

deo prvi

AMBICIOZNI PLAN U SUSRET BROJNIM MOGUĆNOSTIMA

Strategija povećanja izvoza Republike Srbije do 2011.godine predstavlja dokument nacionalnog značaja svojom sveobuhvatnošću nudi konkretne instrumente i rokove za ostvarenje svojih ciljeva. Ono što posebno privlači našu pažnju je potenciranje razvoja i povećanja broja **klastera** kao važne karike u lancu podsticanja izvoznih aktivnosti privrede Srbije.

ANALIZA IZVOZNIH TRŽIŠTA

Republika Srbija u proseku plasira 88,2% svog izvoza na tržište Evropske Unije i u zemlje članice CEFTA. Od toga, gotovo polovina izvoza u EU usmerena je na tri zemlje: Italiju, Nemačku i Sloveniju. Sa druge strane, 90% od izvoza u zemlje CEFTA otpada na izvoz u bivše jugoslovenske republike - Bosnu i Hercegovinu, Crnu Goru i Makedoniju.

Zato je jedan od osnovnih zadataka spoljnotrgovinske politike u narednom periodu usmeravanje domaćih preduzeća na nova tržišta.

Ulazak srpskih preduzeća na nova tržišta biće ostvaren u dva pravca, a u skladu sa ciljem Strategije da se ostvari optimalna geografska diversifikacija izvoza osvajanjem novih tržišta:

1. tržišta sa velikim potencijalom rasta i/ili velike kupovne moći, i/ili
2. tržišta koja su bila tradicionalni partneri bivše SFRJ, odnosno zemlje sa kojima je Srbija u okviru bivše SFRJ imala izuzetno razvijenu spoljnotrgovinsku saradnju.

Prema potencijalu rasta, tj. privrednom rastu, sva tržišta možemo podeliti na brzorastuća (preko 5,5% prosečan rast BDP-a), umerenorastuća (od 3-5,5%) i spororastuća (ispod 3%). Sa druge strane, prema veličini tržišta možemo podeliti na velika (BDP preko 330 milijardi dolara), srednja (BDP između 45 i 330 milijardi dolara) i mala (BDP ispod 45 milijardi dolara).

Klasifikacija izvoznih tržišta prema veličini i rastu

	Velika	Srednja	Mala
	Kina	Iran	Belorusija
	Rusija	Irska	Bugarska
	Indija	Argentina	Litvanija
	Turska	Rumunija	Turkmenistan
		Nigerija	Letonija
		Ukrajina	Azerbejdžan
		Kazakstan	Uzbekistan
		Slovačka	Estonija
		Libija	Jermenija
		Angola	Moldavija
		UAE	Mongolija
			Tadžikistan
			Jordan
	Španija	Grčka	Hrvatska
	Brazil	Južna Afrika	Slovenija
	Južna Koreja	Finska	Tunis
	Australija	Češka	Kipar
	Indonezija	Izrael	Bosna i Hercegovina
	Poljska	Alžir	Albanija
	Saudijska Arabija	Mađarska	Gruzija

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		Kipar	
		Maroko	
	SAD	Austrija	Malta
	Japan	Danska	Makedonija
	Nemačka	Portugal	
S	Velika Britanija		
P	Francuska		
o	Italija		
r	Kanada		
o	Meksiko		
r	Holandija		
a	Švajcarska		
s	Švedska		
t	Norveška		
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Izvor: Republički zavod za statistiku, MMF

Uzimajući u obzir prosečne stope rasta zemalja u deceniji za nama, kao i tradiciju spoljnotrgovinske razmene sa Republikom Srbijom reprezentativne 1987. godine, možemo identifikovati nekoliko potencijalnih novih tržišta za srpske proizvode.

	Potencijalna (tradicionalna) tržišta					
	Prosečne stope rasta	Broj stanovnika, u mil.	BDP, mlrd dolara	BDP po stanovniku	Tradicija, razmena 1987*	Režim spoljne trgovine/problemi u saradnji
Angola	13.8	11.2	45.167	4,032.8	Relativno visoka	

Kina	9.9	1,306.3	2,644.6	2,024.5	Relativno visoka	Neregulisan dug
Kazakstan	9.9	15.2	81.0	5,329.1	Kroz bivši SSSR	Pregovori o Sporazumu o slobodnoj trgovini (SST)
Belorusija	7.5	9.8	36.9	3,769.8	Kroz bivši SSSR	Pregovori o SST
Indija	7.2	1,080.3	873.7	808.7	Relativno visoka	
Ukrajina	7.1	47.4	106.5	2,246.2	Kroz bivši SSSR	Pregovori o SST
Rusija	6.8	142.8	984.9	6,897.2	Vrlo visoka	SST
Nigerija	5.8	128.8	116.5	904.4		
Moldavija	5.7	4.5	3.4	745.8	Kroz bivši SSSR	Članica CEFTA
Iran	5.5	68.0	222.4	3,270.4	Visoka	
Libija	5.5	5.8	50.4	8,697.4	Relativno visoka	
Indonezija	5.2	242.0	364.2	1,505.1		
Turska	5.1	72.1	401.8	5,572.3	Relativno visoka	Pregovori o SST
Egipat	5.0	77.5	107.4	1,385.5	Visoka	
Alžir	4.5	32.5	113.9	3,504.2	Relativno visoka	
Češka	4.4	10.2	142.5	13,972.3	Vrlo visoka	Članica EU
Poljska	4.2	38.6	341.0	8,833.4	Vrlo visoka	Članica EU
Irak		26.1			Vrlo visoka	

Prosek/Ukupno 6.6 3,319.1 4,323.5

* Tradicija je merena preko spoljnotrgovinske razmene 1987. godine

Ukoliko razmena zauzima 1-10. mesto ocena je VRLO VISOKA TRADICIJA

Ukoliko razmena zauzima 10-20. mesto ocena je VISOKA TRADICIJA

Ukoliko razmena zauzima 20-30. mesto ocena je RELATIVNO VISOKA TRADICIJA

Na osnovu prethodne analize i anketa izvoznika o potencijalnim tržištima, možemo izdvojiti četiri ključna izvozna tržišta za Srbiju. To su:

- Evropska Unija;
- CEFTA;
- Zajednica Nezavisnih Država (ZND);
- Bliski i Srednji Istok i Severna Afrika (BSISA)

Specifični ciljevi Strategije povećanja izvoza u periodu do 2011. godine za ova tržišta su sledeći:

- održati visoke stope rasta izvoza na tržištima EU i CEFTA od 20-25% prosečno godišnje;
- ostvariti stope rasta izvoza u region ZND od 30% prosečno godišnje do 2011. godine;
- ostvariti stope rasta izvoza u region BSISA od 40% prosečno godišnje do 2011. godine.

