that there is a greater number of advantages than disadvantages, and the advantages of higher tourist intensity, and they cover a broader infrastructural, transport and organizational specter. Based on all of the above, the following can be singled out:

Table 6 Main advantages and the most pronounced deficiencies of SWOT analysis

Main Advantages	Most pronounced deficiencies
<ul style="list-style-type: none"> - Geographical position of the Kopaonik-Spa region; - Links with other regions, especially links with the researched spas with spas from the vicinity; - Closeness of international roads E-75, E-80, M-22 and a good regional road network; - Untouched mountain nature, wealth of mineral springs and cultural and historical heritage; - Organic healthy and natural food; - Traditional hospitality of the local population and a positive attitude towards tourism; - Modernization of contents and activities as the basic condition to extending the tourist season on Kopaonik; and, - Intensive increase in contents and activities of spa treatment centers and a continued growth of the tourist visits in the first decade of the XXI century. 	<ul style="list-style-type: none"> - Inadequate usage of the mountain and thermal capabilities of the region (especially in the summer period); - Infrastructural problems, most of the communal type; - Lack of understanding of the complexity of tourism as an important economic activity and priority in its development (example: Kuršumljija Spa); - Current impossibility of correcting or mitigating the effect of the building of the tourist center of Kopaonik at 1,800 m, in the middle of the national park, which currently carries many problems in the preservation and protection of the environment; - Lack of interest for significant investments based on foreign experiences, especially in spas of the region.

Guidelines to using the „advantages and deficiencies“ from the SWOT analysis

In order to improve the existing state of tourism on Kopaonik, Jošanica, Lukovo, Prolom and Kuršumljia spas, the advantages and opportunities should be used, while reducing the inadequacies and deficiencies with a whole range of activities. Some of the activities will be characterized through the following themes:

1. Positive relation of the population towards tourism:
 - Organizing thematic round-tables (with special emphasis on the complementarity of the wider area)
 - Organized interviews in media (with famous people as tourist promoters)
 - Organizing different manifestations which popularize tourism
 - Implementing exemptions and easier obtaining of building and renovation permits (with respect to original regulations about infringement of ambiental environments)
 - Implementing and offering loans and/or subventions for the development of tourism in the private sector.
2. Use of geostrategic position:
 - Modernization of the road network on Kopaonik and especially the spas with appropriate additional road and tourist infrastructure, and
 - Establishment of contact with the appropriate ministries for larger investments
3. Exceptional possibilities for skiing enthusiasts:
 - Extending the ski season thanks to modernization of the ski lifts
 - Placing emphasis on summer tourism (a good example can be seen in the tourist turnover among the mountain places where the first place in both visitors and number of overnight stays is taken by Zlatibor Mountain, thanks to summer tourism)
4. Large potential of thermal waters:
 - Better exploitation of existing springs
 - Better promotion
 - Expanding the offer with additional activities
 - Strengthening the recreational activities in periods with small numbers of tourists and overnight stays
5. Untouched nature:
 - Kopaonik National Park
 - Protection of endemic plant and animal species
 - Education on adopting and implementing ecological regulations
 - Džavolja Varoš, one of the candidates for a new world wonder (this natural phenomenon is 99 km from the Kopaonik tourist center, 10 km from Prolom Spa, and just in 2009, there were over 60,000 tourists that visited it (Tourist Organization of Kuršumljia, 2010))
6. Cultural and historical monuments:
 - Large number of monasteries in the immediate and broader vicinity

- Numerous remains of medieval mining activities
- Significant number of fortifications and fortresses in the Ibar River valley

These short and concise analyses have given a lot of good results all over the world, and have found implementation in many segments of tourist development. If in practice, the given SWOT analysis was to be used, the authors are convinced that it would significantly contribute to better valorization and exploitation of the mountain resources of the Kopaonik region, and a better positioning of the joint (both mountain and spa) tourist products.

Conclusion

Tourism on Kopaonik and the spas of its piedmont has achieved a priority role. This is noticeable in each and every step. What is noticeable is the primarily positive attitude of the local population towards tourism and understanding its complex importance for the entire Kopaonik area. Good geographical, transport and strategic position of this region, unique in Serbia, additionally strengthens the impression which every SWOT analysis, this one included, significantly points out. With the SWOT analysis, many advantages and opportunities in mountain tourism are emphasized, which is in visible expansion in these last few years, but also noticeable are the advantages which characterize spas with very warm water, and a long and rich tradition. On this example, from the SWOT analysis itself it is emphasized that the Kopaonik tourist region has perspective in the future. A strong push in the period of 2006-2011 was done, on Kopaonik first of all, by extending the ski season, and by assembling systems for artificial snow on the trails. Although the small financial funds from the Republic of Serbia have significantly helped in the realization of the project, this practice should continue. Considerably smaller interest for investment in spas, with the existing prerequisites which they already possess, also implies and strengthens the complementary links of the mountain and spa tourism of this region.

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