Evropska Unija (EU)

Evropska unija je tradicionalno najznačajnije srpsko izvozno tržište (oko 56% ukupnog izvoza). Sa tržištem od 497,2 miliona stanovnika i neponderisanom stopom rasta od 3,9% (što je nešto ispod prosečnog rasta svetske privrede od 4,4%) i pozitivnim izgledima u pogledu daljeg rasta (naročito novih članica), EU će i u budućnosti predstavljati ključno izvozno tržište za srpske proizvode. To potvrđuje i činjenica da blizu trećine srpskih izvoznika planira u narednom periodu povećanje izvoza u EU.

PRIMER - prikaz iz druge polovine prošle decenije -
spoljnotrgovinska razmena Republike Srbije sa EU,
u mln evra

	2006			2007			Stope rasta		
	Izvoz	Uvoz	Saldo	Izvoz	Uvoz	Saldo	Izvoz	Uvoz	Saldo
Italija	741.2	979.5	-238.3	799.5	1,292.8	-493.3	7.9	32.0	107.0

Nemačka	523.7	1,145.5	-621.7	684.0	1,577.3	-893.3	30.6	37.7	43.7
Slovenija	201.0	378.0	-177.1	298.3	508.1	-209.9	48.4	34.4	18.5
Austrija	152.3	333.3	-181.0	220.3	438.4	-218.2	44.6	31.5	20.5
Francuska	187.5	314.7	-127.1	212.2	417.4	-205.2	13.2	32.7	61.4
Rumunija	139.7	356.6	-217.0	193.4	310.1	-116.7	38.5	-13.0	-46.2
Mađarska	149.6	339.5	-189.9	181.2	518.4	-337.2	21.1	52.7	77.6
Bugarska	122.5	343.2	-220.7	159.3	419.2	-259.9	30.1	22.2	17.8
Grčka	121.8	184.6	-62.8	133.0	202.8	-69.8	9.2	9.9	11.2
Velika Britanija	106.3	130.1	-23.8	109.9	150.4	-40.5	3.4	15.6	70.5
Holandija	83.9	145.1	-61.2	109.6	197.0	-87.4	30.6	35.8	42.9
Poljska	60.1	195.6	-135.6	98.9	182.2	-83.3	64.7	-6.8	-38.6
Češka	73.0	199.8	-126.8	87.5	222.2	-134.7	19.9	11.2	6.3
Slovačka	35.3	123.0	-87.7	80.9	225.0	-144.1	129.2	82.9	64.2
Belgija	68.6	115.5	-47.0	72.0	160.1	-88.1	5.0	38.6	87.5
Španija	51.4	100.0	-48.6	45.5	121.7	-76.2	-11.4	21.8	56.9
Švedska	26.0	140.5	-114.6	32.9	201.6	-168.6	26.9	43.5	47.2
Kipar	43.9	25.3	18.6	26.3	7.7	18.6	-40.1	-69.8	0.2
Portugal	6.7	6.4	0.3	17.4	7.1	10.3	159.2	11.1	3,311.6
Letonija	3.7	0.6	3.1	10.6	0.7	9.9	185.5	11.4	221.1
Danska	9.1	46.6	-37.5	9.5	58.1	-48.6	5.1	24.8	29.6
Finska	4.4	30.4	-26.0	7.3	55.3	-47.9	68.3	81.8	84.0

Litvanija	13.9	3.4	10.5	5.3	4.1	1.2	-62.0	19.5	-88.4
Irska	2.9	51.3	-48.3	4.5	63.0	-58.4	53.8	22.8	20.9
Estonija	2.0	2.6	-0.6	2.5	3.4	-0.9	21.6	29.3	57.1
Luksemburg	0.4	3.6	-3.2	0.3	6.4	-6.1	-12.2	77.7	87.4
Malta	0.6	0.3	0.3	0.1	0.5	-0.5	-88.9	82.1	-230.9
Ukupno EU	2,931.5	5,695.0	-2,763.5	3,602.2	7,350.9	-3,748.6	22.9	29.1	35.6
Ukupan sve zemlje	5,102.5	10,462.5	-5,360.1	6,432.6	13,345.5	-6,912.9	26.1	27.6	29.0
Učešće EU	57.5	54.4	51.6	56.0	55.1	54.2			

Izvor: Republički zavod za statistiku

Tržište EU je za izvoznike iz Republike Srbije značajno zbog povoljnog tretmana koji omogućava izvoz velikog broja proizvoda bez carine, uključujući i veliki broj proizvoda koji se izvoze pod preferencijalnim statusom. Potpisivanjem i primenom Sporazuma o stabilizaciji i pridruživanju, svi naši proizvodi su oslobođeni carine prema zemljama EU.

CEFTA

Prema učešću u ukupnom izvozu Republike Srbije od 32,2% tržište CEFTA je drugo po značaju. Ovo tržište je značajno za privredu Republike Srbije zbog činjenice da na ovom tržištu Srbija ostvaruje kontinuirani suficit od oko 978,9 miliona evra, sa tendencijom rasta. Rast izvoza na ovo tržište je značajno viši od rasta ukupnog izvoza (33,4% naspram 26,1%). Sa druge strane, uvoz je rastao 27,6% , što je na nivou rasta ukupnog uvoza. Oko 22% srpskih izvoznika planira u narednom periodu da poveća izvoz u CEFTA region.

CEFTA inače, pored Srbije, uključuje Albaniju, Bosnu i Hercegovinu, Makedoniju, Moldaviju, Hrvatsku i Crnu Goru.

PRIMER – prikaz iz druge polovine prošle dedenije -

spoljnotrgovinska razmena Srbije sa zemljama članicama CEFTA, u mln evra

	2006			2007			Stope rasta		
	Izvoz	Uvoz	Saldo	Izvoz	Uvoz	Saldo	Izvoz	Uvoz	Saldo
Albanija	26.5	3.7	22.8	58.5	8.3	50.1	120.6	124.5	119.9

BiH	593.9	275.4	318.5	759.4	375.4	384.0	27.9	36.3	20.6
Makedonija	238.0	160.1	77.9	318.1	219.5	98.5	33.6	37.1	26.4
Moldavija	3.1	6.3	-3.2	3.4	8.5	-5.1	9.5	35.0	59.5
Hrvatska	199.4	290.3	-90.9	240.9	385.2	-144.3	20.8	32.7	58.7
Crna Gora	491.7	120.9	370.8	691.8	96.2	595.6	40.7	-20.5	60.6
Ukupno CEFTA	1,5516	856.7	695.9	2,071.9	1,093.1	978.9	33.4	27.6	40.7
Ukupan sve zemlje	5,102.5	10,462.5	-5,360.1	6,432.6	13,345.5	-6,912.9	26.1	27.6	29.0
Učešće CEFTA	30.4	8.2		32.2	8.2				

Izvor: Republički zavod za statistiku

Potencijali tržišta zemalja koje su članice CEFTA su značajni:

- u prethodnoj deceniji ostvarene su visoke stope rasta BDP od 4,7% prosečno godišnje;
- jasne su perspektive u pogledu daljeg rasta kao posledice napretka u evropskim integracijama;
- tržište CEFTA je veoma interesantno, a njegove dodatne prednosti su blizina i poznavanje poslovne kulture i preferencija potrošača;
- mogućnost oslobađanja od carina za izvoz proizvoda za čiju proizvodnju je korišćeno 70% sirovina iz CEFTA regiona ili EU.

Zajednica Nezavisnih Država (ZND)

Zajednica Nezavisnih Država je veoma značajno potencijalno tržište za Republiku Srbiju. To potvrđuje i veliki interes srpskih firmi, pre svega za rusko i ukrajinsko tržište (oko 20% preduzeća planira da poveća izvoz u ove dve zemlje u narednom periodu). Učešće izvoza na ova tržišta u ukupnom izvozu iznosi 7,0%, ali je rast izvoza na ova tržišta manji u odnosu na rast ukupnog izvoza (23,8% naspram 26,1%). U spoljnotrgovinskoj razmeni sa ovim zemljama, Republika Srbija ostvaruje visok deficit od 1.681,4 miliona evra, što čini trećinu ukupno ostvarenog spoljnotrgovinskog deficita, a to je direktna posledica uvoza energenata iz ovog regiona, prvenstveno iz Rusije.

Zajednica Nezavisnih Država inače uključuje Rusiju, Jermeniju, Azerbejdžan, Belorusiju, Gruziju, Kazakstan, Kirgistan, Tadžikistan, Turkmenistan, Ukrajinu, Uzbekistan i Moldaviju. Kako je Moldavija uključena u CEFTA ova zemlja nije uzeta u obzir prilikom analize ZND.

PRIMER – prikaz iz druge polovine prošle decenije -
 spoljnotrgovinska razmena Srbije sa zemljama ZND, u mln evra

	2006			2007			Stope rasta		
	Izvoz	Uvoz	Saldo	Izvoz	Uvoz	Saldo	Izvoz	Uvoz	Saldo
Rusija	246.9	1,706.7	-1,459.8	326.0	1,911.4	-1,585.4	32.0	12.0	8.6
Jermenija	0.6	2.5	-1.9	1.7	0.0	1.7	178.8	-98.8	-190.7
Azerbejdžan	1.0	0.9	0.1	1.0	2.0	-1.0	1.3	124.9	-1,105.2
Belorusija	11.9	16.0	4.1	9.4	25.5	-16.0	-21.0	58.9	291.3
Gruzija	1.1	40.2	-39.1	0.8	4.0	-3.1	-26.0	-90.1	-92.0
Kazakstan	4.3	39.5	-35.2	8.2	55.0	-46.8	93.4	39.3	32.8
Kirgistan	0.0	1.5	-1.4	0.1	4.0	-3.9	20.4	169.4	174.5
Tadžikistan	0.0	3.6	-3.6	2.9	0.3	2.6	5,828.6	-92.9	-173.8
Turkmenistan	0.3	5.8	-5.4	2.3	20.9	-18.6	556.1	261.3	242.6
Ukrajina	97.8	229.4	-131.6	97.7	274.2	-176.5	-0.1	19.5	34.1
Uzbekistan	0.8	0.1	0.7	1.6	1.0	0.6	94.0	771.3	-13.4
Ukupno ZND	364.9	2,046.2	-1,681.4	451.8	2,298.2	-1,846.4	23.8	12.3	9.8
Ukupno sve zemlje	5,102.5	10,462.5	-5,360.1	6,432.6	13,345.5	-6,912.9	26.1	27.6	29.0
Učešće ZND	7.2	19.6	31.4	7.0	17.2	26.7			

Izvor: Republički zavod za statistiku

Potencijal tržišta zemalja Zajednice Nezavisnih Država je veliki:

- rast BDP u prethodnom periodu iznosio 9,1% prosečno godišnje, sa velikim izgledima za nastavak tako visokog rasta i u narednom periodu;
- ukupan broj stanovnika na ovom tržištu je 273,7 miliona;
- Republika Srbija tradicionalno ima dobre političke i ekonomske odnose sa ovim zemljama

(kroz saradnju sa bivšim SSSR);

- potpisan Sporazum o slobodnoj trgovini sa Ruskom Federacijom, a u toku su pregovori za potpisivanje SST sa Belorusijom;
- struktura srpskog izvoza je takva da bi mogla da bude konkurentna na ovim tržištima u pojedinim segmentima;
- ključne zemlje iz regiona: Rusija, Ukrajina, Belorusija i Kazakstan.

Region Bliskog i Srednjeg Istoka i Severne Afrike (BSISA)

Region Bliskog i Srednjeg Istoka i Severne Afrike imao je značajno učešće u spoljnotrgovinskoj razmeni u sedamdesetim i osamdesetim godinama prošlog veka. Učešće srpskog izvoza u ovaj region je oko 1,8%, ali uz snažan rast od 40,4% koji znatno prevazilazi ukupan rast izvoza. Ovaj region inače obuhvata: Egipat, Libiju, Maroko, Angolu, Tunis, Tursku, Iran, Izrael, Jordan, Kuvajt, Liban, Oman, Katar, Saudijsku Arabiju, Siriju i Ujedinjene Arapske Emirate.

PRIMER – prikaz iz druge polovine prošle decenije -
spoljnotrgovinska razmena Republike Srbije sa zemljama BSISA, u mln evra

	2006			2007			Stope rasta		
	Izvoz	Uvoz	Saldo	Izvoz	Uvoz	Saldo	Izvoz	Uvoz	Saldo
Turska	30.7	204.0	-173.2	42.2	284.2	-242.0	37.6	39.4	39.7
Egipat	13.6	7.2	6.4	14.8	9.8	5.0	8.9	36.1	-21.5
Izrael	13.2	23.7	-10.6	12.0	26.8	-14.8	-8.6	13.1	40.1
Iran	6.5	3.0	3.6	11.7	4.8	6.8	78.1	61.9	91.6
UAE	5.6	2.0	3.6	10.7	2.2	8.4	90.2	12.5	132.7
Sirija	7.2	4.7	2.5	7.9	6.4	1.4	8.7	37.1	-43.7
Jordan	0.9	0.1	0.8	6.9	0.2	6.7	652.8	67.8	738.7
Saudijska Arabija	1.6	1.9	-0.3	5.8	2.0	3.7	263.1	9.5	-1,457.3
Alžir	5.6	0.1	5.5	5.2	0.0	5.1	-7.5	-66.1	-6.3

Libija	2.7	0.5	2.2	3.6	1.5	2.0	31.5	184.2	-6.6
Maroko	1.8	5.9	-4.1	3.6	11.1	-7.6	99.0	87.2	82.1
Tunis	0.5	2.6	-2.1	2.6	7.7	-5.1	422.1	201.8	147.3
Liban	0.9	0.0	0.8	2.0	0.2	1.8	125.5	345.9	115.8
Kuvajt	0.8	0.8	-0.1	0.7	0.4	0.3	-7.8	-49.1	-582.0
Angola	0.8	0.1	0.7	0.4	0.1	0.2	-49.5	63.6	-64.1
Katar	0.2	2.3	-2.1	0.1	4.1	-4.1	-69.8	81.5	97.0
Oman	0.0	0.8	-0.8	0.0	2.5	-2.5	-93.6	210.9	229.6
Ukupno BSISA	92.7	259.7	-167.0	130.1	364.4	-234.3	40.4	40.3	40.3
Ukupan sve zemlje	5,102.5	10,462.5	-5,360.1	6,432.6	13,345.5	-6,912.9	26.1	27.6	29.0
Učešće BSISA	1.8	2.5	3.1	2.0	2.7	3.4			

Izvor: Republički zavod za statistiku

Potencijali ovih tržišta su:

- rast BDP u prethodnom periodu je iznosio 5,7% prosečno godišnje, sa velikim izgledima za nastavak tako visokog rasta i u narednom periodu;
- ukupan broj stanovnika na ovom tržištu je 388,2 miliona;
- Republika Srbija tradicionalno ima dobre političke i ekonomske odnose sa određenim zemljama ovog regiona;
- struktura srpskog izvoza je takva da bi mogla da bude konkurentna na ovim tržištima u pojedinim segmentima;
- ključne zemlje iz regiona su: Turska, Egipat, Izrael, Iran, Libija i Jordan.

SWOT ANALIZA

SWOT analiza daje prikaz prednosti, slabosti, šansi i pretnji za ostvarenje visokih stopa rasta izvoza Republike Srbije. Ona omogućava prepoznavanje pozitivnih i negativnih faktora koji utiču na ostvarenje opredeljenja i uspostavlja ravnotežu između internih sposobnosti i eksternih mogućnosti.

SWOT analiza za ostvarenje visokih stopa rasta izvoza Republike Srbije

Prednosti:

- Jaka sirovinaska osnova kod određenih grupa proizvoda (osnovni metali, gvožđe i čelik, drvo, prehrambena industrija)
- Geografski položaj (Koridor VII i X)
- Visok privredni rast od 2000. godine
- Potencijali za razvoj ljudskog kapitala
- Dinamičan MSP sektor

Nedostaci:

- Nedovoljan broj krupnih privrednih sistema koji obezbeđuju veliki izvoz
- Slab imidž Srbije u svetu
- Nedovoljne investicije u izvozni sektor
- Nepovoljna struktura izvoza
- Visoko učešće proizvoda niže faze prerade
- Visoki troškovi finansiranja izvoznih poslova
- Visok politički rizik zemlje
- Zaostajanje za uspešnim tranzicionim zemljama

Šanse:

- Sporazum o slobodnoj trgovini sa Ruskom Federacijom
- CEFTA sporazum
- Tradicionalno dobri odnosi sa

Opasnosti:

- Moguće usporavanja svetske privrede (SAD i EU)
- Jačanje konkurencije iz okruženja
- Zaostajanje u evropskim

tržištima bivše integracijama
SFRJ - Politička
- Mogući rast nestabilnost
svetske - Kašnjenje za
privrede, velikim
naročito nacionalnim
zemalja infrastrukturnim
regiona projektima
- Pogoršanje
odnosa razmene

CILJEVI STRATEGIJE

Osnovni ciljevi Strategije povećanja izvoza u periodu do 2011. godine su:

- rast izvoza robe i usluga od 25% prosečno godišnje do 2011. godine;
- promena strukture izvoza od dominacije proizvoda niže faze prerade ka dominaciji proizvoda više faze prerade (veće učešće izvoza proizvoda sa višom dodatom vrednošću) - povećano učešće kapitalnih i potrošnih dobara u ukupnom izvozu sa 43,2% u 2007. godini na 65% u 2011. godini;
- optimalna geografska diversifikacija izvoza osvajanjem novih tržišta;
- povećan broj preduzeća koja izvoze preko 10 miliona evra godišnje sa 66 u 2007. godini na 120 do 2011. godine.

Prema projekciji makroekonomskih kretanja zaključno sa 2011. godinom, uz ostvarenje ciljeva definisanih strategijom, spoljnotrgovinski deficit (saldo robne razmene) će se smanjiti sa 21,5% na 15,8% BDP, uz smanjenje deficita tekućeg računa bez donacija sa 17,5% na 12,1%, čime će se obezbediti makroekonomska stabilnost. Neophodni uslovi za ostvarenje projekcija je priliv stranih direktnih investicija od tri milijarde evra godišnje, rast BDP od oko 6,3% prosečno godišnje i rast učešća investicija u osnovna sredstva u BDP sa 21,6% (procena) u 2007. na približno 25% u 2011. godini.

PRINCIPI STRATEGIJE

Osnovni principi Strategije su:

- saradnja sektora privrede i države sa jasno definisanim nadležnostima, odgovornostima i zadacima u pogledu formulisanja i primene strategije;
- formulisanje sistema podrške izvozu u skladu sa dinamikom priključenja Svetskoj trgovinskoj organizaciji i Evropskoj uniji (očekivano 2014. godine).

Strategija se bazira na dva osnovna stuba:

- jačanje kapaciteta malih i srednjih preduzeća (pre svega srednjih preduzeća) za izvoz;
- uspostavljanje sistema podsticaja za priliv stranih direktnih investicija koje su izvozno orjentisane.

kraj prvog dela

- REPUBLIC OF SERBIA EXPORT INCREASE STRATEGY TILL 2011 -
("Republic of Serbia Official Gazette " nr.58/ 2008)

Part one

Ambitious Plan for Numerous Possibilities

Republic of Serbia Export Increase Strategy till 2011 is a document of national importance offering actual instruments and deadlines for fulfilling its objectives. It especially stresses the development and increase of number of **clusters** as important parts of the Serbian economy export activities incentives chain.

EXPORT MARKETS ANALYSIS

Republic of Serbia sells the average of 88.2% of its total export to EU countries and CEFTA members. Almost half of that is directed towards three countries: Italy, Germany and Slovenia. On the other hand, 90% of export to CEFTA countries is in the former Yugoslav republics of Bosnia and Herzegovina, Montenegro and FYROM.

That is why one of the basic tasks of the foreign trade policy in the future period is trying to connect the domestic companies with new markets.

Break through of Serbian companies to new markets will be done in two directions, according to Strategy objective to provide the optimal geographic diversification of export through conquering the new markets:

3. Markets with high growth potentials and/or large buying abilities and/or
4. Markets that used to be traditional partners of the former SFRY, or countries with which Serbia, as a part of ex-SFRY had well-developed foreign trade cooperation.

According to growth potential, i.e. economy growth, all the markets can be divided into fast growing (more than 5.5% average growth GDP), moderate growing (3-5,5%) and slow growing (less than 3%). On the other hand, according to market size they can be big (GDP more than 330 billion dollar), medium (GDP between 45 and 330 billion \$) and small (GDP less than 45 billion \$).

Classification of the export markets according to size and growth

	Big	Medium	Small
F a s t g r o w i n g	China	Iran	Belarus
	Russia	Ireland	Bulgaria
	India	Argentina	Lithuania
	T u r k y	Rumania	Turkmenistan
		Nigeria	Latvia
		Ukraine	Azerbaijan
		Kazakhstan	Uzbekistan
		Slovakia	Estonia
		Libya	Armenia
		Angola	Moldova
M o	UAE	Mongolia	
		Tajikistan	
		Jordan	
	Spain	Greece	Croatia

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Brazil	South Africa	Slovenia
South Korea	Finland	Tunisia
Australia	Czech Republic	Cyprus
Indonesia	Israel	Bosnia and Herzegovina
Poland	Algeria	Albania
Saudi Arabia	Hungary	Georgia
	Cyprus	
	Morocco	
USA	Austria	Malta
Japan	Denmark	FYROM
Germany	Portugal	

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Great Britain
France
Italy
Canada
Mexico
Netherlands
Switzerland
Sweden
Norway

Source: Republic Institute for Statistics, IMF

Having in mind the average growth rates of countries in the past decade, as well as foreign trade

exchange tradition with Republic of Serbia in 1987, several new markets for Serbian products can be identified.

	Potential (traditional) markets					
	Average growth rate	Population in millions	GDP, billion dollar	GDP per capita	Tradition, exchange 1987*	Foreign trade regime/problems in cooperation
Angola	13.8	11.2	45.167	4,032.8	Relatively high	
Kina	9.9	1,306.3	2,644.6	2,024.5	Relatively high	Debt not settled
Kazakhstan	9.9	15.2	81.0	5,329.1	Through former USSR	Negotiations on Free Trade Agreement (FTA)
Belarus	7.5	9.8	36.9	3,769.8	Through former USSR	Negotiations on FTA
India	7.2	1,080.3	873.7	808.7	Relatively high	
Ukraine	7.1	47.4	106.5	2,246.2	Through former USSR	Negotiations on FTA
Russia	6.8	142.8	984.9	6,897.2	Very high	SST
Nigeria	5.8	128.8	116.5	904.4		
Moldova	5.7	4.5	3.4	745.8	Through former USSR	CEFTA member
Iran	5.5	68.0	222.4	3,270.4	High	
Libya	5.5	5.8	50.4	8,697.4	Relatively high	
Indonesia	5.2	242.0	364.2	1,505.1		
Turkey	5.1	72.1	401.8	5,572.3	Relatively high	Negotiations on FTA

Egypt	5.0	77.5	107.4	1,385.5	High	
Algeria	4.5	32.5	113.9	3,504.2	Relatively high	
Czech Republic	4.4	10.2	142.5	13,972.3	Very high	EU member
Poland	4.2	38.6	341.0	8,833.4	Very high	EU member
Iraq		26.1			Very high	
Average/Total	6.6	3,319.1		4,323.5		

* Tradition measured by the foreign trade exchange in 1987

If the trade is between places 1 and 10, it is rated as VERY HIGH TRADITION

If the trade is between places 10 and 20, it is rated as HIGH TRADITION

If the trade is between places 20 and 30, it is rated as RELATIVELY HIGH TRADITION

Based on the previous analysis and questionnaires of exporters on potential markets, there are four key markets for Serbia, and they are:

- EU;
- CEFTA;
- Community of Independent States (CIS);
- Near and Middle East and North Africa (BSISA)

Specific goals of Republic of Serbia Export Increase Strategy till 2011 for these markets are:

- Maintain high growth rates of export to EU and CEFTA of 20-25% average per year;
- Establish growth rates of export to CIS region of 30% average per year till 2011;
- Establish growth rates of export to BSISA region of 40% average per year till 2011.

European Union (EU)

European Union has traditionally been the most significant Serbian export market (about 56% of total export). With 497.2 million people and growth rate of 3.9% (a bit lower than world average growth of 4.4%) and positive tendencies of further growth (especially of the new members), EU will represent the key export market for Serbian products in future as well. This is confirmed by the fact that nearly one third of Serbian exporters plan to increase export into EU in the near future.

EXAMPLE- from the second half of the past decade -
Foreign trade exchange of Republic of Serbia with EU,
in million euro

	2006			2007			Growth rates		
	Export	Import	Difference	Export	Import	Difference	Export	Import	Difference
Italy	741.2	979.5	-238.3	799.5	1,292.8	-493.3	7.9	32.0	107.0
Germany	523.7	1,145.5	-621.7	684.0	1,577.3	-893.3	30.6	37.7	43.7
Slovenia	201.0	378.0	-177.1	298.3	508.1	-209.9	48.4	34.4	18.5
Austria	152.3	333.3	-181.0	220.3	438.4	-218.2	44.6	31.5	20.5
France	187.5	314.7	-127.1	212.2	417.4	-205.2	13.2	32.7	61.4
Rumania	139.7	356.6	-217.0	193.4	310.1	-116.7	38.5	-13.0	-46.2
Hungary	149.6	339.5	-189.9	181.2	518.4	-337.2	21.1	52.7	77.6
Bulgaria	122.5	343.2	-220.7	159.3	419.2	-259.9	30.1	22.2	17.8
Greece	121.8	184.6	-62.8	133.0	202.8	-69.8	9.2	9.9	11.2
Great Britain	106.3	130.1	-23.8	109.9	150.4	-40.5	3.4	15.6	70.5
Netherlands	83.9	145.1	-61.2	109.6	197.0	-87.4	30.6	35.8	42.9
Poland	60.1	195.6	-135.6	98.9	182.2	-83.3	64.7	-6.8	-38.6
Czech Republic	73.0	199.8	-126.8	87.5	222.2	-134.7	19.9	11.2	6.3
Slovakia	35.3	123.0	-87.7	80.9	225.0	-144.1	129.2	82.9	64.2
Belgium	68.6	115.5	-47.0	72.0	160.1	-88.1	5.0	38.6	87.5
Spain	51.4	100.0	-48.6	45.5	121.7	-76.2	-11.4	21.8	56.9

Sweden	26.0	140.5	-114.6	32.9	201.6	-168.6	26.9	43.5	47.2
Cyprus	43.9	25.3	18.6	26.3	7.7	18.6	-40.1	-69.8	0.2
Portugal	6.7	6.4	0.3	17.4	7.1	10.3	159.2	11.1	3,311.6
Latvia	3.7	0.6	3.1	10.6	0.7	9.9	185.5	11.4	221.1
Denmark	9.1	46.6	-37.5	9.5	58.1	-48.6	5.1	24.8	29.6
Finland	4.4	30.4	-26.0	7.3	55.3	-47.9	68.3	81.8	84.0
Lithuania	13.9	3.4	10.5	5.3	4.1	1.2	-62.0	19.5	-88.4
Ireland	2.9	51.3	-48.3	4.5	63.0	-58.4	53.8	22.8	20.9
Estonia	2.0	2.6	-0.6	2.5	3.4	-0.9	21.6	29.3	57.1
Luxemburg	0.4	3.6	-3.2	0.3	6.4	-6.1	-12.2	77.7	87.4
Malta	0.6	0.3	0.3	0.1	0.5	-0.5	-88.9	82.1	-230.9
Total EU	2,931.5	5,695.0	-2,763.5	3,602.2	7,350.9	-3,748.6	22.9	29.1	35.6
Total all countries	5,102.5	10,462.5	-5,360.1	6,432.6	13,345.5	-6,912.9	26.1	27.6	29.0
EU participation	57.5	54.4	51.6	56.0	55.1	54.2			

Source: Republic Institute for Statistics

EU market is significant for Serbian exporters because of the positive treatment making the export of the large number of products without customs possible, including a large number of products exported under preferential status. By signing and application of the Agreement on Stabilization and Joining all our products are exempt from customs of EU countries.

CEFTA

With 32.2% of the total Republic of Serbia export, CEFTA market is the second most important. It is important for the Serbian economy due to the fact that Serbia has continuous surplus of about 978.9 million euro, with tendency to grow. Growth of export to this market is significantly higher than total export growth (33.4% compared to 26.1%). On the other hand, import was growing for 27.6%, which is at the level of total import growth. About 22% of Serbian exporters are planning to increase export to CEFTA region in the near future.

Apart from Serbia, CEFTA includes Albania, Bosnia and Herzegovina, FYROM, Moldova, Croatia and Montenegro.

EXAMPLE- from the second half of the past decade –
Foreign trade exchange of Republic of Serbia with CEFTA,
in million Euro

	2006			2007			Growth rates		
	Export	Import	Difference	Export	Import	Difference	Export	Import	Difference
Albania	26.5	3.7	22.8	58.5	8.3	50.1	120.6	124.5	119.9
B and H	593.9	275.4	318.5	759.4	375.4	384.0	27.9	36.3	20.6
FYROM	238.0	160.1	77.9	318.1	219.5	98.5	33.6	37.1	26.4
Moldova	3.1	6.3	-3.2	3.4	8.5	-5.1	9.5	35.0	59.5
Croatia	199.4	290.3	-90.9	240.9	385.2	-144.3	20.8	32.7	58.7
Montenegro	491.7	120.9	370.8	691.8	96.2	595.6	40.7	-20.5	60.6
Total CEFTA	1,551.6	856.7	695.9	2,071.9	1,093.1	978.9	33.4	27.6	40.7
Total all countries	5,102.5	10,462.5	-5,360.1	6,432.6	13,345.5	-6,912.9	26.1	27.6	29.0
CEFTA participation	30.4	8.2		32.2	8.2				

Source: Republic Institute for Statistics

CEFTA members market potentials are significant because:

- During the previous decade high rates of GDP growth of 4.7% average per year have been established;
- There are clear perspectives of further growth as a consequence of progress in European integrations;
- CEFTA market is very interesting, and its additional advantages are that they are close and that business cultures and consumers preferences are well-known;
- Possibility of customs tax exemption for export of products for production of which 70%

raw materials from CEFTA region or EU was used.

Community of Independent States (CIS)

Community of Independent States is a very interesting potential market for Republic of Serbia, as confirmed by a high interest of Serbian Companies for Russian and Ukrainian markets (about 20% of companies plan to increase export to these two countries in the near future). Export to these markets is 7.0% of the total, but growth of export to these markets is lower than the growth of the total export (23.8% compared to 26.1%). In foreign trade with these countries, Republic of Serbia has a high deficit of 1,681.4 million euro that makes the third of the total foreign trade deficit, as a direct consequence of import of fuels and gas from this region, especially Russia.

Community of Independent States consists of Russia, Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Ukraine, Uzbekistan and Moldavia. As Moldova is a member of CEFTA, this country was not considered in CIS analysis.

EXAMPLE- from the second half of the past decade –
Foreign trade exchange of Republic of Serbia with CIS,
in million euro

	2006			2007			Growth rates		
	Export	Import	Difference	Export	Import	Difference	Export	Import	Difference
Russia	246.9	1,706.7	-1,459.8	326.0	1,911.4	-1,585.4	32.0	12.0	8.6
Armenia	0.6	2.5	-1.9	1.7	0.0	1.7	178.8	-98.8	-190.7
Azerbaijan	1.0	0.9	0.1	1.0	2.0	-1.0	1.3	124.9	-1,105.2
Belarus	11.9	16.0	4.1	9.4	25.5	-16.0	-21.0	58.9	291.3
Georgia	1.1	40.2	-39.1	0.8	4.0	-3.1	-26.0	-90.1	-92.0
Kazakhstan	4.3	39.5	-35.2	8.2	55.0	-46.8	93.4	39.3	32.8
Kyrgyzstan	0.0	1.5	-1.4	0.1	4.0	-3.9	20.4	169.4	174.5
Tajikistan	0.0	3.6	-3.6	2.9	0.3	2.6	5,828.6	-92.9	-173.8
Turkmenistan	0.3	5.8	-5.4	2.3	20.9	-18.6	556.1	261.3	242.6
Ukraine	97.8	229.4	-131.6	97.7	274.2	-176.5	-0.1	19.5	34.1

Uzbekistan	0.8	0.1	0.7	1.6	1.0	0.6	94.0	771.3	-13.4
Total CIS	364.9	2,046.2	-1,681.4	451.8	2,298.2	-1,846.4	23.8	12.3	9.8
Total countries	all 5,102.5	10,462.5	-5,360.1	6,432.6	13,345.5	-6,912.9	26.1	27.6	29.0
CIS participation	7.2	19.6	31.4	7.0	17.2	26.7			

Source: Republic Institute for Statistics

Community of Independent States potential is big:

- GDP growth in the previous period was averagely 9.1% per year, with high tendencies to continue such a high growth in future as well;
- Total population number on this market is 273.7 million;
- Republic of Serbia has traditionally good political and economic relations with these countries (through cooperation with ex-USSR);
- Signed Free Trade Agreement with Russian Federation, and ongoing negotiations to sign FTA with Belarus;
- Structure of Serbian export makes some of its segments competitive on these markets;
- Key countries of the region are Russia, Ukraine, Belarus and Kazakhstan.

Near and Middle East and North Africa Region (BSISA)

Near and Middle East and North Africa Region used to be a significant market for Serbian foreign trade during 1970's and 1980's. Serbian export to these countries is now about 1.8%, but with a strong growth of 40.4% that surpasses the total export growth.

This region consists of: Egypt, Libya, Morocco, Angola, Tunisia, Turkey, Iran, Israel, Jordan, Kuwait, Lebanon, Oman, Qatar, Saudi Arabia, Syria and United Arab Emirates.

EXAMPLE- from the second half of the past decade –
Foreign trade exchange of Republic of Serbia with CIS,
in million euro

2006

2007

Growth rate

	Export	Import	Differen ce	Export	Export	Differen ce	Expo rt	Expo rt	Differen ce
Turkey,	30.7	204.0	-173.2	42.2	284.2	-242.0	37.6	39.4	39.7
Egypt	13.6	7.2	6.4	14.8	9.8	5.0	8.9	36.1	-21.5
Israel	13.2	23.7	-10.6	12.0	26.8	-14.8	-8.6	13.1	40.1
Iran	6.5	3.0	3.6	11.7	4.8	6.8	78.1	61.9	91.6
UAE	5.6	2.0	3.6	10.7	2.2	8.4	90.2	12.5	132.7
Syria	7.2	4.7	2.5	7.9	6.4	1.4	8.7	37.1	-43.7
Jordan	0.9	0.1	0.8	6.9	0.2	6.7	652.8	67.8	738.7
Saudi Arabia	1.6	1.9	-0.3	5.8	2.0	3.7	263.1	9.5	-1,457.3
Algeria	5.6	0.1	5.5	5.2	0.0	5.1	-7.5	-66.1	-6.3
Libya	2.7	0.5	2.2	3.6	1.5	2.0	31.5	184.2	-6.6
Morocco	1.8	5.9	-4.1	3.6	11.1	-7.6	99.0	87.2	82.1
Tunisia	0.5	2.6	-2.1	2.6	7.7	-5.1	422.1	201.8	147.3
Lebanon	0.9	0.0	0.8	2.0	0.2	1.8	125.5	345.9	115.8
Kuwait	0.8	0.8	-0.1	0.7	0.4	0.3	-7.8	-49.1	-582.0
Angola	0.8	0.1	0.7	0.4	0.1	0.2	-49.5	63.6	-64.1
Qatar	0.2	2.3	-2.1	0.1	4.1	-4.1	-69.8	81.5	97.0
Oman	0.0	0.8	-0.8	0.0	2.5	-2.5	-93.6	210.9	229.6
total BSISA	92.7	259.7	-167.0	130.1	364.4	-234.3	40.4	40.3	40.3
Total all countries	5,102.5	10,462.5	-5,360.1	6,432.6	13,345.5	-6,912.9	26.1	27.6	29.0

BSISA participation	1.8	2.5	3.1	2.0	2.7	3.4
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Source: Republic Institute for Statistics

These markets potentials are:

- GDP growth in the previous period was averagely 5.7% per year, with tendencies to continue in such manner in future;
- Total number of population in this market is 388.2 million;
- Republic of Serbia has traditionally good political and economic relations with certain countries of this region ;
- Structure of Serbian export makes some of its segments competitive on these markets;
- Key countries of the region are: Turkey, Egypt, Israel, Iran, Libya and Jordan.

SWOT ANALYSIS

SWOT analysis presents the advantages, weaknesses, opportunities and threats for achieving the high growth rates of Republic of Serbia export. It makes it possible to identify positive and negative factors that influence the achievement of objectives and makes the balance between internal abilities and external opportunities.

SWOT analysis to achieve high growth rates of Republic of Serbia export

Advantages: Weaknesses:

- | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> - Strong raw materials base in certain groups of products (basic metals, iron and steel, wood, food industry) - Geographic position (Corridors VII and X) - High | <ul style="list-style-type: none"> - Insufficient number of large business systems able to provide large export - Weak image of Serbia in the world - Insufficient investment in the export sector - Inadequate export structure |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

economic growth since 2000	– High percentage of lower
- Potentials for development of human capital	processing phase products in total export
- Dynamic SME sector	- High costs of export financing - High political risk of the country - Falling behind successful transition countries

Opportunities: Threats:

- Free Trade Agreement with Russian Federation	- Possible slow down of world economy (USA and EU)
- CEFTA Agreement	- Strengthening of competition
- Traditionally good relations with former SFRY countries	from surrounding countries
- Possible growth of the world economy, especially in countries of the region	- Falling behind in the European integrations - Political instability - Being late with large national infrastructural projects - Deterioration of exchange process

STRATEGY OBJECTIVES

Basic objectives of Republic of Serbia Export Increase Strategy till 2011 are:

- Growth of export of merchandise and services of averagely 25% per year till 2011;
- Change in export structure from domination of products of low processing phase to domination of products of higher processing phase (higher export of products with higher value added tax) –

higher percentage of capital and expendable goods in total export from 43.2% in 2007 to 65% in 2011;

- Optimal geographic diversification of export by breaking through to the new markets;
- Increased number of companies exporting more than 10 million euro per year from 66 in 2007 to 120 till 2011.

According to macro-economic projection till 2011, with achieving goals defined by the Strategy, the foreign trade deficit (goods exchange difference) would decrease from 21.5% to 15.8% GDP, with decrease of deficit of account without donations from 17.5% to 12,1%, providing thus the macro-economic stability. Necessary condition for the projections to come true is the influx of direct foreign investment of three billion euros a year, GDP growth of about 6.3% a year and increase of investment participation in the basic devices in GDP with 21.6% (estimate) in 2007 to approximately 25% in 2011.

STRATEGY PRINCIPLES

Basic Strategy principles are:

- Cooperation of business sector and Government with clearly defined duties, responsibilities and tasks regarding Strategy formulation and application;
- Formulating the system of support to export according to dynamics of joining the World Trade Organization and European Union (expected in 2014).

Strategy is based on two essential pillars:

- Small and medium enterprises capacity strengthening for export (primarily medium ones);
- Establishing of direct foreign investments incentive system for export oriented activities

End of part one